Knox County Commission

Gina Oster, 3rd District, *Madam Chair*
Kim Frazier, At-Large Seat 11, *Vice-Chair*

Damon Rawls, 1st District
Courtney Durrett, 2nd District
Shane Jackson, 4th District
Angela Russell, 5th District
Terry Hill, 6th District
Rhonda F. Lee, Esq., 7th District
Adam Thompson, 8th District
W. Andy Fox, Esq., 9th District
Larsen Jay, At-Large Seat 10

400 West Main Street
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Knoxville, TN 37902

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commission@knoxcounty.org

THE KNOX COUNTY BOARD OF COMMISSIONERS SHALL MEET IN REGULAR SESSION TO CONSIDER THE LEGISLATIVE AGENDA ON MONDAY, MARCH 23, 2026 AT 5:00 P.M. IN THE MAIN ASSEMBLY ROOM OF THE CITY-COUNTY BUILDING, 400 WEST MAIN STREET. ALL AGENDA ITEMS ARE SUBJECT TO VOTE.

Note: To view the monthly agenda, please visit https://commission.knoxcountytn.gov/ and for a live stream of the meeting, please visit https://www.knoxcm.org/#/

I. CALL TO ORDER/ROLL CALL (5:00 P.M.):

A. Devotional

Commissioner Shane Jackson

B. Pledge of Allegiance to the Flag

Commissioner Larsen Jay

C. Amendments to the Agenda

D. Education Consent Calendar

1. R-26-3-201 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Contract with Marzano Resources for two days of Professional Development Services on April 15 and June 24, 2026 at a cost of $14,200.00.
(Schools)

2. R-26-3-202 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving contracts with Bedford, Freeman & Worth Publishing Group, LLC, College Board, International Baccalaureate Organization, Savvas Learning Company, LLC, and the University of Cambridge for the provision of Advanced Academic Programs for the term of April 1, 2026 through September 30, 2026, which may be extended for five (5) additional one-year periods.
(Schools)

3. R-26-3-203 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Contract with United Elevator Services, LLC for the provision of elevators and services up to $171,071.00 for the term of March 1, 2026 through the last day of the cooperative renewal date.
(Schools)

4. R-26-3-204 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Fund Balance Designation (General Purpose School Fund) in the amount of $8,610,000.00 for the purchase of newly adopted textbooks and instructional materials for PE, Health and Wellness and Career and Technical Education.
(Schools)

5. R-26-3-205 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving receipt of a Knox County Government Grant for Carter High School in the amount of $62,700.00, with required matching funds in the amount of $62,700.00.
(Schools)

6. R-26-3-206 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Letter of Extension to the Grant Agreement with Lawson Family Foundation to extend the Grant Period to April 10, 2026 for Knox County Schools' Project SEARCH Transition-to-Work Program.
(Schools)

7. R-26-3-207 Consideration of a Resolution of the Commission of Knox County, Tennessee, authorizing the acceptance of grant funds and donations for the Knox County Schools as shown on the attached list and in the total amount of $199,765.46.
(Schools)

E. General Government Consent Calendar

8. R-26-3-110 Consideration of a Resolution of the Commission of Knox County, Tennessee confirming the Knox County Mayor's appointment of Cameron Bolin to serve in the seat of an architect on the Knox County Historic Zoning Commission. (Term expires March 1, 2031)
(County Mayor)

9. R-26-3-111 Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting the resignation of Nancy Barger (serving in the seat of a member of the Local Planning Commission) from the Knox County Historic Zoning Commission and confirming the Knox County Mayor's appointment of Matthew Anderson to complete the unfulfilled term of Ms. Barger on the Historic Zoning Commission. (Term expires March 1, 2030)
(County Mayor)

10. R-26-3-301 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the Addendum to the Memorandum of Understanding between Knoxville Leadership Foundation and the Knox County Sheriff's Office outlining the financial commitment of $135,000.00 from July 1, 2025 to December 31, 2027 for facility utilization and access to inmate clientele at the Roger D. Wilson Detention Facility.
(Sheriff)

11. R-26-3-302 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the FY2026 Homeland Security Task Force Overtime Cost Reimbursement Agreement not to exceed $30,000.00 per investigation in overtime expenses incurred by the Knox County Sheriff's Office.
(Sheriff)

12. R-26-3-303 Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting a TJX Law Enforcement Grant in the amount of $5,000.00 for the purchase of surveillance equipment.
(Sheriff)

13. R-26-3-304 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving Amendment One to a Contract with the Tennessee Department of Human Services for the provision of Title IV-D Child Support Enforcement Services in the amount not to exceed $281,108.05 with a local match requirement of $144,813.24 for the period beginning on July 01, 2026 and ending on June 30, 2027.
(Sheriff)

14. R-26-3-401 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving Amendment No. 3 to the Local Agency Project Agreement with the Tennessee Department of Transportation (TDOT) for the Knox County ATMS Phase II project to revise Exhibit A with additional PE-NEPA and PE-DESIGN funds.
(Engineering and Public Works)

15. R-26-3-402 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the issuance of a Jackson Law approval letter to Liberty Tire Recycling, LLC allowing them to proceed with the Tennessee Department of Environment and Conservation's (TDEC) Permit by Rule permit approval process.
(Engineering and Public Works)

16. R-26-3-403 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a real property agreement of sale with Connie
To Be Added and Daniel Gard for 4,211 sq. ft. of surplus right of way at 0 and 3304 Lobetti Road in the amount of $500.00. **(TO BE ADDED)**
(Engineering and Public Works)

17. R-26-3-404 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a construction contract in the amount of
To Be Added $278,752.00 with Stansell Electric Company, Inc. for the installation of a traffic signal at the intersection of Lovell Road (S.R. 131) and Gilbert Drive. **(TO BE ADDED)**
(Engineering and Public Works)

18. R-26-3-405 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the necessary right-of-way and temporary
To Be Added construction easement acquisitions on three (3) tracts for the Bakertown Road and Joe Hinton Road realignment project. **(TO BE ADDED)**
(Engineering and Public Works)

19. R-26-3-406 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the necessary right-of-way acquisitions on
To Be Added three (3) tracts for the installation of a traffic signal at the intersection of Schaad Road and Johnson Road. **(TO BE ADDED)**
(Engineering and Public Works)

20. R-26-3-407 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a State Aid Contract with the Tennessee
To Be Added Department of Transportation (TDOT) for the engineering of the widening of 2.76 miles S Northshore Drive for a cost of $565,745.00, with $554,430.10 (98%) provided by TDOT and $11,314.90 (2%) provided by Knox County. **(TO BE ADDED)**
(Engineering and Public Works)

21. R-26-3-408 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Proposal for Professional Services for
To Be Added Stormwater Manual Development in the amount of $152,420.00 with WSP USA Inc. **(TO BE ADDED)**
(Engineering and Public Works)

22. R-26-3-501 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the National Opioid Settlement Agreement
To Be Added with Six Regional Distributors/Dispenser Regional Distributors/Dispenser Defendants (Six Remnant Defendants). **(TO BE ADDED)**
(Community Development)

23. R-26-3-601 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a grant contract in the amount not to exceed $1,755,213.10 with the Tennessee Department of Health for the provision of Parents as Teachers, Temporary Assistance for Needy Families, and Evidence Based Home Visiting Program Services for the period beginning July 1, 2026 and ending on June 30, 2027. (No application or local match required)
(Health Department)

24. R-26-3-701 Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting donations in the total amount of $5,622.00 and seven (7) barrels of non-perishable food items and approving the donation of the same to the Love Kitchen.
(Parks and Recreation)

25. R-26-3-702 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving an Easement Agreement with Walker Enterprises, LLC to grant to Walker Enterprises the necessary right-of-way and easements on six (6) tracts for the Mont Richer, Unit 3 project.
(Parks and Recreation)

26. R-26-3-703 Consideration of a Resolution of the Commission of Knox County, Tennessee, authorizing the acceptance of a donation to Knox County Parks and Recreation from Jake Mynatt, President of Halls Community Park, Inc., for the installation of French drains around the batting cages at Gibbs Ruritan Park.
(Parks and Recreation)

27. R-26-3-704 Consideration of a Resolution of the Commission of Knox County, Tennessee, authorizing the acceptance of a donation of a memorial plaque from the Tennessee Federation of Garden Clubs, Inc., District IV, to Knox County Parks and Recreation.
(Parks and Recreation)

28. R-26-3-705 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Contract with TinyMobileRobots and a Lease Agreement with First Western Equipment Finance for Robotic Line Marking Solutions for Knox County sports fields.
(Parks and Recreation)

29. R-26-3-706 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a revised Memorandum of Understanding
To Be Added with the National Recreation and Park Association (NRPA) for the acceptance of grant funds in the amount of $20,000.00 and $89,580.00 as an in-kind donation for the provision of youth sports activities and programming. (No local match required) **(TO BE ADDED)**
(Parks and Recreation)

30. R-26-3-801 Consideration of a Resolution of the Commission of Knox County, Tennessee, requesting the unclaimed balance of accounts remitted to the State Treasurer under the Unclaimed Property Act for the report year ending June 30, 2023.
(Finance)

31. R-26-3-901 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving an Extension of Contract No. 21-799 with Pugh & Company, PC for professional auditing services for the Fiscal Year 2026 independent audit of the accounts of Knox County in the amount of $380,500.00.
(Audit Committee)

32. R-26-3-902 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Sub-Easement Agreement between Knox County and Peace Communications, LLC to continue leasing space in the Summer Place facility in the annual amount of $268,891.32 with a 3% increase realized annually for the next ten (10) years with two (2) 5-year additional options for renewal.
(Public Building Authority)

33. R-26-3-903 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the amendment and restatement of the Knox County Employee Disability Benefit Plan to eliminate the 90-day waiting period for disability benefits; remove the requirement that a participant exhaust accrued leave prior to disability approval and instead provide for payment of all accrued leave upon approval of disability benefits; and require that a participant be on approved leave and not actively working within two (2) weeks of applying for disability benefits and during the pendency of the disability review process.
(Retirement Board)

34. R-26-3-904 Consideration of a Resolution of the Commission of Knox County, Tennessee, approving Amendment Four to a Grant Contract with
To Be Added the Tennessee Department of Human Services related to IV-D Magistrate services for the Knox County Juvenile Court, which amendment increases the maximum liability of the State under the Contract by $429,064.02, increases the local match requirement by $221,032.98, and extends the term of the Contract to end June 30, 2027. **(TO BE ADDED)**
(Juvenile Court)

F. Honorary Resolutions

35. R-26-3-101 Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring Sterling "Sterl the Pearl" Henton for his dedication to the community, passionate leadership, and unending Volunteer Spirit.
(Commissioner Jay)

36. R-26-3-102 Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring the Central High School Lady Bobcats Basketball Team for winning the District Championship.
(Commissioner Durrett)

37. R-26-3-103 Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring the 250th Anniversary of the U.S. Postal Service.
(Full Commission)

38. R-26-3-104 Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring and celebrating the life and legacy of former
To Be Added Knox County Commissioner Diane Jordan. **(TO BE ADDED)**
(Commissioners Rawls, Durrett, Oster, Jackson, Hill, Lee, Thompson, Jay and Frazier)

39. R-26-3-105 Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring the members of the Class of 2026 Junior
To Be Added Commission Civics Education Program upon their program completion. **(TO BE ADDED)**
(Full Commission)

G. Presentations

40. Presentation: Rural Metro. **(TO BE ADDED)**
(Commissioner Oster)
To Be Added

H. Public Forum - Agenda Items Only

I. Approval of Minutes of Previous Meeting

J. Drives and Roads

41. Consideration of the Acceptance of New County Roads:

A) Eclipse Lane located in The Ridge at Neals Landing Unit 1, District 8.
B) Illumination Lane located in The Ridge at Neals Landing Units 1 & 2, District 8.
C) Limelight Lane located in The Ridge at Neals Landing Unit 1, District 8.
D) Neals Landing Road located in The Ridge at Neals Landing Unit 2, District 8.
E) Limelight Lane located in The Ridge at Neals Landing Unit 3, District 8.
F) Vista View Lane located in The Ridge at Neals Landing Unit 3, District 8.
(Engineering and Public Works)

K. Line Item Transfers

42. Line Item Transfers - Total amount of $18,715.66.
(Finance)

L. Budget Amendments

M. Notary Public Applications

N. Spread of Record

43. Spread of Record the Order of the Knox County Mayor reappointing Mark Dixon to the Board of Commissioners of the Knox Chapman Utility District.
(County Mayor)

44. Spread of Record the grant application to the State of Tennessee, Department of Finance and Administration, Office of Criminal Justice Programs for funding a Victims of Crime Act (VOCA) Victim Witness Coordinator Position submitted by the Knox County District Attorney's Office.
(District Attorney)

45. Spread of Record the election of Ashley Ramos to represent the Knox County Mayor's Office Seat A, Sara Crosby to represent the Knox County Sheriff's Office Seat B, and Michael Mays representing constitutional/fee offices Seat C on the Health Insurance Appeal Board to fulfill terms beginning March 1, 2026, and ending February 28, 2030.
(Benefits)

O. General Government Resolutions (non-consent)

46. R-26-3-112 Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting the resignation of Daniel Herrera on the Knox County Sheriff's Office Employees' Merit System Board of Directors and appointing _____ to serve the unfulfilled term of Mr. Herrera on the Board, which such term to expire September 30, 2028.
(Commissioner Oster)

P. Ordinances on First Reading

47. O-26-3-101 **1st Reading** **2/3 Vote** Consideration of an Ordinance of the Commission of Knox County, Tennessee, repealing Section 58-1 of the Knox County Code regarding Vehicle Registration Fees. (Ord. No. O-03-5-101, adopted 6-23-03; Ord. No. O-04-5-101(A), adopted 6-28-04; Ord. No. 09-2-101, adopted 3-23-09; Ord. No. O-19-8-101, adopted 9-23-19; and Ord. No. O-19-9-101, adopted 10-28-19) **(FIRST READING) (DEFERRED FROM AUGUST 2025 AT REQUEST OF FULL COMMISSION)** ***(REQUIRES 2/3 VOTE)***
(Commissioner Jay and County Mayor)

Q. Ordinances on Second Reading

48. O-26-2-101 **2nd Reading** Consideration of an Ordinance of the Commission of Knox County, Tennessee, to repeal Knox County Code Sections 18-141 and 18-142 relative to the operation of the East Tennessee Regional Juvenile Service Center and adopting new Sections 18-141 and 18-142 to place the control and supervision of the Juvenile Service Center under the Knox County Juvenile Court Judge and to create an Advisory Board. **(SECOND READING)**
(Juvenile Service Center Board of Directors)

R. Public Forum - Open Topics

S. Other Business

49. Proclamation for Day of Hope in Knox County. **(TO BE ADDED)** *(Commissioner Frazier)*

To Be Added

T. Adjournment

RLA-18198 **R-26-3-201**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	TERRI COATNEY, KNOX COUNTY SCHOOLS
Department:	KNOX COUNTY SCHOOLS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Contract with Marzano Resources for two days of Professional Development Services on April 15 and June 24, 2026 at a cost of $14,200.00.
(Schools)

Attachments

Resolution
Contract
Fiscal Note

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A CONTRACT WITH MARZANO RESOURCES FOR TWO DAYS OF PROFESSIONAL DEVELOPMENT SERVICES ON APRIL 15 AND JUNE 24, 2026 AT A COST OF $14,200.00.

RESOLUTION: R-26-3-201

REQUESTED BY: SCHOOLS

PREPARED BY: KNOX COUNTY LAW DIRECTOR'S OFFICE

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, Knox County Schools desires to enter into a contract with Marzano Resources for two days of Professional Development Services on April 15 and June 24, 2026; and

WHEREAS, the proposed contract sets forth the terms and conditions under which the services will be provided; and

WHEREAS, at its regularly scheduled meeting on March 5, 2026, the Knox County Board of Education approved the contract with Marzano Resources for Professional Development at a cost of $14,200.00.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Contract with Marzano Resources for two days of Professional Development Services on April 15 and June 24, 2026 is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Contract with Marzano Resources for two days of Professional Development Services on April 15 and June 24, 2026 shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Knox County Government

and

Marzano Resources

This Contract, made and entered into between the Knox County Government and Knox County Schools, hereinafter referred to as the "County" and Marzano Resources, hereinafter referred to as "Contractor."

Whereas, the County requested a quote for Professional Development for Knox County Government and Knox County Schools and;

Whereas, Contractor submitted a Purchase Agreement in accordance with said requested specifications, meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Purchase Agreement, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Purchase Order and the Contractor's Purchase Agreement.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this Contract.** This Contract commences on the 1st day of March 2026 and ends upon completion of the services, unless terminated in conformity with the terms of this Contract as contained in paragraphs four and five.

2. **Amendments.** No alterations, amendments, changes, modification or additions to this Contract shall be binding on Knox County without prior written approval of the County.

3. **Payment.** Knox County requires a minimum of thirty (30) days to process payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, Contractor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted. The County shall remit payment to the Contractor for properly submitted invoices in accordance with the County's Purchase Order, the Contractor's Purchase Agreement, and the terms as negotiated by the parties; pursuant to all payments being subject to the County's review and approval. Services shall only be rendered upon the issuance of a signed purchase order. In consideration for the performance of the services described in the Purchase Agreement, and upon Knox County Schools' determination that such services have been performed satisfactorily, the Schools shall compensate the Contractor in accordance with the following payment schedule:

April 2026 Professional Development $7,100.00
June 2026 Professional Development $7,100.00

4. **Termination..** The County may terminate this Contract with or without cause, upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, Contractor agrees to give thirty (30) days advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County. For the purposes of this Contract, interruption shall not include interruptions due to normal system maintenance or Force Majeure events.

5. **Appropriations.** In the event no funds are appropriated by the County for professional development sessions listed in the Purchase Agreement in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously

appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

6. **Independent contractor.** Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

7. **Compliance with all federal, state, and municipal laws.** Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of professional development services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

8. **Severability clause.** If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

9. **Prohibition against assignment.** Contractor shall not transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of the County. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

10. **This Contract** shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient form.

11. **Right to inspect.** Pursuant to Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

12. **Nondiscrimination and non-conflict statements.** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

13. **Books and records.** Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract. Knox County is subject to the Tennessee Open Records Act 10-7-503 et seq. Knox County will comply with all legitimate requests.

14. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Knox County has not been given authority under the laws of the State of Tennessee to indemnify a contractor under any circumstances. This includes but is not limited to, Third Party Claims. The inclusion of any language requiring indemnification by the County in this Contract or any supplemental documents, will not be accepted.

15. **Delivery.** Contractor shall provide Professionally Development Services to Knox County Schools in accordance with issuance of a signed Purchase Order.

16. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective federal, state, county, and city taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

17. **Limitations of liability.** In no event shall the County or Contractor be liable for indirect, incidental, consequential, special or exemplary damages or lost profits, even if the County and/or Contractor has been advised of the possibility of such damages. No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20- 101 et seq. Any liability to the Contractor or third parties for any

claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

18. **Criminal Background Check.** The Contractor shall comply with Tennessee Code Annotated §49-5-413. As required by law, the Contractor shall obtain fingerprinting and criminal history record checks from the Tennessee Bureau of Investigation and the Federal Bureau of Investigation for any employee or subcontractor personnel who will enter school grounds in the performance of this Contract prior to allowing such personnel on school grounds when students are present or expected to be present. All costs for criminal background checks shall be borne by the Contractor. If any employee or subcontractor personnel has previously undergone a criminal history records check in accordance with §49-5-413, the Contractor may provide a copy of that background check to the County, which shall satisfy this requirement. The Contractor shall submit a Criminal History Records Check Affidavit to the County as proof of compliance with this requirement.

19. **Insurance.** The Contractor shall provide a Certificate of Insurance, including all corresponding endorsement page(s), evidencing the required coverage and naming Knox County and Knox County Schools as Additional Insureds. The Contractor is responsible for maintaining a current Certificate of Insurance and endorsement page(s) on file with Knox County Procurement for the duration of the Purchase Agreement.

20. **Grant Funding.** The services procured under this Contract are funded with federal grant money. The Contractor shall comply with all requirements set forth in Exhibit A in the performance of the services.

21. **Contract documents.** This Contract is the leading document and shall take precedence over any documents referenced herein. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Contractor's Purchase Agreement

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____

BOARD CHAIR – Signature **BOARD CHAIR**

Date:_____

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO. 26-096
APPROVED AS TO LEGAL FORM

_____ Gary Dupler

LAW DIRECTOR – Signature **LAW DIRECTOR – Printed Name**

Date: 2/20/2026

CONTRACTOR

_____ _____

AUTHORIZED SIGNATURE **CONTRACTOR – Printed Name**

MARZANO RESOURCES
COMPANY NAME

Date:_____

EXHIBIT A
GENERAL FEDERAL FUNDING REQUIREMENTS
KNOX COUNTY PROCUREMENT DIVISION

Equal Employment Opportunity
During the performance of this contract, the contractor agrees as follows:
(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following: Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act
Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

Marzano Resources
Purchase Agreement

Effective January 20, 2026, Marzano Resources, LLC ("Marzano Resources") located at 555 N. Morton St., Bloomington, IN 47404 and Knox County Schools ("Customer") located at 400 W. Summit Hill Drive PO Box 2188, Knoxville, TN 37902 agree as follows:

1. **Summary of Products and Services:** Customer will purchase the following Marzano Resources products and services ("Products"). Additional Products may be added by mutual written Agreement.

Products and Services	Total
Professional Development	$14,200.00
Total	$14,200.00

2. **Payment Terms:** Customer will provide Marzano Resources with a purchase order made out to Marzano Resources, 555 N. Morton St., Bloomington, IN 47404, for the full amount due under this Agreement upon execution of this Agreement (the "Purchase Order Due Date"). A non-refundable deposit of 20% of the Professional Development amount will be invoiced upon execution of this Agreement. The total includes any travel, lodging, and incidental expenses incurred by Marzano Resources. All payments are due net 30 days from the actual date of invoice. All past due invoices are subject to a finance charge of 1.5% monthly. Marzano Resources will invoice Customer off of the purchase order based on the following schedule:

Description	Payment	Expected Invoice Date
20% Deposit (non-refundable)	$2,840.00	Upon execution of Agreement
April 2026 Session	$5,680.00	April 15, 2026
June 2026 Session	$5,680.00	June 24, 2026

3. **Professional Development**

   3.1. **Description of Services:** Marzano Resources will provide a speaker ("Associate") to perform the professional development services described in Exhibit A.

   3.2. **Presentation Materials:** Customer will reproduce any handouts and other print materials related to the services and will notify the Associate directly of any deadlines for reproduction.

   3.3. **Venue and Audio/Visual Equipment:** Customer will provide a venue, audio/video equipment, and technical support for all sessions.

4. **General Terms**

   4.1. **Intellectual Property:** Customer acknowledges that Marzano Resources or Associate owns the copyrights to all tangible or electronic presentation materials, handouts, and/or program books used in conjunction with services performed under this Agreement and that no materials will be developed specifically for Customer. Marzano Resources will retain all copyrights owned prior to entering this Agreement, and Customer may not reproduce any materials not designated

reproducible without the express written permission of Marzano Resources. All audio, video, and digital recording of the services by Customer is prohibited.

4.2. Force Majeure: If an event beyond the parties' control makes performance impossible, illegal, or commercially impracticable (a "Force Majeure Event"), the parties will proceed as follows:

a. If a Force Majeure Event prevents services from occurring onsite, the parties will arrange for the affected services to be delivered virtually on the scheduled dates.
b. If a Force Majeure Event prevents services from occurring as scheduled, the parties will use best efforts to reschedule or make substitutions for affected services or products.
c. If a Force Majeure Event prevents performance entirely, neither party will have any further liability to the other party for the prevented performance.
d. All obligations unaffected by a Force Majeure Event will remain in place.

4.3. Termination: Marzano Resources may terminate this Agreement if Marzano Resources has not received a purchase order by the Purchase Order Due Date.

a. **Professional Development:** If Customer cancels any Professional Development Services within 90 days of the scheduled date for any reason but Force Majeure, Customer will reimburse Marzano Resources for any reasonable business expenses incurred in anticipation of performance of this Agreement that exceed the amount of the deposit. If events beyond the parties' control make performance on the scheduled dates impossible, the parties will make a good faith effort to reschedule the Professional Development Services.

b. **Resource Returns and Refunds:** Resource returns and refunds will be handled by the Return Policy outlines at https://www.marzanoresources.com/customer-service/product-orders.

4.4. Entire Agreement: This Agreement and any exhibits attached hereto constitute the entire agreement of the parties and supersede any prior or contemporaneous written or oral understanding or agreement. No waiver or modification of any of the terms of the Agreement will be effective unless made in writing and signed by both parties, and the unenforceability, invalidity, or illegality of any provision of this Agreement will not render the other provisions unenforceable, invalid, or illegal. Any waiver by either party of any default or breach hereunder will not constitute a waiver of any provision of this Agreement or of any subsequent default or breach of the same or a different kind.

MARZANO Resources

Exhibit A

Description of Professional Development Services

Service 1
Date: April 15, 2026
Speaker: Kevin Ryan
Topic: Improving Teacher Development and Evaluation, Part 1
Format: Onsite
Cost: $7,100.00

Service 2
Date: June 24, 2026
Speaker: Kevin Ryan
Topic: Improving Teacher Development and Evaluation, Part 1
Format: Onsite
Cost: $7,100.00

KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

Contract approval for two days of professional development services with Marzano Resources using Title II-A funds for CTE Teacher Development. Contract has been vetted by Knox County Procurement.

Cost to Knox County Schools

$14,200.00

Description and Type of Funding Source

Title II-A

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

RLA-18200 **R-26-3-202**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	TERRI COATNEY, KNOX COUNTY SCHOOLS
Department:	KNOX COUNTY SCHOOLS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving contracts with Bedford, Freeman & Worth Publishing Group, LLC, College Board, International Baccalaureate Organization, Savvas Learning Company, LLC, and the University of Cambridge for the provision of Advanced Academic Programs for the term of April 1, 2026 through September 30, 2026, which may be extended for five (5) additional one-year periods.
(Schools)

Attachments

Resolution
Bedford, Freeman & Worth Contract
College Board Contract
International Baccalaureate Contract
Savvas Learning Contract
University of Cambridge
Fiscal Note

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING CONTRACTS WITH BEDFORD, FREEMAN & WORTH PUBLISHING GROUP, LLC, COLLEGE BOARD, INTERNATIONAL BACCALAUREATE ORGANIZATION, SAVVAS LEARNING COMPANY, LLC, AND THE UNIVERSITY OF CAMBRIDGE FOR THE PROVISION OF ADVANCED ACADEMIC PROGRAMS FOR THE TERM OF APRIL 1, 2026 THROUGH SEPTEMBER 30, 2026, WHICH MAY BE EXTENDED FOR FIVE (5) ADDITIONAL ONE-YEAR PERIODS.

RESOLUTION: **R-26-3-202**

REQUESTED BY: **SCHOOLS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, Knox County Schools desires to have a contractor provide Advanced Academic Programs; and

WHEREAS, the Knox County Procurement Division requested proposals for this purpose and it has been determined that Bedford, Freeman & Worth Publishing Group,

LLC, College Board, International Baccalaureate Organization, Savvas Learning Company, LLC, and The Chancellor, Masters, and Scholars of the University of Cambridge submitted the proposals that are most responsible and responsive and best conform to the specifications and needs of Knox County and the Knox County Schools; and

WHEREAS, the proposed contracts with Bedford, Freeman & Worth Publishing Group, LLC, College Board, International Baccalaureate Organization, Savvas Learning Company, LLC, and The Chancellor, Masters, and Scholars of the University of Cambridge are effective beginning April 1, 2026 and ending September 30, 2026 and may be extended for five (5) additional one-years periods; and

WHEREAS, at its regularly scheduled meeting on March 5, 2026, the Knox County Board of Education approved the contracts with Bedford, Freeman & Worth Publishing Group, LLC, College Board, International Baccalaureate Organization, Savvas Learning Company, LLC, and The Chancellor, Masters, and Scholars of the University of Cambridge.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The contracts with Bedford, Freeman & Worth Publishing Group, LLC, College Board, International Baccalaureate Organization, Savvas Learning Company, LLC, and The Chancellor, Masters, and Scholars of the University of Cambridge for the provision of Advanced Academic Programs are hereby adopted and approved in substantive form as presented this date, copies of which are attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the contracts with Bedford, Freeman & Worth Publishing Group, LLC, College Board, International Baccalaureate Organization, Savvas Learning Company, LLC, and The Chancellor, Masters, and Scholars of the University of Cambridge for the provision of Advanced Academic Programs shall be executed subject to such amendment or action not affecting the substantive provisions of the contracts as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

Presiding Officer of the Commission **Date**

County Clerk **Date**

Approved: **County Mayor** **Date**

Vetoed: **County Mayor** **Date**

Knox County Government

and

Bedford, Freeman & Worth Publishing Group, LLC

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and Bedford, Freeman & Worth Publishing Group, LLC, hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this Contract.** This Contract commences on the 1st day of April 2026 and ends the 30th day of September 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. Upon the mutual agreement of the vendor and the County, the award may be extended for five (5) additional one-year periods. This may result in a total of five (5) years, five (5) months and four (4) weeks. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. **Subcontracting/partnerships:** Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. **Payment.** Contractor warrants that the pricing shall remain firm for the initial period. At the end of the first period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) calendar days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. **This Contract** shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. **Right to inspect.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. **Nondiscrimination and non-conflict statements.** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. **Books and records.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will be provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any

kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, for Advanced Academic Programs and Addendum I
C. Clarifications

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____
BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**
MAYOR – Signature **MAYOR**

Date:_____

KNOX COUNTY LAW DIRECTOR'S OFFICE
CONTRACT NO. 26-105 (a)
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

Gary Dugler
_____
LAW DIRECTOR – Signature **LAW DIRECTOR – Printed Name**

Date: 2/20/2026

CONTRACTOR

_____
AUTHORIZED SIGNATURE **CONTRACTOR – Printed Name**

BEDFORD, FREEMAN & WORTH PUBLISHING GROUP, LLC
COMPANY NAME

Date:_____

The Procurement Division of Knox County, Tennessee will receive sealed proposals for the provision of **Advanced Academics Program** as specified herein. Proposals must be received by **2:00 p.m.** on **October 14, 2025**. Late proposals will neither be considered nor returned.

Deliver Proposals To:

Proposal Number 3688
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, Tennessee 37917

The Proposal Envelope must show the Proposal Number, Proposal Name & Proposal Closing Date.

SECTION I PROPOSAL PREPARATION AND SUBMISSION

1.1 **ADDITIONAL INFORMATION:** Knox County wants requests for additional information routed to Jay Garrison, Procurement Coordinator, CPPO, CPPB at 865.215.5767. Questions may be faxed to 865.215.5778 or emailed to jay.garrison@knoxcounty.org. If you have not heard from the Buyer in a reasonable amount of time, please call for further assistance. Information about the Knox County Procurement Division and current solicitations may be obtained on the Internet at www.knoxcounty.org/procurement.

1.2 **ACCEPTANCE:** Vendors shall hold their price firm and subject to acceptance by Knox County for a period of one hundred twenty (120) business days from the date of the proposal closing, unless otherwise indicated in their proposal.

1.3 **ALTERNATIVE PROPOSALS:** Knox County will not accept alternate proposals (those not equal to specifications) unless authorized by the Request for Proposal.

1.4 **AUDIT HOTLINE:** Knox County has established an Audit Hotline to report potential fraud and waste. To report potential fraud, waste or abuse, please file a report online by accessing http://www.knoxcounty.org/audit/hotline.php.

Vendors are hereby cautioned that this Audit Hotline does not replace the Award Protest Procedures found in Section VI, Item M of the Knox County Procurement Regulations.

1.5 **AWARD:** Award will be made to the most responsive, responsible proposer(s) meeting specifications and presenting the product(s) and/or service(s) that is in the best interest of Knox County. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple award. Knox County reserves the right to not award this proposal. Award will be made in accordance with the evaluation criteria specified herein.

1.6 **BUSINESS OUTREACH PROGRAM:** Knox County has established a Business Outreach Program which has the responsibility of increasing opportunity for small, minority and women owned businesses. This is being accomplished through community education programs, policy edification, active recruitment of interested businesses and process re-engineering.

Knox County is committed to ensuring full and equitable participation for all disadvantaged businesses. Knox County welcomes submittals from those disadvantaged businesses that have an interest in providing goods and/or services listed herein. In addition, Knox County strongly encourages the inclusion of disadvantaged businesses by non-disadvantaged Contractors who wish to partner or subcontract portions of this agreement in order to accomplish the successful delivery of goods and/or services. If you are a disadvantaged business and would like additional information about our Business Outreach Program, please contact:

Diane Woods, Business Outreach Administrator
Telephone: 865.215.5760
Fax: 865.215.5778
Email: diane.woods@knoxcounty.org

1.7 **CONFLICT OF INTEREST:** Vendors must have read and comply with the "Non-Conflict of Interest" statement provided in the vendor registration process prior to the closing of this solicitation. Knox County's Non-Conflict of Interest Policy is available for review at https://www.knoxcounty.org/purchasing/conflict_policy.php.

1.8 **COPIES:** Knox County requires that proposals be submitted as one (1) marked as original and one (1) exact copy. **Proposers must submit with their written response an exact electronic version of their proposal in a single PDF file on a flash drive format.**

1.9 **DECLARATIVE STATEMENTS:** Any statement or words (e.g.: must, shall, will) are declarative statements and the vendor must comply with the condition. Failure to comply with any such condition may result in the proposal being considered non-responsive and disqualified.

1.10 **ELECTRONIC TRANSMISSION OF PROPOSALS:** Knox County's Procurement Division will not accept electronically transmitted proposals. Facsimile and email submissions are strictly prohibited. Due to the nature of the information requested, all submissions shall be in written format.

1.11 **HOW TO DO BUSINESS:** Knox County utilizes a web-based Procurement software system, "KnoxBuys." The system provides our clients (vendors, county departments and the citizens of Knox County) with a more enhanced and end-user friendly means of accessing our services. The system allows for on-line vendor registration and maintenance, electronic receipt of purchase orders, on-line retrieval and submittal of quotes, bids and proposals for our vendor-clients and on-line requisitioning and receiving for our county departments. In order for the County to maximize its investment and minimize the cost associated with office operations, we need your help. When doing business with Knox County, we are urging you to please go to our website at www.knoxcounty.org/procurement, register as a vendor in our on-line Procurement system, "KnoxBuys," if you have not done so and whenever possible to conduct your business with the County through this site. If you have any questions, please contact the Procurement Division Representative listed in Section 1.1 of this document.

1.12 **INCURRED COSTS:** Knox County will not be responsible for any costs incurred by the proposer in the preparation of their proposal.

1.13 **MULTIPLE PROPOSALS:** Knox County will consider multiple proposals that meet specifications.

1.14 **NON-COLLUSION:** Proposers, by submitting a signed proposal, certify that the accompanying proposal is not the result of, or affected by, any unlawful act of collusion with any other person or company engaged in the same line of business or commerce, or any other fraudulent act punishable under Tennessee or United States law.

1.15 **PAYMENT METHOD:** Knox County will utilize a Purchase Order for placing an order for products and/or services. Purchase Orders will be issued from the Knox County Procurement Division via the method selected by the vendor during registration. The Purchase Order will detail the quantity, specific item(s) and the contracted price for each item. Work on this project must not commence until a signed Purchase Order is issued by Knox County Procurement.

1.16 **POSSESSION OF WEAPONS:** All vendors, their employees and their agents are prohibited from possessing any weapons on Knox County property without prior written consent from the County. In the case of a vendor whose Contract requires possession of firearms or other weapons to successfully complete their Contract, vendor must provide personnel who are bonded to bear said weaponry.

1.17 **PROCESSING TIME FOR PAYMENT:** Vendors are advised that a minimum of thirty (30) days is required to process invoices for payment.

1.18 **PROOF OF FINANCIAL AND BUSINESS CAPABILITY:** Vendors must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these specifications. Knox County will make the final determination as to the vendor's ability.

1.19 **PROPOSAL DELIVERY:** Knox County requires proposers, when hand delivering proposals, to time and date stamp the envelope before depositing it in the bid box. Knox County will not be responsible for any lost or misdirected mail sent by common carrier, nor will Knox County be responsible for proposals delivered to addresses or Suites other than the delivery address and Suite specified at the top of this solicitation. The time clock in the Procurement Division shall serve as the official record of time.

Solicitations must be in a sealed envelope/box prior to entering the Procurement Division office. Procurement Division personnel are not allowed to see the submittal nor assist in placing documents in an envelope/box. Additionally, the Procurement Division is not responsible for providing materials (e.g. envelopes, boxes, tape) for submittals.

1.20 **RECYCLING:** Knox County, in its continuing efforts to lessen the amount of landfill waste and to further recycling efforts, requests that proposals being submitted on paper shall:

1.20.1 Be submitted on recycled paper;
1.20.2 Not include pages of unnecessary advertising;
1.20.3 Be made on both sides of each sheet of paper.

1.21 **RESTRICTIVE OR AMBIGUOUS SPECIFICATIONS:** It is the responsibility of the prospective proposer to review the entire Request for Proposal packet and to notify the Procurement Division if the specifications are formulated in a manner that would unnecessarily restrict competition. Any such protest or question regarding the specifications or proposing procedures must be received in the Procurement Division by **September 26, 2025 at 4:30 p.m. local time**. These requirements also apply to specifications that are ambiguous.

1.22 **SIGNING OF PROPOSALS:** In order to be considered, all proposals must be signed. Please sign the original in blue ink. By submitting a signed letter authorizing the submission of the proposal, the vendor acknowledges and accepts the terms and conditions stated in the proposal document.

1.23 **TAXES:** Knox County purchases are not subject to taxation. Tax exemption certificates will be provided upon request.

1.24 **TITLE VI OF THE 1964 CIVIL RIGHTS ACT AND TITLE IX OF THE EDUCATIONAL AMENDMENT OF 1972:** "Nondiscrimination in Federally Assisted Programs"—"No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." 42 U.S.C. Section 2000. It is the policy of Knox County Government that all its services and activities be administered in conformance with the requirements of Title VI and Title IX.

1.25 **UNFORESEEN CIRCUMSTANCES:** During periods of closure due to unforeseen circumstances in Knox County or closures at the direction of the Knox County Mayor, the Procurement Division will enact the following procedures in regard to solicitations and closures:

- If the Mayor closes the Administrative offices prior to the time set for solicitation opening of any business day, all solicitations due that same day will be moved to the next operational business day.
- Other unforeseen circumstances shall be at the sole discretion of the Procurement Director.
- Knox County shall not be liable for any commercial carrier's decision regarding deliveries during any unforeseen circumstances.

1.26 **USE OF PROPOSAL FORMS:** Vendors must complete the proposal forms contained in the proposal package. Failure to complete the proposal forms may result in proposal rejection.

1.27 **VENDOR DEFAULT:** Knox County reserves the right, in case of vendor default, to procure the articles or services from other sources and hold the defaulting vendor responsible for any excess costs occasioned thereby. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidder's list for twenty-four (24) months.

1.28 **VENDOR REGISTRATION:** Prior to the submission deadline for this solicitation, ***ALL PROPOSERS MUST*** be registered with the Procurement Division. If you are not already a registered vendor with Knox County, register on-line at our website at www.knoxcounty.org/procurement and click on "Knox Buys" and then select "Online Vendor Registration." Vendors must be registered with the Procurement Division **prior** to submitting their proposal. Knox County shall not be responsible for technical difficulties experienced by vendors trying to register electronically less than twenty-four (24) hours prior to the proposal closing time.

1.29 **WAIVING OF INFORMALITIES:** Knox County reserves the right to waive minor informalities or technicalities when it is in the best interest of Knox County.

SECTION II OBLIGATIONS, RIGHTS AND REMEDIES

These terms and conditions shall be part of the Contract. Knox County reserves the right to negotiate other terms and conditions it deems appropriate and necessary under the circumstances to protect the public's trust.

2.1 **ALTERATIONS OR AMENDMENTS:** No alterations, amendments, changes, modifications or additions to this Contract shall be binding on Knox County without the prior written approval of the County.

2.2 **APPROPRIATION:** In the event no funds are appropriated by Knox County for the goods or services in any fiscal year, or insufficient funds exist to purchase the goods or services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

2.3 **ASSIGNMENT:** Contractor shall not assign or sub-contract this agreement, its obligations or rights hereunder to any party, company, partnership, incorporation or person without the prior written specific consent of Knox County.

2.4 **BOOKS AND RECORDS:** Vendor shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices at all reasonable times during the Contract period and for five (5) years from the date of the final payment under this agreement for inspection by County or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Vendor's costs of manufacturing, acquiring or delivering the products and services governed by this agreement.

2.5 **CHILD LABOR:** Contractor agrees that no products or services will be provided or performed under this Contract that have been manufactured or assembled by child labor.

2.6 **COMPLIANCE WITH ALL LAWS:** Contractor is assumed to be familiar with and agrees to observe and comply with all Federal, State, and Local laws, statutes, ordinances, and regulations in any manner affecting the provision of goods and/or services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

2.7 **CRIMINAL HISTORY RECORDS CHECK:** Any and all successful proposers, Contractor's employees, Contractor's subcontractors and the employees of any subcontractors must submit to a criminal history records check at the Contractor's expense, conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413. Proposers **must** submit with their proposals the Criminal History Affidavit of Compliance.

2.8 **DEFAULT:** If Contractor fails to perform or comply with any provision of this Contract or the terms or conditions of any documents referenced and made a part hereof, Knox County may terminate this Contract, in whole or in part, and may consider such failure or noncompliance a breach of Contract. Knox County expressly retains all its rights and remedies provided by law in case of such breach, and no action by Knox County shall constitute a waiver of any such rights or remedies. In the event of termination for default, Knox County reserves the right to purchase its requirements elsewhere, with or without competitive solicitation.

2.9 **GOVERNING LAW; VENUE:** This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

2.10 **INCORPORATION:** All specifications, drawings, technical information, Request for Proposal, Proposal, Award and similar items referred to or attached or which are the basis for this Contract are deemed incorporated by reference as if set out fully herein.

2.11 **INDEMNIFICATION—HOLD HARMLESS:** Contractor shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of Contractor, its subcontractors, suppliers, agents or employees.

2.12 **INDEPENDENT CONTRACTOR:** Contractor shall acknowledge that it and its employees serve as independent contractors and that Knox County shall not be responsible for any payment, insurance or incurred liability.

2.13 **INSPECTION AND ACCEPTANCE:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

2.14 **IRAN DIVESTMENT ACT:** By submission of this Request for Proposal response, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

2.15 **LIMITATIONS OF LIABILITY:** In no event shall Knox County be liable for any indirect, incidental, consequential, special or exemplary damages or lost profits, even if Knox County has been advised of the possibility of such damages.

2.16 **NO BOYCOTT OF ISRAEL:** Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the Contract engage in, a boycott of Israel. Proposers must submit with their proposals the completed Iran Divestment Act/No Boycott of Israel Affidavit.

2.17 **NON-DISCRIMINATION AND NON-CONFLICT STATEMENT:** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex **or** national origin any individual trait or characteristic found to be an illegal consideration, shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this agreement or in the employment practices of vendor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination. Contractor covenants that it complies with the Fair Wage and Hour Laws, the National Labor Relations Act, and other Federal and State employment laws as applicable. Contractor covenants that it does not engage in any illegal employment practices.

Contractor covenants that it has no public or private interest and shall not acquire directly or indirectly any interest that would conflict in any manner with the provision of its goods or performance of its services. Contractor warrants that no part of the total Contract amount provided herein shall be paid directly or indirectly to any officer or employee of Knox County as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor or consultant to Contractor in connection with any goods provided or work contemplated or performed relative to the agreement.

2.18 **ORDER OF PRECEDENCE:** In the event of inconsistent or conflicting provision of this Contract and referenced documents, the following descending order of precedence shall prevail: (1) Contract, (2) Request for Proposal, (3) Contractor's Response, (4) Award, (5) Special Terms and Conditions, (6) General Terms and Conditions, (7) Specifications, (8) Drawings.

2.19 **REMEDIES:** Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in Contract and in tort, including but not limited to, rejection of goods, rescission, and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

2.20 **RIGHT TO INSPECT:** Knox County reserves the right to make periodic inspections of the manner and means the service is performed or the goods are supplied and warehoused.

2.21 **SEVERABILITY:** If any provision of this Contract is declared illegal, void or unenforceable, the remaining provisions shall not be affected but shall remain in force and in effect.

2.22 **TAX COMPLIANCE:** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal or proposal and signature, it is current in its respective Federal, State, County, and City taxes of whatever kind or nature, and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Procurement Division.

2.23 **TERMINATION:** County may terminate this agreement with or without cause at anytime. In the event of termination by either party, fees due for services satisfactorily performed or goods accepted prior to the termination date shall be paid. Contractor shall not perform additional work without the expressed permission of County. In the event Contractor intends to interrupt or discontinue service under this Contract, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

2.24 **WARRANTY:** Contractor warrants to Knox County that all items delivered and all services rendered shall conform to the specifications, drawings, solicitation and/or other descriptions furnished and/or incorporated by reference, and will be fit for the particular purpose purchased of merchantable quality, good workmanship, and free from defects. Contractor extends to Knox County all warranties allowed under the U.C.C. Contractor shall provide copies of warranties to the County upon request. Return of merchandise not meeting warranties shall be at contractor's expense.

SECTION III SPECIAL TERMS AND CONDITIONS

3.1 **INTENT:** The intent of this document is to set forth and convey to prospective proposers the general requirements for vendors to provide Knox County Schools with Advanced Academic Programs as desired by Knox County and Knox County Schools (KCS). Award will be based on Best Value. Best value means more than low cost. It includes cost, technical service quality, experience, qualifications and other factors detailed herein.

3.2 **ACCEPTANCE:** Vendors are advised that the payment of an invoice does not necessarily constitute as an acceptance of services that are provided. Acceptance requires a specific written action by Knox County so stating.

3.3 **ADDITIONS OR DELETIONS:** Knox County reserves the right to add or delete services as the need arises. If services are to be added, Knox County and the Contractor will arrive at a mutually agreed price. Any additions or deletions must be approved in writing by Knox County Procurement prior to any changes in service.

3.4 **AWARD LENGTH:** The pricing for this Contract must remain firm for thirty-six (36) months. However, due to the funding source Knox County does not allow automatic renewals, this Contract will need to be extended annually to continue services. Knox County will draft the Extension of Contract and send it to the vendor approximately ninety (90) days before expiration. The agreement may be renewed for two (2) one-year periods upon mutual consent, for a possible total of five (5) years. Following the initial thirty-six (36) months, the Contractor may request a change in price.

3.5 **CHANGES AFTER AWARD:** It is possible that after award, Knox County might change its needs or requirements. Knox County reserves the right to make such changes after consultation with the vendor. Should additional costs arise, Knox County reserves the right to consider accepting these charges provided the vendor can document the increased costs. Knox County also reserves the right to accept proposed service changes from the vendor if they will lower the cost to Knox County and/or provide improved service.

3.6 **COMMUNICATION:** The successful execution of this contract will require extensive communication between all involved parties. While information may be transmitted via telephone, it should always be followed up with an email. It is essential that the Contractor have an efficient email capabilities. The Contractor will be required to submit a list of individuals, along with direct phone numbers, cell phone numbers and email addresses for the agency's contacts. These individuals must be familiar with the Knox County Contract and have authority to make adjustments as requested by Knox County.

3.7 **COMPLIANCE WITH ALL APPLICABLE REGULATIONS:** Vendor agrees and covenants that the company, its agents and employees will comply with all City, County, State and Federal codes, laws, rules and regulations applicable to the business to be conducted under this contract. If the vendor performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, the vendor shall bear all costs arising from such work.

3.8 **CONTACT PERSONNEL:** Essential to the success of this Contract is the development of a good working relationship between the vendor and Knox County. It is imperative that the Knox County account be handled efficiently and professionally. Knox County should be assigned no more than two (2) vendor contacts to handle billing inquiries and service related issues. In the event on or both contacts leave the Knox County account, the vendor shall formally introduce the new contacts to Knox County personnel. These contacts must be knowledgeable of the County's account to avoid an interruption of service.

3.9 **CONTRACT EXECUTION:** The award of this proposal may result in a Contract between Knox County and the successful vendor(s). The Contract may require Knox County Board of Education and/or Knox County Commission approval. The successful vendor(s) may be required to be present at the Board of Education and/or County Commission meeting(s) to answer questions relating to the service to be performed. Adequate notification will be given by Knox County Procurement Division if the awarded vendor(s) will need to attend meetings. There shall be no cost to Knox County for attendance of the vendor(s). Knox County will draft the Contract. The Knox County Procurement Division will not accept any vendor's contract. A sample contract is under Exhibit B for review. If Master Agreements, Service Agreements, Terms and Conditions or other contract agreements are submitted they will not be accepted.

3.10 **CONTRACTOR DUTIES:** At the Contractor's own expense, the Contractor shall:

3.10.1 Provide competent supervision;
3.10.2 Provide competent personnel;
3.10.3 Take precautions necessary to protect persons or property against injury or damage and be responsible for any such damage or injury that occurs as a result of their fault or negligence.

3.11 **DESTINATION AND DELIVERY:** All shipments that are to be delivered must be Free on Board Destination to the department ordering the items. All shipping charges are to be included in the unit price of each item. All deliveries must be unloaded and delivered inside to the department location that is ordering the items.

3.12 **EVALUATION CRITERIA:** This proposal will be evaluated using the following criteria:

As per Section 1.5, Knox County will determine the award structure that is in its best interest.

Methodology	30 Points
Delivery of Service	30 Points
Experience & References	20 Points
Cost	20 Points

Knox County may select an Evaluation Committee for this solicitation to thoroughly review and score all submitted responsive and responsible proposals. Each evaluator will have the ability to award up to one hundred (100) points, based on the Evaluation Criteria, per submission.

3.13 **EVALUATION REVIEW:** Knox County reserves the right to use all pertinent information (including information learned from sources other than disclosed in the Request for Proposal process) that might affect the County's judgment as to the appropriateness of an award to the best evaluated vendor(s). This information may be appended to the proposal evaluation process results. Information on a service provider from reliable sources, and not within the service provider's proposal, may also be noted and made part of the evaluation file. Knox County shall have sole responsibility for determining a reliable source. Knox County reserves the right to conduct written and/or oral discussions/interviews after the proposal closing. The purpose of such discussions/interviews is to provide clarification and/or additional information to make an award that is in the best interest of Knox County.

3.14 **EXCEPTIONS TO SPECIFICATIONS:** Vendors taking exception to any part or section of these specifications shall indicate such exceptions on their submittal. A failure to indicate any exception(s) shall be interpreted as the vendor's intent to fully comply with the specifications as written. Conditional or qualified offer are subject to rejection in whole or in part. Any exceptions shall be included in Section V, Tab VIII of the submittal. **Do not strike through or in any other way alter the Request for Proposal. Exceptions listed within other sections of the submittal shall not be reviewed or considered.**

3.15 **GRANT FUNDING:** The products or services being procured under this solicitation are being funded by Federal Grant money. All awarded vendors will be required to adhere to Exhibit A of this solicitation in the performance of the Contract.

3.16 **GRATUITIES AND KICKBACKS:** It shall be a breach of ethical standards for any person or company to offer, give, or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim, or controversy or other particular matter, pertaining to any program requirement of a contract or subcontract or to any solicitation or proposal therefore. It shall be a breach of ethical standards for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or a person associated therewith, as an inducement for the award of a subcontract or order. Breach of the provisions of this paragraph is, in addition to a breach of this Contract, a breach of ethical standards which may result in civil or criminal sanction and/or debarment or suspension from being a contractor or subcontractor under Knox County contracts.

3.17 **IDENTIFICATION:** Employees of the Contractor shall have proper photo identification displayed at all times while on property belonging to Knox County.

3.18 **INSURANCE:** The successful vendor(s) must carry the insurance as indicated on the Insurance Checklist Attachment hereto. As proof of the vendor's willingness to obtain and maintain the insurance, the vendor must complete, sign and have its insurance agent sign the attachment and submit it with the proposal. Upon the Notification of Intent to Award, the successful vendor will be required to submit a Certificate of Insurance (COI) including any corresponding endorsement page(s) with the specified coverage and listing Knox County as an additional insured. It shall be the successful vendor's responsibility to keep a current COI and endorsement page(s) on file with Knox County Procurement for as long as the contract is in effect.

3.19 **INTERPRETATION:** No oral interpretation will be made to any vendor regarding the meaning of specifications or the Scope of Work. All questions are to be submitted in writing via email and will be answered in the form of an addendum to the solicitation by the Knox County Procurement Division, if applicable.

3.20 **INVOICE DETAIL:** Knox County is requesting invoices to show the following detail to help expedite review and payment. The Contractor(s) may be required to modify invoicing procedures to show the detail. All potential Contractors are hereby cautioned that Knox County will only pay from original invoices and not facsimiles or copies. Invoices which do not adhere to these details may be returned to the Contractor for correction.

3.20.1 The invoice must show the amount due to the Contractor by Knox County;
3.20.2 The invoice must show a summary of completed work;
3.20.3 Invoices are to be original and uniquely pre-numbered;
3.20.4 Invoices which do not show this information are subject to rejection.

3.21 **INVOICING PROCEDURES:** Knox County requests that invoices be easy to read and understand. Invoices are to be original and uniquely pre-numbered. There shall be no additional charge for this information and these procedures to be included. Each invoice shall include a summary of service(s) provided and shall list the associated unit price. Supporting documentation shall be included with invoices as applicable. Invoices without this information will be returned to the Contractor for correction.

Invoices shall be sent to the billing address indicated on the Purchase Order. Each department or division of Knox County is responsible for its own budget. Departments cannot charge or pay bills for another department. Therefore, it is critical that the successful Contractor's invoices specify the correct department. Do not credit payments to another department's account. Invoices must be submitted in triplicate and must match the corresponding Purchase Order number. There shall be no component billing. Mail invoices for Knox County Schools to:

Knox County Schools Finance Department
Post Office Box 2188
Knoxville, TN 37902-1805
invoices@knoxschools.org

3.22 **INVOICE REVIEW:** Knox County shall review all invoices for adherence to the terms and conditions of the Contract. Variations from the Contract and Contract pricing are strictly prohibited. Any variance found on the invoice will result in rejection of that invoice. Rejected invoices will be returned to the Contractor(s) for correction. Repeated variations may result in termination.

3.23 MINIMUM QUALIFICATION EXPECTATIONS:

3.23.1 Respondent must address all submittal requirements as defined under Section IV.

3.23.2 Respondent shall have a minimum of five (5) years of experience and sufficient capabilities to carry out the work contemplated, as well as the equipment and personnel available for the work.

3.23.3 If the respondent has a permanent office in Knox County, respondent must have a current business license issued by Knox County.

This requirement also applies to any of the Respondent's proposed subcontractors or subconsultants with a permanent office in Knox County. A Knox County business license is not required of any Respondent or proposed subcontractor or subconsultant who does not have a permanent office in Knox County. For more information, contact the Knox County Clerk's office at 865.215.2392.

3.24 NEGOTIATION: Knox County may select a successful proposer on the basis of initial offers received without discussions. Therefore, each proposal shall contain the proposer's best terms from a cost or price and service standpoint. Knox County reserves the right to enter into Contract negotiations with the highest-rated proposer. If Knox County and the selected proposer cannot negotiate a successful agreement, Knox County may terminate said negotiations and begin negotiations with the next highest-rated proposer. Knox County retains the right to negotiate with multiple proposers simultaneously. This process will continue until an agreement has been reached or all proposers have been rejected. No proposer shall have any rights against Knox County arising from such negotiations.

3.25 NEWS RELEASES BY VENDORS: As a matter of policy, Knox County does not endorse the services of a Contractor. A Contractor will not make news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County.

3.26 NO CONTACT POLICY: After the date and time that the vendor receives this solicitation, any contact initiated by any proposer with any Knox County representative, other than the Procurement Division representative listed herein, concerning this Request for Proposal, is strictly prohibited. Any such unauthorized contact may cause the disqualification of the proposer from this procurement transaction.

3.27 OFFER WITHDRAWAL: No proposal can be withdrawn after it is filed unless the proposer makes a request in writing to the Knox County Procurement Division prior to the time set for the closing of proposals or unless the County fails to accept within one hundred twenty (120) business days after the date fixed for the closing the Request for Proposal.

3.28 ORAL PRESENTATION/INTERVIEW: Knox County may require proposers to give oral presentations/interviews in support of their proposal or to exhibit or otherwise demonstrate the information contained therein. These presentations/interviews may be conducted virtually through video conferencing or in person.

Knox County reserves the right to request oral presentations and/or interviews during the initial evaluation phase. The County also reserves the right to complete the initial evaluation phase and then request oral presentations and/or interviews from all proposers or the highest rated proposers. In this case, the evaluations may be revised based on additional information received during presentations.

3.29 PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of thirty-six (36) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

3.30 **PROPOSAL CONTENT:** The proposer's response must contain a thorough description of the background of the proposer and sufficient evidence showing that the proposer is capable of providing the services. The proposer's response must thoroughly expound on the proposer's understanding of how the proposed services will meet Knox County's needs. The proposal must also contain an explanation of the implementation plan and the proposer's ongoing commitment to service.

3.31 **PROPOSAL EVALUATION:** In evaluation of submitted proposals, Knox County reserves the right to use any or all of the ideas from the proposals submitted without limitation and to accept any part or the entire successful proposal in selecting an operation which is judged to be in the best interest of Knox County. All material submitted becomes property of Knox County.

3.32 **PROPOSAL FORMAT:** This solicitation is in the Request for Proposal format. As the specified date and time, each proposer's name will be publicly read aloud. No further information will be given at that time. Evaluation of the proposals will proceed as expeditiously as possible and successful, as well as unsuccessful, notification will be given.

3.33 **PROPOSER OBLIGATION:** Proposers shall become fully acquainted with conditions relating to the scope of the work detailed in this Request for Proposal. Failure to become acquainted with the existing conditions shall in no way absolve the proposer of any obligations with respect to this Request for Proposal or the Contract.

3.34 **PUBLIC RECORDS ACT:** Knox County is subject to the Tennessee Open Records Act 10-7-503 et seq. Proposers are cautioned that all documents submitted on behalf of this Request for Proposal shall be open to the public for viewing and inspection.

3.35 **QUANTITIES:** Knox County does not guarantee any quantity of services will be utilized under this solicitation. Services will be utilized on an as needed basis.

3.36 **REJECTION OF PROPOSALS:** Knox County reserves the right to reject any and all proposals received as a result of this request and to waive any informality, technical defect or clerical error in any proposal, as the interests of Knox County may require. Non-acceptance of any proposal will be devoid of any criticism of the proposal and of any implication that the proposal is deficient in any manner. Non-acceptance of any proposal shall be construed as meaning simply that the County does not deem the proposal acceptable or that another proposal was deemed more advantageous to Knox County for the particular services proposed.

3.37 **REMOVAL OF CONTRACTOR'S EMPLOYEES:** Contractor agrees to utilize only experienced, responsible and capable people in the performance of the work. Knox County may require that the Contractor remove from the job covered by this Contract, including employees who endanger persons or property or whose continued employment under this Contract is inconsistent with the interest of Knox County.

3.38 **SUBMIT QUESTIONS:** Prospective proposers may submit questions concerning this solicitation until **September 26, 2025 at 4:30 p.m. local time**.

3.39 **SUSPENSION AND DEBARMENT:** Vendor will notify Knox County Government if they become suspended, debarred, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities during the term of this proposal and during the term of any subsequent Contract for service.

3.40 **TENNESSEE REGISTRATION:** The successful proposer must meet any applicable State of Tennessee registration requirements.

SECTION IV SCOPE OF WORK

4.1 **BACKGROUND:** Knox County Schools (KCS) is a public education agency. It is responsible for the education of children from preschool through high school. There are approximately fifty-nine thousand (59,000) Pre-K through 12th-grade students and approximately seven thousand eight hundred (7,800) employees. For purposes related to this RFP, the district is comprised of ninety-two (92) schools that represent urban, suburban, and rural populations.

4.2 **FACILITIES & EQUIPMENT:** All facilities for training in Knoxville, TN will be provided by Knox County Schools. Upon request, Knox County will provide a computer and projection system, with accommodations for trainers to use their own computers.

4.2 **PARTICIPANTS:** The number of participants may vary. Vendors may work with an entire school/department staff, smaller school content teams and/or district teams, individuals, or any combination thereof. A defined number of training sessions or participants is not guaranteed. Participants will be staff members serving our students.

4.3 **PROGRAM CONTENT & METHODOLOGY:** Knox County Schools is seeking vendors to partner with our schools and district to provide high quality, rigorous academic programming for 9th through 12th grades which prepares our students to be successful in their next phase of life. The program must promote academic excellence and equity in the Early Postsecondary Opportunities, (EPSO), as listed on the Tennessee Department of Education website and listed in the Ready Graduate and/or College and Career Readiness accountability indicator.

More information on EPSO can be found at the following link: https://www.tn.gov/education/students/early-postsecondary.html

The Advanced Academics organization should provide a comprehensive program to include courses/curricular frameworks, assessments, services and supports that provide opportunities for students to demonstrate college and career readiness and have the potential to earn postsecondary credit. The curricular program should be of high-quality which includes discipline specific critical thinking, inquiry, reasoning and communication skills. The programming of the courses should support and encourage learner potential by challenging students to inquire skillfully, think critically, and reflect meaningfully. Students should have the opportunity to engage in learning across all content areas with an informed curiosity that will equip students to be successful in their future endeavors. These areas must be inclusive of, but not limited to: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education Fields, and Sciences. Programs must also offer courses individually and as a full diploma package. Upon completion of the learning, students should have the opportunity to demonstrate their mastery with a rigorous assessment that could culminate in credit through academically competitive colleges and universities.

The program must have or be actively in the process of developing a clear scope and sequence of support through its framework for instruction for students and teachers to identify and prepare students with potential in earlier grades (prior to the 9th grade), so schools can increase the percentage of KCS students in advanced coursework. Proposers must provide a comprehensive narrative statement detailing the scope and sequence of support utilized. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.

The program additionally should include services and supports for school and district staff that will prepare them to facilitate student progress in the program. Professional learning and training should include teachers as well as other staff members and administrators for schools and the district. The vendor must provide sustainable professional development through in-person trainings, with options for virtual meetings/trainings or video resources. There should also be teacher support materials provided digitally and/or in person which support the academic rigor of the program.

4.5 **DELIVERY OF SERVICE:** Proposers must provide comprehensive narrative statements that outline the implementation plan for their program. The implementation plan should clearly support, streamline and provide accountability for the identified deliverables. This plan may include operational recommendations for KCS that will improve the efficiency and efficacy of the program.

The program deliverables include:

- Supports for student content and skill development beginning minimally in the 9th grade.
- Alignment with Early Postsecondary Opportunities (EPSO).
- Opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit through both individual and full diploma package courses with rigorous assessments that may culminate in postsecondary credit, aligning with university admissions guidelines;
- Courses/curricular frameworks for multiple content areas including Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences with discipline specific critical thinking, inquiry, reasoning and communication skills.
- A scope and sequence of support, either in place or in development, utilized to identify student potential prior to the 9th grade that can increase the percentage of students in underserved populations in advanced coursework.
- Services and supports that prepare school and district staff to facilitate student progress in the program through in-person trainings with options for virtual meetings/training and video resources.

- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

4.6 **EXPERIENCE:** Proposers are to detail their organization's previous experience working with schools, districts, states, and/or countries to promote high levels of academic rigor for all learners which results in the opportunity to earn postsecondary credit. For applicable team members, proposers are to submit education credentials and relevant work experience that supports the program sought by this RFP. This information is to be submitted in Section V, Tab V of the Proposal.

Proposers must provide three (3) references relating to work of a similar scope completed within the last five (5) years. Include the name of the agency or institution, point of contact with both a telephone number and email address, and the nature and size of the Contract. **Do not list Knox County Government or Knox County Schools as a reference.** References shall be submitted on Attachment B of this RFP.

SECTION V PROPOSAL FORMAT

PROPOSAL INFORMATION: The following guidelines should be followed when responding to the Request for Proposal. Negligence in adhering to the criteria listed below will be considered when reviewing the responses and evaluating the proposers. Knox County reserves the right to reject any proposal for failure to comply with the requested response specifications. The County reserve the right to amend the Request for Proposal by addendum prior to the final date of proposal submission.

- Knox County requests proposals be in sufficient detail to address all requirements.
- The County requests responses be submitted in a three-ring binder containing sections separated by tabs. Do not submit spiral bound or glued responses.
- Please submit one (1) marked original and one (1) exact copy.
- Page numbers should be placed on the bottom center of pages.
- Proposers shall also submit an exact copy of the original proposal on a Flash drive. **This shall be in one (1) complete pdf file. Do not include multiple folders on the Flash drive.**

PROPOSERS MUST HAVE THEIR BINDERS IN THE EXACT FORMAT LISTED BELOW.
Each proposal must address all questions/statements listed in each tab completely.

TAB I COVER LETTER

Include cover letter authorizing the submission of the proposal signed by the principal of the company.

TAB II COMPANY PROFILE

- Company Name, Address Telephone/Fax numbers
- Contact name(s) and information
- Proposer's Vendor Number as assigned by Knox County
- Employer Identification Number (EIN)
- Knox County Business Tax License for Organization (if applicable)
- Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)
- Will you accept E-commerce for payment as detailed in Section 1.14?
- Acknowledgement of the receipt of any Addendum issued

TAB III PROGRAM CONTENT & METHODOLOGY (30 Points)

Proposers must demonstrate an understanding of Knox County's needs and fully explain their overall approach to meet the County's requirements. This must thoroughly describe how the proposed services will meet the requirements outlined in Section 4.4. Proposer must clearly address the following:

- Describe how the program aligns with Early Postsecondary Opportunities (EPSO).
- Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit.
- Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills.
- Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered.
- Describe the courses that are offered individually as well as those that are offered as a full diploma package.
- Outline the assessment process(es) and opportunities to earn college/university credit.
- Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.
- Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program
  - Detail the professional development models available and teacher support materials associated with the program.
- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

TAB IV **DELIVERY OF SERVICES (30 POINTS)**

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule.

- Courses/curricular frameworks for multiple content areas;
- Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines;
- Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;
- Training and/or professional learning offerings about the services and supports included in the program; and
- Supports for student content and skill development beginning minimally in the 9th grade.
- Proposers do not have to provide complete curriculum. Samples are sufficient.

TAB V **EXPERIENCE AND REFERENCES (20 Points)**

Proposers are to detail the Company's experience relating to the services requested in this RFP, specifically:

- Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s).
- Proposers must describe the organization's experience with similar projects.
- Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP. Information about each person listed should include their a) title b) resume, including advanced education credentials, relevant work experience, demonstrated outcomes, independent research, and publishing in the subject areas addressed by this RFP, as applicable c) number of years with the organization and d) description of the type of work the individual will perform
- References (Attachment B)

TAB VI **PROPOSED COSTS (20 Points)**

Costs proposals must include all direct and indirect costs associated with the performance of the service. Proposed costs should be inclusive of all expenses. Proposer may include the methodology used to determine their proposed cost. Pricing must include all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. There will be no reimbursement for any such charges.

Per Attachment A, please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- Annual Candidacy/Membership Fees
- School Application Fees
- Annual Program or Curriculum Fees
- Curricular Materials
- Exam Fees
- Professional Development (inclusive of materials and travel expenses, as applicable)
  - o On-Site Format
  - o Webinar/Virtual Format
- Other Expenses
- Optional Features/Add-Ons

NOTE: This tab shall only be included in the original document and the exact electronic version. This tab is to be submitted under separate cover from the other parts of the vendor's proposal. This tab will be reviewed after the other sections of the vendor's proposal have been reviewed and scored.

TAB VII **OTHER INFORMATION**

Proposers may include any other information deemed pertinent to this solicitation.

TAB VIII **EXCEPTIONS**

Please note any and all exceptions taken to any part this Request for Proposal. If none are taken, please clearly state so. Do not mark through or otherwise alter the language of this RFP in your response.

TAB IX **ATTACHMENTS**

- Pricing (Attachment A)
- Insurance Checklist (Attachment C)
- Criminal History Check Affidavit (Attachment D)
- Iran Divestment Act (Attachment E)
- General Federal Funding Requirements (Exhibit A)

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$_____per school Notes:
Application Fees	$_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes:
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students:
Exam Fees	$_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site • Webinar/Virtual
Other Expenses:	
Optional Features/Add-ons:	

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: _____

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident) $1,000,000 BODY INJURY (Per–Person) BODY INJURY (Per-Accident) PROPERTY DAMAGE (Per-Accident
YES	4.	COMMERCIAL GENERAL LIABILITY	LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE $ 1,000,000
			FIRE LEGAL LIABILITY $ 100,000
			MED EXP (Per person) $ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY $ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE $ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE $ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2.000.000 ANNUAL AGGREGATE
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000
NO		PROFESSIONAL LIABILITY	
NO NO NO NO	10.	ARCHITECTS &ENGINEERS ASBESTOS & REMOVAL LIABILITY MEDICAL MALPRACTICE MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM $2,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)
NO	13.	MOTOR CARGO INSURANCE	
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$
NO	17.	DISHONESTY BOND	$
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.
NO	19.	USL&H	FEDERAL STATUTORY LIMITS

20. Carrier rating shall be Best's Rating of A-VII or better or its equivalent.

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.

23. Certificate of Insurance shall show the RFP number and title.

Insurance Agent's Statement and certification: I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.

Agency Name: _____Authorizing Signature: _____

Proposer's Statement and Certification: If awarded the Contract, I will comply with the Contract insurance requirements.

Proposer's Name: _____Authorizing Signature: _____

ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, _____, president or other principal

Officer of _____, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

_____
President or Principal Officer

For: _____
Name of Company

STATE OF TENNESSEE}
COUNTY OF }

Subscribed and sworn before me by _____,

President or principal officer of _____,

On this _____ day of _____ 2_____.

_____
Notary Public

My Commission expires: _____

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying,'' in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

OFFICE OF COUNTY MAYOR GLENN JACOBS

Procurement Division, 1000 N. Central Street, Suite 100, Knoxville, TN 37917

ADDENDUM I
REQUEST FOR PROPOSAL 3688
ADVANCED ACADEMIC PROGRAMS

ADDENDUM DATE: September 30, 2025

BUYER: Jay Garrison, CPPO, CPPB

ORIGINAL CLOSING DATE: October 14, 2025 at 2:00 PM

THE FOLLOWING IS TO BE AMENDED:

ATTACHMENT A, COST, WILL BE DELETED AND REPLACED WITH A NEW COST SHEET. SEE ATTACHED. FAILURE TO PROVIDE THE REVISED COST SHEET AND ALL REQUIRED ITEMS WILL BE JUST CAUSE TO DEEM YOUR SUBMITTAL AS NONRESPONSIVE.

SECTION 3.4 SHALL BE AMENDED TO THE FOLLOWING:

AWARD LENGTH: Knox County intends to issue a one (1) year award with an option to renew upon consent of both Knox County and the awarded Contractor. This term bid agreement may be renewed for an additional four (4) years, one (1) year at a time for a possible total of five (5) years. Knox County reserves the right to revoke the award if a pattern of unavailability arises with the successful proposer(s).

SECTION 3.29 SHALL BE AMENDED TO THE FOLLOWING:

PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of twelve (12) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

THE FOLLOWING IS FOR CLARIFICATION:

QUESTION 1: Could you please clarify whether the accrediting organization that issues any certifications to students must be Tennessee-based, or if national accreditation is acceptable?

ANSWER 1: National accreditation is acceptable.

QUESTION 2: We understand that Knox County intends to draft the contract. As a global provider of specialist exam services, we typically begin with a bespoke contract template that includes essential terms specific to our services—such as exam security protocols—which may not be covered in a standard agreement. This template has been successfully used as a starting point with many U.S. districts. For efficiency during the contracting phase, would Knox County be amenable to reviewing and potentially using our template as the basis for the agreement?

ANSWER 2: The County's Contract will take precedence over all other Contract documents. Proposers may submit a separate document with other terms and conditions, however, conflicting terms and conditions between the County's Contract and any other agreement will be governed by the County's Contract.

QUESTION 3: The RFP references Exhibit B as a sample contract, but it appears to be missing from the document. Could you kindly provide a copy?

ANSWER 3: See attached.

QUESTION 4: The RFP requests fixed pricing for the initial 36-month term. We typically offer fixed pricing with an annual inflationary adjustment. Could you advise on how Knox County would prefer suppliers to address inflationary increases in their proposals?

ANSWER 4: Knox County is amending this requirement to require fixed pricing for a period of 12 months from the date of contract commencement. No cost increases will be granted during any term of the contract.

QUESTION 5: Could you please clarify what is meant by "unit price" in this context? Is it intended to refer to pricing per student, per exam, per school, or another metric?

ANSWER 5: This requirement has been amended per the revised Cost sheet. See attached.

QUESTION 6: We have reviewed the Appendix C insurance requirements. Because we are an entity headquartered in the UK, we may not be able to comply with all of these requirements. Where we may need derogations e.g. it may not be possible to name you as an additional insured, how should we indicate this?

ANSWER 6: This requirement cannot be waived. The County must be named additionally insured on the policy. Upon a notice of award to a proposer(s), the successful proposer(s) will be required to submit a current Certificate of Insurance along with all endorsement pages naming Knox County as additionally insured.

QUESTION 7: Do you want us to list all the AP courses that Knox has currently bought from us?

ANSWER 7: No. This is a new, standalone solicitation and previous experience with Knox County will not be considered.

QUESTION 8: In regards to samples, we were going to send one copy of each course student edition. Do you require digital access as well?

ANSWER 8: Digital access is not required, but acceptable.

QUESTION 9: Would the district consider an all-digital platform to fulfill this RFP's scope of work?

ANSWER 9: No. The County will not accept an all-digital platform.

QUESTION 10: Can the curriculum be supplemental to the courses or must it be core curriculum?

ANSWER 10: The curriculum can be supplemental.

End of addendum.

Jay Garrison, CPPO, CPPB
Procurement Coordinator

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost.
- Digital resources that the teachers and/or students would need to fully implement the program.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost).
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost).
- Software Services

Total cost for the scenario: $_____

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

Exhibit B

Knox County Government

and

(Contractor)

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and (Contractor), hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. Terms of this Contract. This Contract commences on the 1st day of December 2025 and ends the 30th day of November 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. The County intends to issue a one-year (1) award. Upon the mutual agreement of the vendor and the County, the award may be extended for four (4) additional years, one (1) year at a time. This may result in a total of five (5) years. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. Subcontracting/partnerships: Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. Payment. Contractor warrants that the pricing shall remain firm for the initial one (1) year period. At the end of the first one (1) year period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a

SAMPLE

Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. Right to inspect. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. Nondiscrimination and non-conflict statements. Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. Books and records. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding

of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the

SAMPLE

Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, Terms and Conditions, etc., for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____

BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**

MAYOR – Signature **MAYOR**

Date:_____

SAMPLE

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO._____
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

_____
LAW DIRECTOR – Signature

_____
LAW DIRECTOR – Printed Name

Date:_____

CONTRACTOR

_____
AUTHORIZED SIGNATURE

_____
CONTRACTOR – Printed Name

(CONTRACTOR)
COMPANY NAME

Date:_____

SAMPLE

Original with Pricing

BFW Publishers

Knox County

October 14, 2025

Advanced Academics Program
RFP #3688

BEDFORD, FREEMAN & WORTH PUBLISHING GROUP, LLC
120 Broadway | New York, NY 10271 | 855 858 4774

bfwpub.com/high-school/us

Tab I - Cover Letter

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Cover Letter

October 1, 2025

Dear Knox County Procurement Divison:

Bedford, Freeman & Worth Publishing Group LLC (BFW) is committed to providing the best service and support to Knox County in regards to your RFP #3688 - Advanced Academics Program. We offer a **comprehensive AP® program** that includes courses and curricular frameworks, assessments, services, and ongoing support. Our program empowers high school students to demonstrate **college and career readiness** while earning post-secondary credit across a wide range of disciplines. Every component is fully aligned with **College Board Standards** and offers **100% CED framework alignment down to the topic level**.

BFW publishes course materials for grades 9-12 in the following areas:

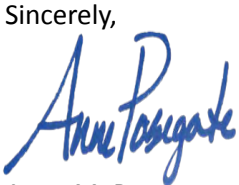
Math: AP® Statistics, AP® Calculus (AB and BC), on-Level Statistics, AP® Pre-Calculus (2027).
English Language Arts: AP® Language, AP® Literature, on-Level English, Honors English.
Science: AP® Environmental Science, AP® Physics 1&2, AP® Biology, Honors Chemistry, AP® Chemistry (2027).
Social Studies: AP® Human Geography, AP® World History, AP® US History, AP® European History, AP® Psychology, AP® U.S. Government, AP® Economics (Micro and Macro), AP® African American Studies, AP® Comparative Government, on-level Psychology.
CTE: AP® Business Principles and Personal Finance (2026).

Our materials offer a **seamless balance of print and digital learning**, giving educators the flexibility to teach in the way that best fits their classrooms. With **unique print resources** that support hands-on engagement and **digital resources available through our Achieve platform**, students gain access to interactive practice, assessments, and personalized learning tools. This combination ensures that every learner can connect with the content, while educators benefit from data-driven insights and time-saving instructional support.

We have created a custom product portal for you at https://collections.bfwpub.com/collections/68d56a0994820167bf27614e?utm_source=Paperflite%20Link.

We fully understand and comply with all scope-of-work requirements outlined in the request for proposal, and have provided detailed responses in the accompanying submission. We appreciate the opportunity to present our solution and look forward to the possibility of working together.

Sincerely,



Anne M. Postgate
Director, Bids & Contracts

120 Broadway, 25th Floor · New York, NY 10271 · O: 855.858.4774 · F: 540.672.7542 · adoptions@bfwpub.com · highschool.bfwpub.com

Tab II - Company Profile

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Company Profile

Company Name, Address Telephone/Fax Numbers

Bedford, Freeman and Worth Publishing Group LLC (BFW) is owned by Macmillan Holdings LLC, a private limited liability corporation headquartered in New York. Macmillan Holdings is a company in the portfolio of Verlagsgruppe Georg Von Holtzbrinck GmbH of which Dr. Stefan Von Holtzbrinck is the Chairman of the Board and majority owner. Verlagsgruppe Georg Von Holtzbrinck GmbH has significant holdings in the science, education, technology and publishing markets across North America and Europe. Beyond Macmillan Holdings, Verlagsgruppe Georg Von Holtzbrinck GmbH also owns Macmillan's trade publishing division as well as other global education businesses. Orders will be fulfilled by MPS (Macmillan Publishing Services), another division of Macmillan Holdings LLC located in Gordonsville, VA. The warehouse is located at 16365 James Madison Highway, Gordonsville, VA 22942.

Purchase orders can be submitted to highschool@mpsvirginia.com. Payment remittance can be sent to: Macmillan Holdings LLC dba Holtzbrinck Publishers LLC, Attention: 10306000, Dept CH 17571, Palatine, IL 60055-7571.

Our high school catalog can be found at https://www.bfwpub.com/high-school/ca.

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Executive Sales Representative
314.402.5103, cbleyer@bfwpub.com

Proposer's Vendor Number as assigned by Knox County 75694
Employer Identification Number (EIN) 13-4047598
Knox County Business Tax License for Organization (if applicable) N/A
Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable) N/A
Will you accept E-commerce for payment as detailed in Section 1.14? Yes.
Acknowledgement of the receipt of any Addendum issued - Yes, we received Addendum #1 on 9/30/2025.

Tab III - Program Content & Methodology

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Program Content and Methodology

Bedford, Freeman & Worth Publishing Group (BFW) brings together three distinguished publishing houses—**Bedford/St. Martin's, W.H. Freeman, and Worth Publishers**. Unlike many publishers, BFW is a **privately owned company** with more than 64 years of experience in publishing, including over 44 years serving the high school market. We take pride in our rich publishing history, our strong focus on customers, and our commitment to supporting teaching and learning.

Our **authors are leaders in their fields**: Nobel Prize winners, award-winning novelists, and pioneering researchers. Many are also college professors and AP® teachers who contribute daily to classrooms just like yours. In addition to being highly regarded in their disciplines, they are active participants in AP® communities and recognized authorities on AP® courses. Unlike many competitors in the high school marketplace, BFW is an **author-driven house**. We do not rely on independent "packagers" to create content. Instead, we partner directly with nationally recognized college professors—experts with doctorates and the most up-to-date research knowledge—working alongside high school teachers recognized by the College Board as content specialists. This collaboration ensures that our texts are both **academically rigorous and pedagogically appropriate** from the start.

Every project undergoes a **rigorous development and review process**, supported by our editorial team and a carefully selected **Content Advisory Board**. Manuscripts are shaped by extensive feedback from educators, developmental editors, and subject-matter experts, ensuring accuracy, clarity, and the right tone for the intended audience. Frequent collaboration between authors and editors integrates market insights and ensures content remains relevant. During production, our manuscripts undergo **multiple layers of quality control**. Expert copy editors and proofreaders carefully review every line against established style and grammar standards (Chicago Manual of Style or MLA), ensuring accuracy and consistency. By the time a work reaches publication—after a development process that can span 2 to 10 years—most issues have been fully debated and resolved. In cases where final content decisions are required, we defer to our **authors' expertise**, reflecting our deep trust in the scholars and teachers who craft our texts.

At BFW, we share the conviction that what happens in the classroom matters. A great teacher, a strong classroom community, and superior content have the power to change the world—**one student, one idea at a time**.

Our materials provide a **flexible balance of print and digital learning**, offering unique resources in both formats. Teachers can choose the model that best supports their classroom needs—**print-only, digital-only, or a hybrid of both**. No matter the format, each option delivers the complete set of resources students and teachers need to successfully master the course.

Achieve is our all-in-one learning platform for both AP® and on-level courses. It supports students before, during, and after class with interactive tools, assessments, and an accessible eBook featuring highlighting, note-taking, read-aloud, and offline access. Teachers benefit from a rich suite of resources—pacing guides, standards correlations, rubrics, videos, and more—making it easy to save time and personalize instruction.

We also provide seamless **courseware integrations** for Achieve through LTI link, Clever, and ClassLink, with full rostering and SSO capabilities.

Requirements

Describe how the program aligns with Early Postsecondary Opportunities (EPSO).	BFW's AP SS resources align directly with Tennessee's EPSO by providing rigorous, College-Board aligned content and skill development that prepares students for AP exams. Since AP is a recognized EPSO pathway, these resources can help students earn early college credit, build transferable academic skills, and meet the state's Ready Graduate benchmarks. BFW's Achieve digital supports and teacher resources ensure equitable access and sustained success in EPSO courses across the district.

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Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit.	While our AP courses are academic in focus, BFW's AP resources foster the disciplinary skills, digital literacy, and analytical habits that employers and postsecondary institutions identify as essential for workplace success (e.g., time management, independent learning, critical thinking and problem solving, communication and collaboration, argumentative writing, data analysis, applying reasoning to real-world civic/global issues, and presentation of evidence).
Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills.	Our content is scaffolded to help students build the analytical reading, evidence-based writing, and critical thinking skills emphasized as indicators of college readiness.
Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered.	We offer high school courses in the following subjects: • Math: AP® Statistics, AP® Calculus (AB and BC), on-Level Statistics, AP® Pre-Calculus (2027). • English: AP® Language, AP® Literature, on-Level English, Honors English. • Science: AP® Environmental Science, AP® Physics 1&2, AP® Biology, Honors Chemistry, AP® Chemistry (2027). • Social Studies: AP® Human Geography, AP® World History, AP® US History, AP® European History, AP® Psychology, AP® U.S. Government, AP® Economics (Micro and Macro), AP® African American Studies, AP® Comparative Government, on-level Psychology. • CTE: AP® Business Principles and Personal Finance.
Describe the courses that are offered individually as well as those that are offered as a full diploma package.	All of our AP courses are offered individually.
Outline the assessment process(es) and opportunities to earn college/university credit.	All of our AP courses give students the chance to tackle college-level work while they are still in high school and earn college credit and placement.
Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.	To expand access to advanced coursework, BFW's AP resources and supports can be introduced through a deliberate scope and sequence that starts in middle school. This allows schools to identify students' potential early, provide scaffolding, and ensure that a greater percentage of underserved students are prepared for and encouraged to enroll in AP courses in high school. Schools can use teacher input, middle school benchmarks, state assessments, and literacy data to identify students who show aptitude in reading, critical thinking, and analysis. Providing professional learning and clear rubrics can help teachers recognize AP potential in students beyond traditional test scores, reducing a potential barrier for underserved groups. Our instructional model emphasizes reading primary/secondary sources, evidence-based writing, and data analysis, skills that can be introduced in 7th and 8th grade classes
Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program	We offer gratis support throughout the length of your commitment to all administrators, teachers, students. Our BFW High School support portal provides 24/7 help to teachers, parents and students via a Knowledge Base (searchable by role, products, topic and features) as well as real-time email and phone support options (8AM to 3AM (ET) M-TH; 8AM to 12AM (ET) FRI; 12AM to 8PM (ET) SAT; and 12PM to 3AM (ET) SUN. For instructors and administrators, our online High School Teaching Community provides free access to premium content including course tours, professional development, webinars on demand, valuable teaching resources, and curriculum and state-focused sub-communities.
Detail the professional development models available and teacher support materials associated with the program.	Please refer to our included PD brochure for further information.
Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.	Please refer to the attached training example.

With every commitment, we deliver not only a premier product and exceptional user experience, but also **unrivaled support**—including implementation, integration, end-user support, training, and ongoing product maintenance and upgrades—all at no additional cost.

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

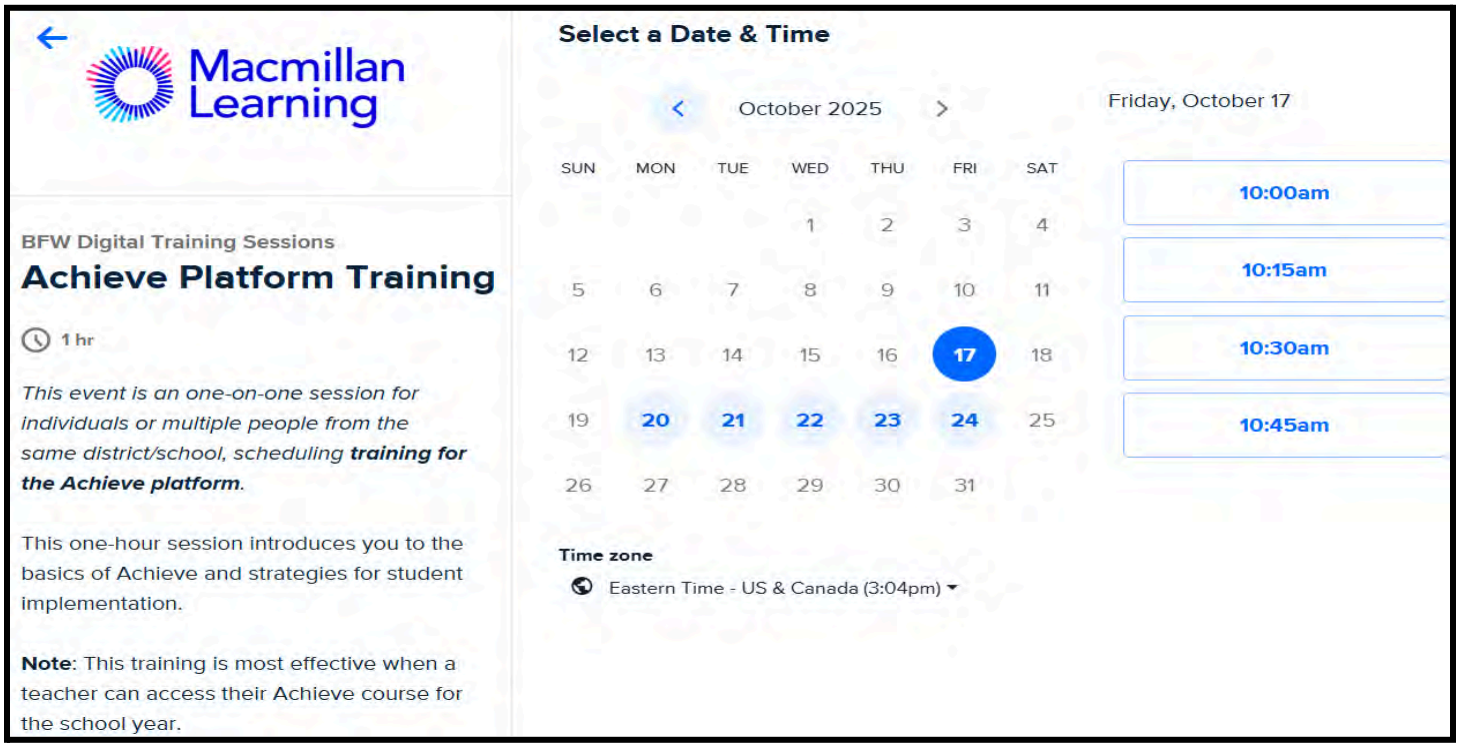
Training Example

Question: Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

Our research suggests that effective training contributes to teacher satisfaction and improved student outcomes. To that end, we offer various ways to learn about our materials upon adoption. Options include:

- Live "implementation training" where we walk you through the components of the program in real time. These sessions could be led by the rep, sales specialist and/or the customer experience associate. Implementation training agenda (https://docs.google.com/document/d/1ulC97TKawewO3GmBfS1SbMu9RHCWctP83iNYNJSSjSs/edit?tab=t.0)
- We also offer video recordings (https://www.youtube.com/watch?v=80JIGse7qzQ) of this same kind of walk-through that teachers can do on their own time as independent study.
- We offer live one-on-one training with our Customer Experience team. We have an online scheduler where teachers can book a 60 minute session to get trained on Achieve. Note that this service is free and open for the life of your adoption. Teachers can come back for subsequent training and take as little or as much time within the 60 min as you need.

Online scheduler image:



Our goal is to ensure that all teachers understand the full program, from the student edition (CED alignment, features, pedagogy, etc.) to the comprehensive teacher package, which includes an annotated teachers edition, teacher resources, and test bank. We

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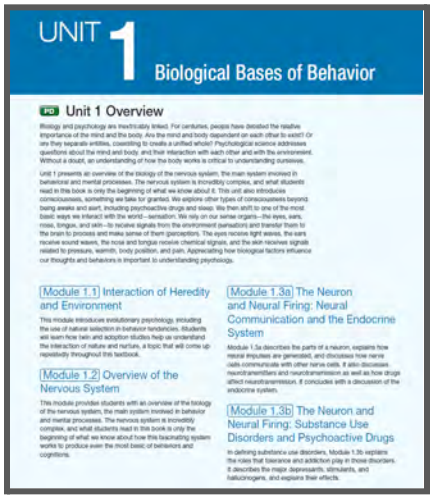
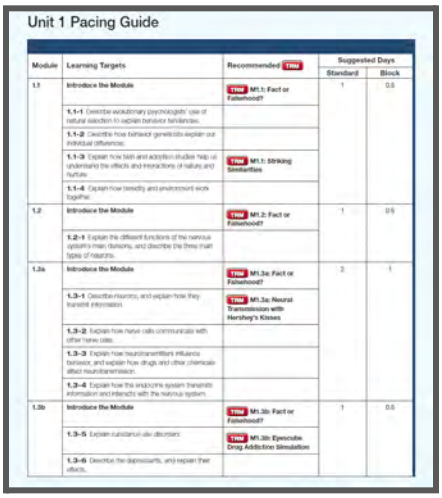
also aim to ensure that teachers fully understand the capabilities of our digital platform, Achieve, and that they know how to use the program with students and for their teacher materials. Some additional resources:

Our **Implementation** website **(**https://go.bfwpub.com/BFW-Achieve-Implementation-Site.html**)** features videos and other helpful information to get started:

- Example of Achieve teacher training video: (https://www.youtube.com/watch?v=_YiCdgGC2eg)
- Testbank training video: (https://www.youtube.com/watch?v=_zpxc-8uM2g)
- Introduction to Achieve for students video (so teachers don't have to train students on how to use the program: (https://collections.bfwpub.com/assets/6841cf4c3ba84a0225b26d30?utm_source=Paperflite%20Link)

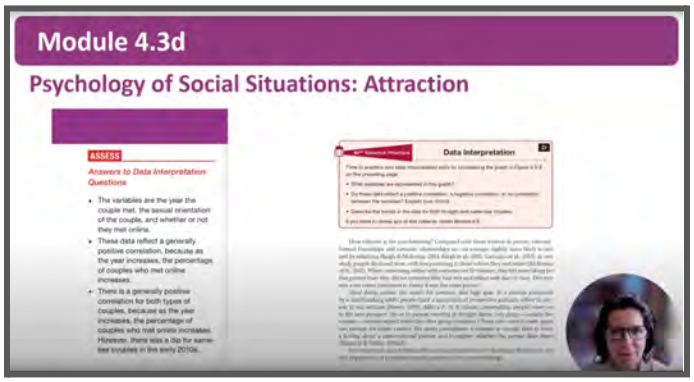
In addition to our implementation training, our individual book programs have materials to help teachers plan and execute the course**.** These include: Teachers editions that include unit or chapter-opening planning pages that provide a summary of the content, highlighting the key concepts students should understand, pacing suggestions, a list of all available teacher resources, correlation to the CED, etc.

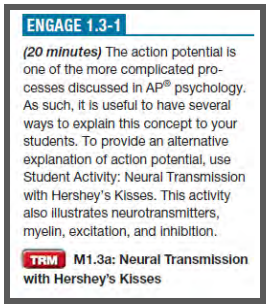


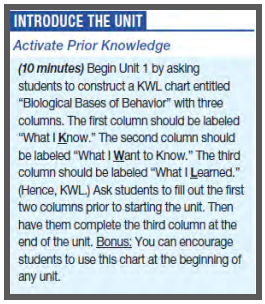


Links in the margins of the teacher's edition lead teachers to professional development videos, and their teacher resources, along with teaching tips:









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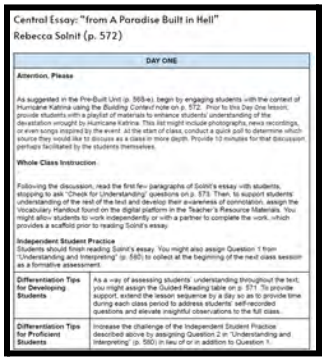
We provide other useful tools, like lesson plans (resources vary by book):



Central Essay: "from A Paradise Built in Hell"
Rebecca Solnit (p. 572)

DAY ONE	
Attention, Please As suggested in the Pre-Built Unit (p. 569-e), begin by engaging students with the context of Hurricane Katrina using the *Building Context* note on p. 572. Prior to this Day One lesson, provide students with a playlist of materials to enhance students' understanding of the devastation wrought by Hurricane Katrina. This list might include photographs, news recordings, or even songs inspired by the event. At the start of class, conduct a quick poll to determine which source they would like to discuss as a class in more depth. Provide 10 minutes for that discussion, perhaps facilitated by the students themselves. **Whole-Class Instruction** Following the discussion, read the first few paragraphs of Solnit's essay with students, stopping to ask "Check for Understanding" questions on p. 573. Then, to support students' understanding of the rest of the text and develop their awareness of connotation, assign the Vocabulary Handout found on the digital platform in the Teacher's Resource Materials. You might allow students to work independently or with a partner to complete the work, which provides a scaffold prior to reading Solnit's essay. **Independent Student Practice** Students should finish reading Solnit's essay. You might also assign Question 1 from "Understanding and Interpreting" (p. 580) to collect at the beginning of the next class session as a formative assessment.	
Differentiation Tips for Developing Students	As a way of assessing students' understanding throughout the text, you might assign the Guided Reading table on p. 571. To provide support, extend the lesson sequence by a day so as to provide time during each class period to address students' self-recorded questions and elevate insightful observations to the full class.
Differentiation Tips for Proficient Students	Increase the challenge of the Independent Student Practice described above by assigning Question 2 in "Understanding and Interpreting" (p. 580) in lieu of or in addition to Question 1.

Additionally, our authors occasionally host professional development webinars on timely topics, such as this one having to do with the new question types for AP Psychology: (https://collections.bfwpub.com/assets/67f936a3c34d2e2ea889a4b1?utm_source=Paperflite%20Link).

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Tab IV - Delivery of Services

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Delivery of Services

Our mission is to support teachers in today's increasingly complex high school environment by fostering a connected community of educators, scholars, authors, and editors, alongside a rich library of teaching and learning resources. To ensure smooth implementation, we follow a **Critical Path Method (CPM)** of project management throughout the contract term, with all steps documented, reviewed, and approved at each milestone. Our standardized onboarding model, designed specifically for the high school market, ensures thorough knowledge transfer. A dedicated team—spanning product, sales, finance, and client support—oversees implementation and ongoing support, leveraging tools such as Salesforce, Desk, Service Cloud, and Google Suite to manage every phase of the project.

To further strengthen classroom success, we provide a **comprehensive professional development series** tailored to educator needs. Upon award, we collaborate with partners to design a custom plan that addresses the full scope of our resources, including onboarding, implementation training, and professional development workshops. These opportunities ensure teachers are fully prepared, confident in using our tools, and equipped with strategies to maximize classroom effectiveness.

Our Professional Development and training sessions provide the tools, support, and opportunity for growth that teachers need to get the most out of their textbook program while maximizing a student's understanding and engagement. That is why we offer a four tiered model of training and professional development customized to the needs of your district and the size of the adoption. It includes:

TIER ONE: COURSE TOURS, CLASSROOM COMPASS, WEBINARS (gratis)
• Course tours are self-paced video programs that provide foundational training on the teacher resources, and the eBook.
• The Classroom Compass is an online community dedicated to bringing teachers together to share tips, discuss strategy, etc.
• BFW hosts several free webinars with our authors, editors, and AP® experts throughout the year. You can attend or watch the posted recording on Classroom Compass.

TIER TWO: PROGRAM OVERVIEW (gratis)
• A BFW representative will lead a walkthrough of a single textbook program including the book, supporting materials and accompanying technology.

TIER THREE: CONTENT WEBINAR (gratis & fee-based depending on course)
• A BFW consultant (an accredited teacher who has used the program, an author, and/or College Board consultant) will provide focused training rooted in the concepts and skills of the course along with targeted tips and advice.

TIER FOUR: VIRTUAL OR ON-CAMPUS WORKSHOP (fee-based)
• Custom designed workshops to meet the needs of your school and your course.
• Our Support team will speak directly with a sample of teachers/district representatives prior to the workshop to determine how to structure it based on your district's unique needs.

Requirements

Courses/curricular frameworks for multiple content areas;	Pacing guides and scope and sequence materials are provided in digital and print form as a part of the TE and TRM.
Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines;	BFW AP Social Studies resources are specifically designed to align with the College Board's AP frameworks. These resources provide rigorous, college-level content and assessments that prepare students for AP Exams which can lead to. postsecondary credit based on student performance and individual university policies. Our materials include a variety of formative and summative assessments modeled after AP exam formats, including multiple-choice questions, document based questions, long essay questions, and short answer questions. These assessments support Knox County's goal of preparing all students for success beyond high school by providing pathways to earn college credit while still in high school. Our instructional supports help teachers implement these resources with fidelity, ensuring students are well-prepared for AP success and aligned with the rigor expected by college admissions offices.

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Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;	Through our professional development series, we offer a variety of professional development opportunities for teachers to increase classroom success, be fully prepared, and have the training needed to increase their teaching effectiveness. Please refer to the included PD brochure for further information.
Training and/or professional learning offerings about the services and supports included in the program; and	Our High School Teaching Community offers free access to resources, professional development, and on-demand webinars, while our 24/7 support portal ensures teachers, parents, and students get real-time help at no extra cost. We also provide AP® Updates to keep educators current with College Board changes.
Support for student content and skill development beginning minimally in the 9th grade.	BFW's programs provide AP-aligned content, scaffolded skill practice, digital courseware, and teacher support that can be mapped to state standards and district adoption requirements, supporting a coherent progression of content knowledge and disciplinary skills for students beginning in 9th grade and continuing through AP coursework.
Proposers do not have to provide a complete curriculum. Samples are sufficient.	We have sent print student editions of our complete collection of AP titles including: *The Language of Composition (4E)* - AP Language *Ideas in Argument (1E)* - AP Language *Literature & Composition (3E)* - AP Literature *Ideas in Literature (1E)* - AP Literature *The Practice of Statistics for the AP® Course (7E)* - AP Statistics *Calculus for the AP® Course (4E)* - AP Calculus AB/BC *Environmental Science for the AP® Course (4E)* - AP Environ Science *College Physics for the AP® Physics 1&2 Courses (3E)* - AP Physics 1&2 *Biology for the AP® Course (1E)* - AP Biology *Krugman's Economics for the AP® Course (4E)* - AP Economics *Krugman's Macroeconomics for the AP® Course (4E)* - AP Macroeconomics *Myers' Psychology for the AP® Course (4E)* - AP Psychology *America's History for the AP® Course (11E)* - AP US History *Fabric of a Nation (2E)* - AP US History *American Government: Stories of a Nation for the AP Course (2E)* - AP U.S. Government *Ways of the World with Sources for the AP® Modern History Course (5E)* *Human Geography for the AP® Course (2E)* - AP Human Geography *Comparative Government: Stories of the World (1E)* - AP Comp Government *A History of Western Society for the AP® European History Course (14E)* - AP Euro History *Freedom on My Mind: A History of African Americans (3E)* - AP African American Studies

Upon receipt of a purchase order, we guarantee shipping of materials within five business days with delivery within ten business days for in-stock print items. Shipping is calculated at 5% of the total purchase order.

Our catalog can be found at https://www.bfwpub.com/high-school/ca and features further information on our programs and support options.

BFW Implementation Plan (Sample)

This implementation plan is based on an anticipated vendor selection in Spring 2026 for a Fall 2026 implementation. Dates are approximate and will be adjusted based on selection/ purchase date. BFW will also work to customize any implementation period or tasks required. All implementation costs are included in the adoption fee so there would be no additional associated costs (excepting some PD courses; please refer to the PD brochure for further details).

✔	Activity / Task / Milestone	District Team	BFW Team	Start Date	Additional Information	Scope
Initial Rollout		**Deadline: Spring/Summer 2026**				
	Vendor selection/curriculum selection/contract/purchase order issuance.	District	BFW Contract Team/Account Manager	Spring 2026		1 occurrence
	BFW will set up an initial onboarding meeting to ascertain project needs including training and integration; and finalize timeline and corresponding plan.	District	Account Manager	Spring 2026	Remote meeting anticipated (1 hour)	1 occurrence
	BFW will work on Achieve integration if required.	District	BFW Customer Experience Team	Spring 2026	Approximate total hours required (8 hours)	1 month
	Delivery of materials	N/A	BFW Warehouse	May 2026	For teachers and students.	
	Begin BFW Courseware Training and BFW Course Tours (gratis, self-scheduled by teachers/staff); and Synchronous BFW Implementation Training (remote) through August.	District Teachers/Staff	BFW Customer Experience Team	May 2026 - August 2026	Our implementation training and onboarding provides teachers with an overview of how to use and implement digital technology in the classroom as well as an overview of teacher and student resources. It does not include any in-depth discipline content coverage. Please refer to the provided PD brochure for further information. Hours required - TBD based on number of teachers	3 months

Post Rollout		**Deadline: Ongoing**				
	Assessment Meeting to determine areas of success and improvement prior to Spring term start.	District	Account Manager	November 2026	Remote meeting anticipated (1 hour)	1 occurrence
	BFW will schedule any further professional development or follow-up training for next Spring.	District Teachers/Staff	BFW Customer Experience Team	January 2027	Hours required - TBD based on number of teachers	1 month

	BFW will monitor progress throughout Year 1 implementation.	District	Account Manager & BFW Customer Experience Team	Ongoing		1 year
	BFW will schedule annual meetings with stakeholders to review progress to date, share product updates, and plan implementation for the subsequent years.	District	Account Manager	Ongoing	Spring and Fall Terms - Remote meeting anticipated (1 hour)	Ongoing

BFW Team Members:

Craig Bleyer, Executive Sales Representative (314.402.5103, cbleyer@bfwpub.com)
Cassidy Krogulski, Western Regional Manager (ckrogulski@bfwpub.com)
Customer Services Representative - TBD

Anne Posegate, Director-Bids & Contracts (adoptions@bfwpub.com)

Tab V - Experience and References

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Experience and References

Experience/Qualifications

Bedford, Freeman & Worth Publishing Group LLC (BFW) has been selling high school AP® and on-level materials to public, private, and homeschooling sectors in all U.S. states and territories for over 44 years and has a multitude of repeat contracts with local and state school districts including Tennessee and Knox County. BFW is a private, limited-liability corporation owned 100% by Macmillan Holdings, a U.S. company in the portfolio of Verlagsgruppe Georg Von Holtzbrinck GmbH (Holtzbrinck) of which Dr. Stefan Von Holtzbrinck is the Chairman of the Board and majority owner. Macmillan Holdings is located at 120 Broadway, 25th Floor, New York, New York, 10271. Holtzbrinck has significant holdings in the science, education, technology and publishing markets across North America and Europe. Beyond Macmillan Holdings, Verlagsgruppe Georg Von Holtzbrinck GmbH also owns Macmillan's trade publishing division.

We currently employ 550+ employees globally. Our officers include: Susan Winslow-CEO, Charles Linsmeier-EVP & General Manager, Shani Fisher-VP, Discipline Strategy, HSS & High School, and Simon Horrer, EVP-Finance & Operations. Further information on company leadership can be found at https://www.macmillanlearning.com/college/us/our-story/our-leadership. News can be found at https://community.macmillanlearning.com/t5/macmillan-learning-newsroom/ct-p/newsroom.

Our TIN is 13-4047598 and our Duns is 009135245. As a privately-held company, financial records will not be released but the company is in good financial standing. Total sales for our High School division are estimated at $49 million in 2018, $52 million in 2019, $59 million in 2020, $62 million in 2021, $66 million in 2022, $72 million in 2023, and $90 million in 2024. Our bank is HSBC Bank USA (452 Fifth Ave., New York, NY 10018, amy.martinez.hsbcsvc@us.hsbc.com).

All services are provided in-house other than the service providers outlined in our Privacy Notice at https://www.bfwpub.com/high-school/ca/legal/privacy-notice.

Support

For your teachers, we provide onsite as well as web-based professional training and support with gratis, ongoing support on our textbook and digital resources and professional development in regards to content/teaching skills. Our online High School Teaching Community provides free access to premium content including course tours, professional development, webinars on demand, valuable teaching resources, and curriculum and state-focused sub-communities. Our High School Support Portal provides 24/7 help to teachers, parents and students via a Knowledge Base (searchable by role, products, topic and features) as well as real-time email, chat and phone support options (8AM to 3AM (ET) M-Th; 8AM to 12AM (ET) Fri; 12AM to 8PM (ET) Sat; and 12PM to 3AM (ET) Sun) and is included at no additional cost for the length of your commitment. Our PD Brochure outlines our gratis and fee-based PD options and is included with this proposal.

Personnel

We do not provide organizatonal charts due to confidentiality issues. Communication and support would be primarily through your assigned sales rep, Craig Bleyer (Executive Sales Representative, cbleyer@bfwpub.com, 314-402-5103). Craig has over thirty years of sales experience in the K-12 marketplace; twenty five years of experience with BFW and its various divisions as a director, manager and senior sales representative. Craig has supported our high school customers and products for the last five years. He is our senior sales representative covering TN, is currently working with your district, and would be your primary contact (Emory University, B.S. Economics and Political Science, 1990)

Cassidy Krogulski (Western Regional Manager (ckrogulski@bfwpub.com supports Craig in all regional sales matters. With a background in teaching high school social studies, her eleven years at BFW have been filled with opportunities to help teachers and administrators alike to find high-quality instructional materials to help students across the country. Cassidy was recently

promoted to Sr. Regional Manager for our western territory (including TN) and can assist your district as needed. (PennWest Edinboro, B.S. Secondary Education Social Studies, 2013; Professional Teaching Certification, PA 2014-2024).

As a Macmillan Learning business, BFW is supported by the services and budget of the Macmillan Learning infrastructure including security and compliance matters, staff requirements, support and software maintenance.

References

We partner with a wide range of districts across the country—from large, diverse urban districts such as New York City, Las Vegas, Los Angeles, Houston, Broward County (FL), Atlanta, Charlotte-Mecklenburg (NC), and Dallas, to many smaller rural and suburban districts as well including Knox. As requested, we have included references.

We have created a custom product portal for you at https://collections.bfwpub.com/collections/68d56a0994820167bf27614e?utm_source=Paperflite%20Link.

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ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: Bedford, Freeman & Worth Publishing Group LLC

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: Williamson County SD TN

Contact Person: Jennifer Sower Phone Number: (615) 472-4078

Email Address: jennifer.sower@wcs.edu Fax Number: N/A

Nature of Contract: Adopted AP Materials

Services Provided: Provided book and courseware for AP courses.

Dollar amount: $1m plus across 10 AP course areas (over life of contract)

Contract start date: 2020 Contract end date: 2033

Name of Firm: Clarksville Montgomery County SS TN

Contact Person: Sheila Mensing Phone Number: (931) 553-1111

Email Address: sheila.mensing@cmcss.net Fax Number: N/A

Nature of Contract: Adopted AP Materials

Services Provided: Provided book and courseware for AP courses.

Dollar amount: $ 500K plus across 7 AP course areas (over life of contract)

Contract start date: 2020 Contract end date: 2033

Name of Firm: Rockwood School District MO

Contact Person: Jordan McGuaghey Phone Number: N/A

Email Address: mcguagheyjordan@rsdmo.org Fax Number: N/A

Nature of Contract: Adopted AP Materials

Services Provided: Provided book and courseware for AP courses.

Dollar amount: $ 500K plus 5 course areas (over life of contract)

Contract start date: 2022 Contract end date: 2031

Craig S. Bleyer

16837 Kehrsdale Drive, Clarkson Valley, MO 63005
csbleyer@gmail.com, (314) 402-5103

Executive Summary

Leader in the educational technology and publishing industry with experience serving in a diverse range of management roles across product development, organizational design, competitive strategy, and sales & operations.

Professional Experience

Macmillan Learning — New York, New York

Senior Sales Representative for High School Sales (Missouri, Nebraska, Iowa, Kansas) June 2021-Present

Senior Vice President & General Manager of Institutional Businesses January 2018-April 2021

Managed iClicker, Intellus Learning & Skyfactor, three independent educational software companies. Directed operations, product development, marketing, sales, and research & development.

- Constructed a robust digital subscription model for iClicker increasing sales by >150% in 24 months.
- Oversaw 13 successful, competitive request-for-proposal processes for multi-year institutional clients.
- Implemented a cost-structure enhancement plan that resulted in $4 million in annual savings and >10% margin enhancement.

Senior Vice President of College & High Schools Sales January 2012-January 2018

Transformed a traditional print publishing salesforce of 250 employees into a leading $300 million educational technology sales operation throughout a period of sustained technical and competitive disruption.

- Outperformed industry-average sales growth by >25% over 6 years, consistently expanding market share.
- Reduced annual cost of sales by $5 million through reorganizing the sales coverage structure, bundling print and digital product lines, improving sales opportunity tracking, streamlining communication channels, and introducing an enterprise customer-relationship management tool.
- Advised CEO and company's financial sponsor on sales strategy, product development, and cost controls.
- Coordinated vendor management with Amazon, Vital Source, Barnes & Noble and Follett and supported implementation of a direct-to-consumer distribution channel.

Director of High School Sales, Marketing & Editorial Operations December 2009-January 2012

Constructed a cohesive operational unit combining sales, marketing, and editorial teams to develop higher-quality content and media for AP instructors and students resulting in sales growth of $20 to $50 million.

- Converted the inside sales team into a field-based operation that targeted higher-margin, denser metropolitan markets with large AP student populations.
- Outpaced peers to achieve the top selling product in a majority of the best-selling AP product categories.
- Developed an integrated media platform to complement print items and enhance overall product-quality.

- Sourced strategic partnerships with third party software providers, such as Clever and Vital Source, to integrate existing media products within school learning management systems, contributing $15 million in incremental business.

***Senior Publisher for STEM & Economics*,** July 1999-December 2009
Executive Director for Economics, Mathematics & Statistics, and
Acquisitions Editor for Mathematics

Managed a 20-person editorial and media team overseeing a $70 million product list while integrating acquired digital & media companies, such as Sapling Learning and establishing partnerships with courseware providers.

- Consistently exceeded revenue and profit targets while overseeing profit and loss management.
- Developed and launched Nobel Prize Winner Paul Krugman's economics product series through a partnership with courseware provider *Aplia* to become the leading economics courseware product.
- Launched Macmillan's first courseware product *Stats Portal* and supported *Launchpad* platform development.
- Signed and published leading economics authors: Paul Krugman, Steven Levitt, Austin Goolsbee, Alan Krueger, and Rob Feenstra, which expanded sales by a 24.5% annualized growth rate over a ten-year period.

Pearson Education **New York, New York**

Senior Marketing Manager: Economics & Developmental Mathematics September 1990-July 1999
District Manager, and Sales Representative

- Developed marketing strategy to support the top developmental mathematics curriculum in North America.
- Coordinated marketing efforts surrounding the launch of *MyMathLab*, the top mathematics courseware product that integrates with existing print and media products.
- Directly marketed Pearson economics products to professors helping achieve top-rated sales rankings.

Professional & Sales Networks

- North American university administrators, professors, and curriculum supervisors
- Middle market and emergent educational and enterprise technology space
- American educational and trade publishing industry

Education & Skills

Emory University, **Atlanta, Georgia**
Bachelor of Science in Economics & Political Science August 1986-May 1990

Leadership Certifications

- Pragmatic Marketing Certification (2017)
- Holtzbrinck Group Executive International Leadership Program (2014)

Skills & Strengths: Competitive Strategy, Product Development, Marketing Management, Cost Control, Sales Management, Operations Management, Strategic Implementation, Organization Governance

Technical Abilities: Microsoft Word, Outlook, PowerPoint, Excel, Salesforce.com, Google Enterprise Suite

Hobbies & Interests

British & American History, Winston Churchill, Golf, St. Louis Cardinals Baseball

Tab VI - Proposed Costs

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Please refer to the PD brochure for further details. We would have to negotiate the cost based on your PD requirements/timing.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses. Please refer to the attached pricing list.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost. Please refer to the PD brochure.
- Digital resources that the teachers and/or students would need to fully implement the program. Please refer to the attached pricing list.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost). Shipping would be 5% for all print materials.
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost). N/A
- Software Services N/A

Total cost for the scenario: $_____ Please refer to the attached sample quote.

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

This price quote is good for 60 days. BFW High School Publishers is committed to delivering the best value for the program you have adopted. Pricing herein may reflect package discounts. Removing or editing components may cancel any package discounting applied to component items. Prices subject to change, including annual increases in November. Shipping fees are estimated; actual shipping fees may vary.

Purchase Orders: Please attach a copy of this price quote to your purchase order and submit your purchase order to:

MPS 16365 James Madison Highway Gordonsville, VA 22942
Email: highschool@mpsvirginia.com / Phone: (540) 672-7744

See PD costs on attached sheet for content expert. In person supplement and courseware training free along with follow up scheduler for teachers to set appointments during length of contract.

Quote Number	00131984	Prepared By	Craig Bleyer
Created Date	10/1/2025	Phone	+1 3144025103
		Email	cbleyer@bfwpub.com

Bill To	Knox County Schools Accounts Payable PO 2188 Knoxville, Tennessee 37901 United States	Ship To	Knox County Schools 1000 N Central St Knoxville, Tennessee 37917 United States

Itemized Products

ISBN	EAN	Product	Edition	Author	Sales Price	Quantity	Total Price
1319550096	9781319550097	Achieve for The Language of Composition (Six-Use Online; Add-On)	4	Renee Shea;Lawrence Scanlon;Robin Aufses;Megan M. Harowitz;Katherine Cordes;Carlos Escobar	USD 39.00	250.00	USD 9,750.00
1319409253	9781319409258	Language of Composition	4	Renee Shea;Lawrence Scanlon;Robin Aufses;Megan M. Harowitz;Katherine Cordes;Carlos Escobar	USD 114.98	250.00	USD 28,745.00

Itemized Product Total: USD 38,495.00

Free Product: Please include in your PO:

ISBN	EAN	Free Product	Edition	Author	Line Item Description	Net Price	Quantity	Your Price
1319469213	9781319469214	Teacher's Edition with Online Teacher Resources for The Language of Composition	4	Renee Shea;Lawrence Scanlon;Robin Aufses;Megan M. Harowitz;Katherine Cordes;Carlos Escobar	"Teacher's Edition with Online Teacher Resources for The Language of Composition"	USD 495.98	7	$0.00
1319574858	9781319574857	Test Bank for The Language of Composition	4	Renee Shea;Lawrence Scanlon;Robin Aufses;Megan M. Harowitz;Katherine Cordes;Carlos Escobar	"Test Bank for The Language of Composition"	USD 495.98	7	$0.00

Total Available for Purchase USD 0.00

Shipping Information

Schools are typically tax exempt however if your school is **NOT** tax exempt, please note that your local tax rate will apply to this quote.

Shipping Location Continental US and Puerto Rico

Shipping Fees:	USD 1,924.75
Special Shipping Fees:	USD 0.00
Total Shipping Fees:	USD 1,924.75

Grand Totals

Itemized Products + Shipping Fees:	USD 40,419.75

Instructor Resources

Digital Adopters: Instructor resources will be available within your product; no action needed

Print Only Adopters: Instructor resources can be unlocked by visiting www.bfwpub.com/AdopterTRM

Digital Subscription Terms

Digital subscription terms: With respect to each product, the number of licenses allocated to you will be determined by multiplying the quantity purchased by the number of uses (where use = year). [Example: 100 units of a 6-use product = 600 licenses.]

Access to each title will expire on the first to occur of (1) all purchased units which would be available over the course of the number of uses have been utilized, or (2) the number of uses has transpired utilizing the following calculation: utilizing August 1 as the start of a new year, (i) If the invoice date falls between January 1 and September 30, the end date of the subscription term shall be calculated as the invoice year plus the number of uses indicated [Example: 100 units of a 6-use product is invoiced on April 15, 2023. The end date based on uses purchased = July 31, 2029]; and (ii) If the invoice date falls between October 1 and December 31, the end date of the subscription term shall be calculated as invoice year plus the number of uses indicated + 1]. [Example: 100 units of a 6-use product is invoiced on November 15, 2023. The end date based on uses purchased = July 31, 2030.]

For complete subscription terms, see bfwpub.com/subscription-terms. Your issuance of a purchase order based on this quote or your payment for the courseware subscription signifies your affirmative understanding and acceptance of these terms.

License uses are not restricted during your subscription term, so as not to inhibit or impede the learning process, but all uses will count toward your purchase quantity based on the above calculation. If you exceed the quantity purchased, you will receive an invoice for the number of licenses used beyond those purchased.

The New Edition Option: If chosen at the time of initial purchase, the New Edition option permits the one-time option to upgrade to a new courseware edition at any time within your active courseware subscription term. It is your responsibility to inform your BFW representative when you are ready to proceed with the upgrade. The New Edition Option does not apply to e-books and applies exclusively to digital courseware and not print products.

Miscellaneous Information

Sole Source Statement: Competition in providing the above named products is precluded by the existence of a copyright. There are no like products available for purchase that serve the same purpose because of exclusive distribution/marketing rights. These products should be purchased directly from BFW (MPS) or its approved depositories. Purchases from any other source would not ensure the item's authenticity/warranty. Unapproved 3rd party vendors cannot provide packages, digital materials or teaching materials. BFW (MPS) cannot provide these items to a school if the student edition has been purchased through a third party. We are the sole source for these items and packages.

Note for Canadian Users: Please note that invoices are issued in CAD, but if payment is to be made via credit card, it will be processed through our US Bank and an exchange rate fee will be applied.

NOTE: If you plan to place an order and will require a signed data agreement, please send to your rep as soon as possible. Agreement reviews take an average of 1-3 weeks to review.

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Pricing - AP ELA*

Ideas in Argument (1E) - AP Language

Book/Supplements	©	ISBN: 13	Price	Notes
Ideas in Argument	**2022**	**9781319356637**	**$114.98**	**Print Student Edition (SE)**
Achieve for Ideas in Argument (1-Year; Pack Add-On)	2022	9781319550189	$12.00	Purchased with print SE
Achieve for Ideas in Argument (6-Year; Pack Add-On)	2022	9781319550172	$39.00	Purchased with print SE
Achieve for Ideas in Argument (1-Year)	2022	9781319524173	$55.00	Standalone without print SE
Achieve for Ideas in Argument (6-Year)	2022	9781319550165	$126.98	Standalone without print SE
Teacher's Edition for Ideas in Argument	2022	9781319418816	$495.98	1 free copy for every 30 copies of print SE
Test Bank for Ideas in Argument	2022	9781319574772	$495.98	1 free copy for every 30 copies of print SE
AP® English Language Skills Practice Workbook for Ideas in Argument	2022	9781319471897	$16.98	Student workbook.

The Language of Composition (4E) - AP Language

Book/Supplements	©	ISBN: 13	Price	Notes
The Language of Composition (4E)	**2023**	**9781319409258**	**$114.98**	**Print Student Edition (SE)**
Achieve for The Language of Composition (1-Year; Pack Add-On)	2023	9781319550103	$12.00	Purchased with print SE
Achieve for The Language of Composition (6-Year; Pack Add-On)	2023	9781319550097	$39.00	Purchased with print SE
Achieve for The Language of Composition (1-Year)	2023	9781319524319	$55.00	Standalone without print SE
Achieve for The Language of Composition (6-Year)	2023	9781319550080	$126.98	Standalone without print SE
Teacher's Edition for The Language of Composition	2023	9781319469214	$495.98	1 free copy for every 30 copies of print SE
Test Bank for The Language of Composition	2023	9781319574857	$495.98	1 free copy for every 30 copies of print SE

Ideas in Literature (1E) - AP Literature

Book/Supplements	©	ISBN: 13	Price	Notes
Ideas in Literature (1E)	**2023**	**9781319461744**	**$118.98**	**Print Student Edition (SE)**
Achieve for Ideas in Literature (1-Year; Pack Add-On)	2023	9781319550257	$12.00	Purchased with print SE
Achieve for Ideas in Literature (1-Year; Pack Add-On)	2023	9781319550240	$39.00	Purchased with print SE
Achieve for Ideas in Literature (1-Year)	2023	9781319524418	$55.00	Standalone without print SE
Achieve for Ideas in Literature (6-Year)	2023	9781319550233	$130.98	Standalone without print SE
Teacher's Edition for Ideas in Literature	2023	9781319475451	$495.98	1 free copy for every 30 copies of print SE
Test Bank for Ideas in Literature	2023	9781319574789	$495.98	1 free copy for every 30 copies of print SE
Student Workbook for Ideas in Literature	2023	9781319517878	$15.98	Student workbook.

Literature & Composition (3E) - AP Literature

Book/Supplements	©	ISBN: 13	Price	Notes
Literature & Composition (3E)	**2022**	**9781319281144**	**$118.98**	**Print Student Edition (SE)**
Achieve for Literature & Composition (1-Year; Pack Add-On)	2022	9781319550226	$12.00	Purchased with print SE
Achieve for Literature & Composition (6-Year; Pack Add-On)	2022	9781319550219	$39.00	Purchased with print SE
Achieve for Literature & Composition (1-Year)	2022	9781319553418	$55.00	Standalone without print SE
Achieve for Literature & Composition (6-Year)	2022	9781319550202	$130.98	Standalone without print SE
Teacher's Edition for Literature & Composition	2022	9781319404376	$495.98	1 free copy for every 30 copies of print SE
Test Bank for Literature & Composition	2022	9781319574840	$495.98	1 free copy for every 30 copies of print SE

*Shipping is 5% of the cost of all print materials excluding teacher's materials.

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Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Pricing - AP Social Studies*

A History of Western Society for the AP® European History Course (14E) **- AP European History**

A History of Western Society for the AP® European History Course 14E	**2024**	**9781319484439**	**$152.98**	**Print Student Edition**
A History of Western Society for the AP® European History Course (1-Year; Pack Add-On)	2024	9781319561062	$12.00	Purchased with print SE
A History of Western Society for the AP® European History Course (6-Year; Pack Add-On)	2024	9781319561079	$39.00	Purchased with print SE
A History of Western Society for the AP® European History Course (1-Year)	2024	9781319535049	$55.00	Standalone without print SE
A History of Western Society for the AP® European History Course (6-Year)	2024	9781319535063	$164.98	Standalone without print SE
Teacher's Edition for A History of Western Society for the AP® European History Course	2024	9781319534943	$495.98	1 free copy for every 30 copies of print SE purchased
Test Bank for A History of Western Society for the AP® European History Course	2024	9781319535209	$495.98	1 free copy for every 30 copies of print SE purchased
Strive for a 5: Preparing for the AP® European History Exam	2024	9781319535223	$39.98	$15 if purchased with print SE

Human Geography for the AP® Course (2E) **- AP Human Geography**

Human Geography for the AP® Course 2E	**2025**	**9781319535810**	**$148.98**	**Print Student Edition**
Achieve for Human Geography for the AP® Course (1Year; Pack Add-On)	2025	9781319611354	$12.00	Purchased with print SE
Achieve for Human Geography for the AP® Course (6-Year; Pack Add-On)	2025	9781319607623	$39.00	Purchased with print SE
Achieve for Human Geography for the AP® Course (1-Year)	2025	9781319536015	$55.00	Standalone without print SE
Achieve for Human Geography for the AP® Course (6-Year)	2025	9781319536039	$160.98	Standalone without print SE
Teacher's Edition for Human Geography for the AP® Course	2025	9781319535865	$495.98	1 free copy for every 30 copies of print SE purchased
Test Bank for Human Geography for the AP® Course	2025	9781319536046	$495.98	1 free copy for every 30 copies of print SE purchased
Strive for a 5: Preparing for the AP Human Geography Exam	2025	9781319614133	$39.98	$15 if purchased with print SE

Ways of the World for the AP® World History Modern Course Since (5E) **- AP World History**

Ways of the World with Sources for the AP® Modern History Course 5E	**2023**	**9781319409302**	**$139.98**	**Print Student Edition**
Achieve for Ways of the World (1-Year; Pack Add-On)	2023	9781319549213	$12.00	Purchased with print SE
Achieve for Ways of the World (6-Year; Pack Add-On)	2023	9781319549206	$39.00	Purchased with print SE
Achieve for Ways of the World (1-Year)	2023	9781319524388	$55.00	Standalone without print SE
Achieve for Ways of the World (6-Year)	2023	9781319549176	$151.98	Standalone without print SE
Teacher's Edition for Ways of the World	2023	9781319493806	$495.98	1 free copy for every 30 copies of print SE purchased
Test Bank for Ways of the World	2023	9781319574994	$495.98	1 free copy for every 30 copies of print SE purchased
Thinking Through Sources for Ways of the World	2023	9781319513474	$23.98	Print student workbook

Fabric of a Nation (2E) **- AP American History**

Fabric of a Nation (2E)	**2024**	**9781319484422**	**$144.98**	**Print Student Edition**
Achieve for Fabric of a Nation (1-Year; Pack Add-On)	2024	9781319560959	$12.00	Purchased with print SE
Achieve for Fabric of a Nation (6-Year; Pack Add-On)	2024	9781319560966	$39.00	Purchased with print SE
Achieve for Fabric of a Nation (1-Year)	2024	9781319534202	$55.00	Standalone without print SE
Achieve for Fabric of a Nation (6-Year)	2024	9781319534165	$156.98	Standalone without print SE
Teacher's Edition for Fabric of a Nation	2024	9781319533724	$495.98	1 free copy for every 30 copies of print SE purchased
Test Bank for Fabric of a Nation	2024	9781319534172	$495.98	1 free copy for every 30 copies of print SE purchased
Strive for a 5: Preparing for the AP® U.S. History Exam	2025	9781319535766	$39.98	$15 if purchased with print SE

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America's History for the AP® Course (11E) - AP American History

America's History for the AP® Course 11E	**2025**	**9781319535650**	**$166.98**	**Print Student Edition**
Achieve for America's History for the AP® Course (1-Year; Pack Add-On)	2025	9781319611316	$12.00	Purchased with print SE
Achieve for America's History for the AP® Course (6-Year; Pack Add-On)	2025	9781319607630	$39.00	Purchased with print SE
Achieve for America's History for the AP® Course (1-Year)	2025	9781319535735	$55.00	Standalone without print SE
Achieve for America's History for the AP® Course (6-Year)	2025	9781319535742	$178.98	Standalone without print SE
Teacher's Edition for America's History for the AP® Course	2025	9781319535698	$495.98	1 free copy for every 30 copies of print SE purchased
Test Bank for America's History for the AP® Course	2025	9781319535773	$495.98	1 free copy for every 30 copies of print SE purchased
Strive for a 5: Preparing for the AP® U.S. History Exam	2025	9781319535766	$39.98	$15 if purchased with print SE

American Government: Stories of a Nation for the AP® Course (2E) - AP US Government & Politics

American Government: Stories of a Nation for the AP Course 2E	**2025**	**9781319535988**	**$142.98**	**Print Student Edition**
Achieve for American Government: Stories of a Nation (1-Year; Pack Add-On)	2025	9781319589233	$12.00	Purchased with print SE
Achieve for American Government Stories of a Nation (6-Year; Pack Add-On)	2025	9781319589226	$39.00	Purchased with print SE
Achieve for American Government: Stories of a Nation (1-Year)	2025	9781319536145	$55.00	Standalone without print SE
Achieve for American Government: Stories of a Nation (6-Year)	2025	9781319536152	$154.98	Standalone without print SE
Teacher's Edition for American Government: Stories of a Nation	2025	9781319536084	$495.98	1 free copy for every 30 copies of print SE purchased
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Krugman's Economics for the AP® Course (4E)	**2023**	**9781319409326**	**$188.98**	**Print Student Edition**
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Achieve for Myers' Psychology for the AP® Course (6-Year)	2024	9781319551612	$178.98	Standalone without print SE
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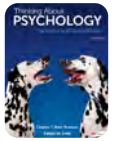

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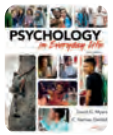

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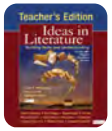

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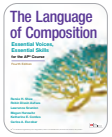

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AP® Language

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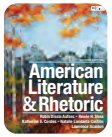

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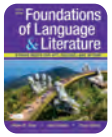

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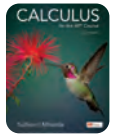
A complete program for 9th grade on-level, honors, and Pre-AP® that establishes foundational skills, while challenging bright young minds. This genre and mode based book approaches the course in new ways, investigating nonfiction as well as literature, delving into fascinating argument-driven thematic units, and asking students to write in the genres, to empower them to read like a writer.

Math and Science



AP® Calculus

CALCULUS FOR THE AP® COURSE, FOURTH EDITION
Michael Sullivan, Kathleen Miranda

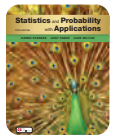
The student-friendly *Calculus for the AP® Course*, 4e program gives students all of the tools and support they need to ace the AP® Course and Exam—from fundamentals to essential problem-solving skills. Trust this program to offer unmatched and abundant AP® practice and alignment, relevant and conceptual focuses, online homework, resources and more at **bfwpub.com/APCalc4e**.



AP® Statistics • Market Leader • By High School Teachers

THE PRACTICE OF STATISTICS FOR THE AP® COURSE, SEVENTH EDITION
Daren S. Starnes, Josh Tabor

From the beloved author team, *The Practice of Statistics for the AP® Course*, 7e is the most comprehensive and CED-aligned program ever produced for AP® Statistics. It offers unparalleled AP® support and practice, accessible features, and unmatched pedagogy and resources. Complete with online homework and more with Achieve. Explore more at **bfwpub.com/TPS7e**.



On-Level/Intro Statistics • By High School Teachers

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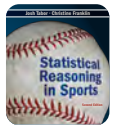
Daren S. Starnes, Josh Tabor, Luke Wilcox

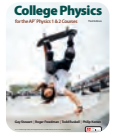
The gold standard in high school statistics. "SPA" offers engaging lessons with video support, detailed examples, differentiation features, real-world data, and more - written by the most trusted and beloved author team. This edition aligns with national and state math standards and offers updated data, features, and enhanced teacher resources—more at **bfwpub.com/SPA5e**.



Sports/Elective Statistics • By High School Teachers

STATISTICAL REASONING IN SPORTS, SECOND EDITION
Josh Tabor, Chris Franklin

A unique and powerful way to introduce the principles of statistical reasoning, "SRIS" features engaging examples and a student-friendly approach. More at **bfwpub.com/SRIS2e**.



AP® Physics 1 and 2 • Aligned to 2025 CED

COLLEGE PHYSICS FOR THE AP® PHYSICS 1 & 2 COURSES, THIRD EDITION
Gay Stewart, Roger A. Freedman, Todd Ruskell, Philip R. Kesten

The only program that integrates AP® skill-building and exam prep into a comprehensive college-level textbook (now in a single volume) that provides students and teachers with the resources they need to succeed in *AP® Physics 1 and AP® Physics 2*. Find CED alignment, updated features and resources, and a digital solution with online homework and more at **bfwpub.com/Stewart3e**.



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The only program built from the ground up specifically to suit the needs of the AP® Environmental Science course, with integrated AP® content, exam prep, science practices, and more—including unmatched teacher and student resources. Fully aligned to the CED, integrated skills practice, and updated material. Explore more at **bfwpub.com/APES4e**.



On-Level Chemistry

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Angelica M. Stacy

Living by Chemistry is an on-level chemistry program whose inquiry-based, activity-a-day approach, grounded in NGSS standards, allows students to develop scientific-thinking skills and apply them to chemistry in the real world. Complete with a full set of teacher resources and digital support including an accessible and interactive e-book and online homework. Explore more at **bfwpub.com/lbc3e**.



AP® Biology

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James Morris, Domenic Castignetti, John Lepri, Rick Relyea

The first and only textbook program aligned with AP® Biology course goals and structure. The Science practices and the four Big Ideas of AP® Biology are integrated throughout, along with strong practice problems, student friendly narrative, and a stunning visual program. Fully aligned with the CED, this program comes with a robust teacher resource package. **bfwpub.com/pounce**.

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Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Sample List

Bedford, Freeman & Worth Publishing Group LLC is committed to providing the best service and support to Knox County in regards to your RFP #3688 - Advanced Academics Program. We can provide a comprehensive AP® program which includes courses/curricular frameworks, assessments, services and supports and enable your high school students to demonstrate college/career readiness and earn post-secondary credit in a variety of disciplines, all fully correlated to College Board Standards with 100% CED framework alignment down to the topic level.

We are including our complete collection of student editions as samples for your review:

ELA:
The Language of Composition Student Edition (4E) - AP Language - 9781319409258
Ideas in Argument Student Edition - AP Language - 9781319356637
Literature & Composition Student Edition (3E) - AP Literature - 9781319281144
Ideas in Literature - AP Literature - 9781319461744

Math:
The Practice of Statistics for the AP® Course Student Edition (7E) - AP Statistics - 9781319409340
Calculus for the AP® Course Student Edition (4E) - 9781319453428

Science:
Environmental Science for the AP® Course Student Edition (4E) - AP Environ Science - 9781319409289
College Physics for the AP® Physics 1&2 Courses Student Edition (3E) - AP Physics - 9781319486211
Biology for the AP® Course Student Edition (1E) - AP Biology - 9781319113315

Social Studies:
Krugman's Economics for the AP® Course Student Edition (4E) - AP Economics - 9781319409326
Krugman's Macroeconomics for the AP® Course Student Edition (4E) - AP Macroeconomics - 9781319409333
Myers' Psychology for the AP® Course Student Edition (4E) - AP Psychology - 9781319281168
America's History for the AP® Course Student Edition (11E) - AP US History - 9781319535650
Fabric of a Nation Student Edition (2E) - AP US History - 9781319484422
American Government: Stories of a Nation for the AP Course Student Edition (2E) - AP U.S. Government - 9781319535988
Ways of the World with Sources for the AP® Modern History Course Student Edition (5E) - 9781319409302
Human Geography for the AP® Course Student Edition (2E) - AP Human Geography - 9781319535810
Comparative Government: Stories of the World for the AP® Course Student Edition (1E) - AP Comp Government - 9781319443238
A History of Western Society for the AP® European History Course Student Edition (14E) - AP Euro History - 9781319484439
Freedom on My Mind: A History of African Americans, With Documents, Updated for the AP® Course Student Edition (3E) - AP African American Studies - 9781319579821

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Tab VIII - Exceptions

Offeror: Bedford, Freeman and Worth Publishing Group LLC

Knox County - Advanced Academics Program - RFP #3688

Exceptions

Attachment C - Section 21 - Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words “Endeavor To” and “But Failure To” (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.

Cannot agree to this. We do not provide due to the timing of our policy renewal. Any new policies will be reflected on the certificate of insurance which is renewed annually in late January. All changes would be reflected in the issuance of a new COI at the time of the annual policy renewal.

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Tab IX - Attachments

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Please refer to the PD brochure for further details. We would have to negotiate the cost based on your PD requirements/timing.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses. Please refer to the attached pricing list.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost. Please refer to the PD brochure.
- Digital resources that the teachers and/or students would need to fully implement the program. Please refer to the attached pricing list.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost). Shipping would be 5% for all print materials.
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost). N/A
- Software Services N/A

Total cost for the scenario: $_____ Please refer to the attached sample quote.

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident) $1,000,000 BODY INJURY (Per–Person) BODY INJURY (Per-Accident) PROPERTY DAMAGE (Per-Accident
YES	4.	COMMERCIAL GENERAL LIABILITY	LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE $ 1,000,000
			FIRE LEGAL LIABILITY $ 100,000
			MED EXP (Per person) $ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY $ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE $ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE $ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2,000,000 ANNUAL AGGREGATE
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000
NO		PROFESSIONAL LIABILITY	
NO	10.	ARCHITECTS &ENGINEERS	$1,000,000 PER OCCURRENCE/CLAIM
NO		ASBESTOS & REMOVAL LIABILITY	$2,000,000 PER OCCURRENCE/CLAIM
NO		MEDICAL MALPRACTICE	$1,000,000 PER OCCURRENCE/CLAIM
NO		MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)
NO	13.	MOTOR CARGO INSURANCE	
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$
NO	17.	DISHONESTY BOND	$
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.
NO	19.	USL&H	FEDERAL STATUTORY LIMITS

20. **Carrier rating shall be Best's Rating of A-VII or better or its equivalent.**

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. **The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.**

23. **Certificate of Insurance shall show the RFP number and title.**

Insurance Agent's Statement and certification: **I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.**

Agency Name: Marsh USA **Authorizing Signature:** Anckner, Ann Digitally signed by Anckner, Ann DN: cn=Anckner, Ann, ou=NYC Date: 2025.09.24 09:11:43 -04'00'

Proposer's Statement and Certification: **If awarded the Contract, I will comply with the Contract insurance requirements.**

Bedford, Freeman & Worth Publishing Group LLC

Proposer's Name: _____ **Authorizing Signature:** Anne Pasegate

ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, Shravan Sheela, president or other principal

Officer of Bedford, Freeman & Worth Publishing Group LLC, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

President or Principal Officer

For: Bedford, Freeman & Worth Publishing Group LLC
Name of Company

STATE OF TEXAS
COUNTY OF TRAVIS

Subscribed and sworn before me by Shravan Sheela,

President or principal officer of Bedford, Freeman & Worth Publishing Group LLC,

On this 1st day of October 2025.

V. Jane Shipwash
Notary Public

My Commission expires: 06/28/2026

VIRGINIA JANE SHIPWASH
Notary Public, State of Texas
Comm. Expires 06-28-2026
Notary ID 133833057

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature: Anne Pasegate

(sign in blue ink)

Title: Director, Bids & Contracts Date: 9/23/2025

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature: Anne Pasegate

(sign in blue ink)

Title: Director, Bids & Contracts Date: 9/23/2025

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying," in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.



Outlook

[External]Re: [External]Re: [External]Re: [External]Re: Exception Taken to Advanced Academic Programs RFP No. 3688

From Craig Bleyer <cbleyer@bfwpub.com>
Date Mon 10/20/2025 10:14 AM
To Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>; Melissa Vigilante <melissa.vigilante@macmillan.com>
Cc Katherine Dolhon <katherine.dolhon@macmillan.com>

Thank you

Sent from Gmail Mobile

On Mon, Oct 20, 2025 at 9:02 AM Rachel Cabrera <Rachel.Cabrera@knoxcounty.org> wrote:

> Hi Craig,
>
> I appreciate you getting back to me. The email acknowledgment is sufficient.
>
> Thank you,
>
> Rachel Cabrera
>
> Knox County Procurement Division
>
> 1000 N. Central St.
>
> Suite, 100
>
> Knoxville, TN 37917
>
> Ph: 865-215-5751
>
> Fax: 865-215-5778
>
> rachel.cabrera@knoxcounty.org
>
> KNOX COUNTY TENNESSEE
>
> ---
>
> **From:** Craig Bleyer <cbleyer@bfwpub.com>
> **Sent:** Friday, October 17, 2025 4:07 PM

To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>; Katherine Dolhon <katherine.dolhon@macmillan.com>
Subject: [External]Re: [External]Re: [External]Re: Exception Taken to Advanced Academic Programs RFP No. 3688

Rachel we discussed with our legal and finance team and we can accept the 30 day notice language. Looping in Katherine if you need anything done with paperwork or this acknowledgment good.
Thank you

Craig

Want to chat in person--book a time with me: Calendar
View 2025 BFW Catalog
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ACHIEVE TECH QUESTIONS/NEEDS?

1. Have you checked with your school/district tech team first?
2. Help site: https://mhe.my.site.com/bfwhighschool/s/
3. CHATBOT MILLIE on the support page-lower right corner.

Craig Bleyer| Executive Sales Representative| C 314.402.5103 |

BFW Publishers

We Get You AP® Ready!

Who We Are | Our Community | Support

On Fri, Oct 17, 2025 at 2:28 PM Rachel Cabrera <Rachel.Cabrera@knoxcounty.org> wrote:

> Hi Craig,
>
> That is a requirement to do business with the County. However, the provision in the insurance checklist requires the broker or agent issuing the certificate to notify the County at least 30 days prior to cancellation
>
> Thank you,
>
> Rachel Cabrera
>
> Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

KNOX COUNTY
TENNESSEE

From: Craig Bleyer <cbleyer@bfwpub.com>
Sent: Friday, October 17, 2025 2:56 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>; Katherine Dolhon <katherine.dolhon@macmillan.com>; Melissa Vigilante <melissa.vigilante@macmillan.com>
Subject: [External]Re: [External]Re: Exception Taken to Advanced Academic Programs RFP No. 3688

Rachel, I am copying my contract specialist (Katherine) who is working with me while Melissa (the contract specialist who submitted the RFP) as she discussed with our legal dept. Can we replace the language with this below.

"BFW agrees to have and maintain continuous coverage during the course of the contract."

If this works let us know if not then Katherine needs to go back to legal.

Thank you

Craig

Want to chat in person--book a time with me: Calendar
View 2025 BFW Catalog
View BFW Canada
View BFW Accessibility

ACHIEVE TECH QUESTIONS/NEEDS?

1. Have you checked with your school/district tech team first?
2. Help site: https://mhe.my.site.com/bfwhighschool/s/
3. CHATBOT MILLIE on the support page-lower right corner.

Craig Bleyer| Executive Sales Representative| C 314.402.5103 |



We Get You AP® Ready!

Who We Are | Our Community | Support

On Thu, Oct 16, 2025 at 3:15 PM Rachel Cabrera <Rachel.Cabrera@knoxcounty.org> wrote:

> Hi Craig,
>
> I appreciate your response. Please try to let me know by Monday, October 20th , 2025.
>
> Thank you,
>
> Rachel Cabrera
>
> Knox County Procurement Division
>
> 1000 N. Central St.
>
> Suite, 100
>
> Knoxville, TN 37917
>
> Ph: 865-215-5751
>
> Fax: 865-215-5778
>
> rachel.cabrera@knoxcounty.org
>
> 
>
>
> ---
>
> **From:** Craig Bleyer <cbleyer@bfwpub.com>
> **Sent:** Thursday, October 16, 2025 4:02 PM
> **To:** Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>; Adoptions BFW

<Adoptions@bfwpub.com>; Melissa Vigilante <melissa.vigilante@macmillan.com>; Nicole Sheppard <nsheppard@bfwpub.com>
Cc: ckrogulski@bfwpub.com <ckrogulski@bfwpub.com>
Subject: [External]Re: Exception Taken to Advanced Academic Programs RFP No. 3688

Rachel, I am passing this on to our contract team as the lead on the RFP is out this week. When do you need to know this.
Thank you

Craig

Want to chat in person--book a time with me: Calendar
View 2025 BFW Catalog
View BFW Canada
View BFW Accessibility

ACHIEVE TECH QUESTIONS/NEEDS?

1. Have you checked with your school/district tech team first?
2. Help site: https://mhe.my.site.com/bfwhighschool/s/
3. CHATBOT MILLIE on the support page-lower right corner.

Craig Bleyer| Executive Sales Representative| C 314.402.5103 |



We Get You AP® Ready!

Who We Are | Our Community | Support

On Thu, Oct 16, 2025 at 3:00 PM Rachel Cabrera <Rachel.Cabrera@knoxcounty.org> wrote:

> Good afternoon,
>
> After completing a cursory review of your proposal, the exception taken to the insurance checklist must be removed to move forward in the evaluation. The County requires that the certificate issuer provide notice of at least 30 days prior to cancellation of coverage for the insured. Please email me stating whether your company agrees to remove the exception by Monday, October 20th 2025 to move forward in the evaluation. If your company is unable to remove the exception, your proposal will be deemed non-responsive.

Thank you,

Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org



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>>>CAUTION<<<

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Knox County Government

and

College Board

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and College Board, hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this Contract.** This Contract commences on the 1st day of April 2026 and ends the 30th day of September 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. Upon the mutual agreement of the vendor and the County, the award may be extended for five (5) additional one-year periods. This may result in a total of five (5) years, five (5) months and four (4) weeks.. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor..

2. **Subcontracting/partnerships:** Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. **Payment.** Contractor warrants that the pricing shall remain firm for the initial period. At the end of the first period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. **Inspection and acceptance:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. **Termination.** Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) calendar days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. **Appropriations.** In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. **Contractor Default:** Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. **Independent contractor.** Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. **Compliance with all federal, state, and municipal laws.** Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. **Criminal history records check:** Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. **Severability clause.** If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. **Prohibition against assignment.** Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. **This Contract** shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. **Right to inspect.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. **Nondiscrimination and non-conflict statements.** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. **Books and records.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will be provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any

kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____
BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**
MAYOR – Signature **MAYOR**

Date:_____

KNOX COUNTY LAW DIRECTOR'S OFFICE
CONTRACT NO. 26-105 (b)
APPROVED AS TO LEGAL FORM

_____ Gary Dupler
LAW DIRECTOR – Signature **LAW DIRECTOR – Printed Name**

Date: 2/20/2026

CONTRACTOR

_____ _____
AUTHORIZED SIGNATURE **CONTRACTOR – Printed Name**

COLLEGE BOARD
COMPANY NAME

Date:_____

The Procurement Division of Knox County, Tennessee will receive sealed proposals for the provision of **Advanced Academics Program** as specified herein. Proposals must be received by **2:00 p.m.** on **October 14, 2025**. Late proposals will neither be considered nor returned.

Deliver Proposals To:

Proposal Number 3688
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, Tennessee 37917

The Proposal Envelope must show the Proposal Number, Proposal Name & Proposal Closing Date.

SECTION I PROPOSAL PREPARATION AND SUBMISSION

1.1 **ADDITIONAL INFORMATION:** Knox County wants requests for additional information routed to Jay Garrison, Procurement Coordinator, CPPO, CPPB at 865.215.5767. Questions may be faxed to 865.215.5778 or emailed to jay.garrison@knoxcounty.org. If you have not heard from the Buyer in a reasonable amount of time, please call for further assistance. Information about the Knox County Procurement Division and current solicitations may be obtained on the Internet at www.knoxcounty.org/procurement.

1.2 **ACCEPTANCE:** Vendors shall hold their price firm and subject to acceptance by Knox County for a period of one hundred twenty (120) business days from the date of the proposal closing, unless otherwise indicated in their proposal.

1.3 **ALTERNATIVE PROPOSALS:** Knox County will not accept alternate proposals (those not equal to specifications) unless authorized by the Request for Proposal.

1.4 **AUDIT HOTLINE:** Knox County has established an Audit Hotline to report potential fraud and waste. To report potential fraud, waste or abuse, please file a report online by accessing http://www.knoxcounty.org/audit/hotline.php.

Vendors are hereby cautioned that this Audit Hotline does not replace the Award Protest Procedures found in Section VI, Item M of the Knox County Procurement Regulations.

1.5 **AWARD:** Award will be made to the most responsive, responsible proposer(s) meeting specifications and presenting the product(s) and/or service(s) that is in the best interest of Knox County. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple award. Knox County reserves the right to not award this proposal. Award will be made in accordance with the evaluation criteria specified herein.

1.6 **BUSINESS OUTREACH PROGRAM:** Knox County has established a Business Outreach Program which has the responsibility of increasing opportunity for small, minority and women owned businesses. This is being accomplished through community education programs, policy edification, active recruitment of interested businesses and process re-engineering.

Knox County is committed to ensuring full and equitable participation for all disadvantaged businesses. Knox County welcomes submittals from those disadvantaged businesses that have an interest in providing goods and/or services listed herein. In addition, Knox County strongly encourages the inclusion of disadvantaged businesses by non-disadvantaged Contractors who wish to partner or subcontract portions of this agreement in order to accomplish the successful delivery of goods and/or services. If you are a disadvantaged business and would like additional information about our Business Outreach Program, please contact:

Diane Woods, Business Outreach Administrator
Telephone: 865.215.5760
Fax: 865.215.5778
Email: diane.woods@knoxcounty.org

1.7 **CONFLICT OF INTEREST:** Vendors must have read and comply with the "Non-Conflict of Interest" statement provided in the vendor registration process prior to the closing of this solicitation. Knox County's Non-Conflict of Interest Policy is available for review at https://www.knoxcounty.org/purchasing/conflict_policy.php.

1.8 **COPIES:** Knox County requires that proposals be submitted as one (1) marked as original and one (1) exact copy. **Proposers must submit with their written response an exact electronic version of their proposal in a single PDF file on a flash drive format.**

1.9 **DECLARATIVE STATEMENTS:** Any statement or words (e.g.: must, shall, will) are declarative statements and the vendor must comply with the condition. Failure to comply with any such condition may result in the proposal being considered non-responsive and disqualified.

1.10 **ELECTRONIC TRANSMISSION OF PROPOSALS:** Knox County's Procurement Division will not accept electronically transmitted proposals. Facsimile and email submissions are strictly prohibited. Due to the nature of the information requested, all submissions shall be in written format.

1.11 **HOW TO DO BUSINESS:** Knox County utilizes a web-based Procurement software system, "KnoxBuys." The system provides our clients (vendors, county departments and the citizens of Knox County) with a more enhanced and end-user friendly means of accessing our services. The system allows for on-line vendor registration and maintenance, electronic receipt of purchase orders, on-line retrieval and submittal of quotes, bids and proposals for our vendor-clients and on-line requisitioning and receiving for our county departments. In order for the County to maximize its investment and minimize the cost associated with office operations, we need your help. When doing business with Knox County, we are urging you to please go to our website at www.knoxcounty.org/procurement, register as a vendor in our on-line Procurement system, "KnoxBuys," if you have not done so and whenever possible to conduct your business with the County through this site. If you have any questions, please contact the Procurement Division Representative listed in Section 1.1 of this document.

1.12 **INCURRED COSTS:** Knox County will not be responsible for any costs incurred by the proposer in the preparation of their proposal.

1.13 **MULTIPLE PROPOSALS:** Knox County will consider multiple proposals that meet specifications.

1.14 **NON-COLLUSION:** Proposers, by submitting a signed proposal, certify that the accompanying proposal is not the result of, or affected by, any unlawful act of collusion with any other person or company engaged in the same line of business or commerce, or any other fraudulent act punishable under Tennessee or United States law.

1.15 **PAYMENT METHOD:** Knox County will utilize a Purchase Order for placing an order for products and/or services. Purchase Orders will be issued from the Knox County Procurement Division via the method selected by the vendor during registration. The Purchase Order will detail the quantity, specific item(s) and the contracted price for each item. Work on this project must not commence until a signed Purchase Order is issued by Knox County Procurement.

1.16 **POSSESSION OF WEAPONS:** All vendors, their employees and their agents are prohibited from possessing any weapons on Knox County property without prior written consent from the County. In the case of a vendor whose Contract requires possession of firearms or other weapons to successfully complete their Contract, vendor must provide personnel who are bonded to bear said weaponry.

1.17 **PROCESSING TIME FOR PAYMENT:** Vendors are advised that a minimum of thirty (30) days is required to process invoices for payment.

1.18 **PROOF OF FINANCIAL AND BUSINESS CAPABILITY:** Vendors must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these specifications. Knox County will make the final determination as to the vendor's ability.

1.19 **PROPOSAL DELIVERY:** Knox County requires proposers, when hand delivering proposals, to time and date stamp the envelope before depositing it in the bid box. Knox County will not be responsible for any lost or misdirected mail sent by common carrier, nor will Knox County be responsible for proposals delivered to addresses or Suites other than the delivery address and Suite specified at the top of this solicitation. The time clock in the Procurement Division shall serve as the official record of time.

Solicitations must be in a sealed envelope/box prior to entering the Procurement Division office. Procurement Division personnel are not allowed to see the submittal nor assist in placing documents in an envelope/box. Additionally, the Procurement Division is not responsible for providing materials (e.g. envelopes, boxes, tape) for submittals.

1.20 **RECYCLING:** Knox County, in its continuing efforts to lessen the amount of landfill waste and to further recycling efforts, requests that proposals being submitted on paper shall:

1.20.1 Be submitted on recycled paper;
1.20.2 Not include pages of unnecessary advertising;
1.20.3 Be made on both sides of each sheet of paper.

1.21 **RESTRICTIVE OR AMBIGUOUS SPECIFICATIONS:** It is the responsibility of the prospective proposer to review the entire Request for Proposal packet and to notify the Procurement Division if the specifications are formulated in a manner that would unnecessarily restrict competition. Any such protest or question regarding the specifications or proposing procedures must be received in the Procurement Division by **September 26, 2025 at 4:30 p.m. local time**. These requirements also apply to specifications that are ambiguous.

1.22 **SIGNING OF PROPOSALS:** In order to be considered, all proposals must be signed. Please sign the original in blue ink. By submitting a signed letter authorizing the submission of the proposal, the vendor acknowledges and accepts the terms and conditions stated in the proposal document.

1.23 **TAXES:** Knox County purchases are not subject to taxation. Tax exemption certificates will be provided upon request.

1.24 **TITLE VI OF THE 1964 CIVIL RIGHTS ACT AND TITLE IX OF THE EDUCATIONAL AMENDMENT OF 1972:** "Nondiscrimination in Federally Assisted Programs"—"No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." 42 U.S.C. Section 2000. It is the policy of Knox County Government that all its services and activities be administered in conformance with the requirements of Title VI and Title IX.

1.25 **UNFORESEEN CIRCUMSTANCES:** During periods of closure due to unforeseen circumstances in Knox County or closures at the direction of the Knox County Mayor, the Procurement Division will enact the following procedures in regard to solicitations and closures:

- If the Mayor closes the Administrative offices prior to the time set for solicitation opening of any business day, all solicitations due that same day will be moved to the next operational business day.
- Other unforeseen circumstances shall be at the sole discretion of the Procurement Director.
- Knox County shall not be liable for any commercial carrier's decision regarding deliveries during any unforeseen circumstances.

1.26 **USE OF PROPOSAL FORMS:** Vendors must complete the proposal forms contained in the proposal package. Failure to complete the proposal forms may result in proposal rejection.

1.27 **VENDOR DEFAULT:** Knox County reserves the right, in case of vendor default, to procure the articles or services from other sources and hold the defaulting vendor responsible for any excess costs occasioned thereby. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidder's list for twenty-four (24) months.

1.28 **VENDOR REGISTRATION:** Prior to the submission deadline for this solicitation, ***ALL PROPOSERS MUST*** be registered with the Procurement Division. If you are not already a registered vendor with Knox County, register on-line at our website at www.knoxcounty.org/procurement and click on "Knox Buys" and then select "Online Vendor Registration." Vendors must be registered with the Procurement Division **prior** to submitting their proposal. Knox County shall not be responsible for technical difficulties experienced by vendors trying to register electronically less than twenty-four (24) hours prior to the proposal closing time.

1.29 **WAIVING OF INFORMALITIES:** Knox County reserves the right to waive minor informalities or technicalities when it is in the best interest of Knox County.

SECTION II OBLIGATIONS, RIGHTS AND REMEDIES

These terms and conditions shall be part of the Contract. Knox County reserves the right to negotiate other terms and conditions it deems appropriate and necessary under the circumstances to protect the public's trust.

2.1 **ALTERATIONS OR AMENDMENTS:** No alterations, amendments, changes, modifications or additions to this Contract shall be binding on Knox County without the prior written approval of the County.

2.2 **APPROPRIATION:** In the event no funds are appropriated by Knox County for the goods or services in any fiscal year, or insufficient funds exist to purchase the goods or services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

2.3 **ASSIGNMENT:** Contractor shall not assign or sub-contract this agreement, its obligations or rights hereunder to any party, company, partnership, incorporation or person without the prior written specific consent of Knox County.

2.4 **BOOKS AND RECORDS:** Vendor shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices at all reasonable times during the Contract period and for five (5) years from the date of the final payment under this agreement for inspection by County or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Vendor's costs of manufacturing, acquiring or delivering the products and services governed by this agreement.

2.5 **CHILD LABOR:** Contractor agrees that no products or services will be provided or performed under this Contract that have been manufactured or assembled by child labor.

2.6 **COMPLIANCE WITH ALL LAWS:** Contractor is assumed to be familiar with and agrees to observe and comply with all Federal, State, and Local laws, statutes, ordinances, and regulations in any manner affecting the provision of goods and/or services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

2.7 **CRIMINAL HISTORY RECORDS CHECK:** Any and all successful proposers, Contractor's employees, Contractor's subcontractors and the employees of any subcontractors must submit to a criminal history records check at the Contractor's expense, conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413. Proposers **must** submit with their proposals the Criminal History Affidavit of Compliance.

2.8 **DEFAULT:** If Contractor fails to perform or comply with any provision of this Contract or the terms or conditions of any documents referenced and made a part hereof, Knox County may terminate this Contract, in whole or in part, and may consider such failure or noncompliance a breach of Contract. Knox County expressly retains all its rights and remedies provided by law in case of such breach, and no action by Knox County shall constitute a waiver of any such rights or remedies. In the event of termination for default, Knox County reserves the right to purchase its requirements elsewhere, with or without competitive solicitation.

2.9 **GOVERNING LAW; VENUE:** This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

2.10 **INCORPORATION:** All specifications, drawings, technical information, Request for Proposal, Proposal, Award and similar items referred to or attached or which are the basis for this Contract are deemed incorporated by reference as if set out fully herein.

2.11 **INDEMNIFICATION—HOLD HARMLESS:** Contractor shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of Contractor, its subcontractors, suppliers, agents or employees.

2.12 **INDEPENDENT CONTRACTOR:** Contractor shall acknowledge that it and its employees serve as independent contractors and that Knox County shall not be responsible for any payment, insurance or incurred liability.

2.13 **INSPECTION AND ACCEPTANCE:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

2.14 **IRAN DIVESTMENT ACT:** By submission of this Request for Proposal response, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

2.15 **LIMITATIONS OF LIABILITY:** In no event shall Knox County be liable for any indirect, incidental, consequential, special or exemplary damages or lost profits, even if Knox County has been advised of the possibility of such damages.

2.16 **NO BOYCOTT OF ISRAEL:** Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the Contract engage in, a boycott of Israel. Proposers must submit with their proposals the completed Iran Divestment Act/No Boycott of Israel Affidavit.

2.17 **NON-DISCRIMINATION AND NON-CONFLICT STATEMENT:** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex **or** national origin any individual trait or characteristic found to be an illegal consideration, shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this agreement or in the employment practices of vendor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination. Contractor covenants that it complies with the Fair Wage and Hour Laws, the National Labor Relations Act, and other Federal and State employment laws as applicable. Contractor covenants that it does not engage in any illegal employment practices.

Contractor covenants that it has no public or private interest and shall not acquire directly or indirectly any interest that would conflict in any manner with the provision of its goods or performance of its services. Contractor warrants that no part of the total Contract amount provided herein shall be paid directly or indirectly to any officer or employee of Knox County as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor or consultant to Contractor in connection with any goods provided or work contemplated or performed relative to the agreement.

2.18 **ORDER OF PRECEDENCE:** In the event of inconsistent or conflicting provision of this Contract and referenced documents, the following descending order of precedence shall prevail: (1) Contract, (2) Request for Proposal, (3) Contractor's Response, (4) Award, (5) Special Terms and Conditions, (6) General Terms and Conditions, (7) Specifications, (8) Drawings.

2.19 **REMEDIES:** Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in Contract and in tort, including but not limited to, rejection of goods, rescission, and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

2.20 **RIGHT TO INSPECT:** Knox County reserves the right to make periodic inspections of the manner and means the service is performed or the goods are supplied and warehoused.

2.21 **SEVERABILITY:** If any provision of this Contract is declared illegal, void or unenforceable, the remaining provisions shall not be affected but shall remain in force and in effect.

2.22 **TAX COMPLIANCE:** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal or proposal and signature, it is current in its respective Federal, State, County, and City taxes of whatever kind or nature, and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Procurement Division.

2.23 **TERMINATION:** County may terminate this agreement with or without cause at anytime. In the event of termination by either party, fees due for services satisfactorily performed or goods accepted prior to the termination date shall be paid. Contractor shall not perform additional work without the expressed permission of County. In the event Contractor intends to interrupt or discontinue service under this Contract, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

2.24 **WARRANTY:** Contractor warrants to Knox County that all items delivered and all services rendered shall conform to the specifications, drawings, solicitation and/or other descriptions furnished and/or incorporated by reference, and will be fit for the particular purpose purchased of merchantable quality, good workmanship, and free from defects. Contractor extends to Knox County all warranties allowed under the U.C.C. Contractor shall provide copies of warranties to the County upon request. Return of merchandise not meeting warranties shall be at contractor's expense.

SECTION III SPECIAL TERMS AND CONDITIONS

3.1 **INTENT:** The intent of this document is to set forth and convey to prospective proposers the general requirements for vendors to provide Knox County Schools with Advanced Academic Programs as desired by Knox County and Knox County Schools (KCS). Award will be based on Best Value. Best value means more than low cost. It includes cost, technical service quality, experience, qualifications and other factors detailed herein.

3.2 **ACCEPTANCE:** Vendors are advised that the payment of an invoice does not necessarily constitute as an acceptance of services that are provided. Acceptance requires a specific written action by Knox County so stating.

3.3 **ADDITIONS OR DELETIONS:** Knox County reserves the right to add or delete services as the need arises. If services are to be added, Knox County and the Contractor will arrive at a mutually agreed price. Any additions or deletions must be approved in writing by Knox County Procurement prior to any changes in service.

3.4 **AWARD LENGTH:** The pricing for this Contract must remain firm for thirty-six (36) months. However, due to the funding source Knox County does not allow automatic renewals, this Contract will need to be extended annually to continue services. Knox County will draft the Extension of Contract and send it to the vendor approximately ninety (90) days before expiration. The agreement may be renewed for two (2) one-year periods upon mutual consent, for a possible total of five (5) years. Following the initial thirty-six (36) months, the Contractor may request a change in price.

3.5 **CHANGES AFTER AWARD:** It is possible that after award, Knox County might change its needs or requirements. Knox County reserves the right to make such changes after consultation with the vendor. Should additional costs arise, Knox County reserves the right to consider accepting these charges provided the vendor can document the increased costs. Knox County also reserves the right to accept proposed service changes from the vendor if they will lower the cost to Knox County and/or provide improved service.

3.6 **COMMUNICATION:** The successful execution of this contract will require extensive communication between all involved parties. While information may be transmitted via telephone, it should always be followed up with an email. It is essential that the Contractor have an efficient email capabilities. The Contractor will be required to submit a list of individuals, along with direct phone numbers, cell phone numbers and email addresses for the agency's contacts. These individuals must be familiar with the Knox County Contract and have authority to make adjustments as requested by Knox County.

3.7 **COMPLIANCE WITH ALL APPLICABLE REGULATIONS:** Vendor agrees and covenants that the company, its agents and employees will comply with all City, County, State and Federal codes, laws, rules and regulations applicable to the business to be conducted under this contract. If the vendor performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, the vendor shall bear all costs arising from such work.

3.8 **CONTACT PERSONNEL:** Essential to the success of this Contract is the development of a good working relationship between the vendor and Knox County. It is imperative that the Knox County account be handled efficiently and professionally. Knox County should be assigned no more than two (2) vendor contacts to handle billing inquiries and service related issues. In the event on or both contacts leave the Knox County account, the vendor shall formally introduce the new contacts to Knox County personnel. These contacts must be knowledgeable of the County's account to avoid an interruption of service.

3.9 **CONTRACT EXECUTION:** The award of this proposal may result in a Contract between Knox County and the successful vendor(s). The Contract may require Knox County Board of Education and/or Knox County Commission approval. The successful vendor(s) may be required to be present at the Board of Education and/or County Commission meeting(s) to answer questions relating to the service to be performed. Adequate notification will be given by Knox County Procurement Division if the awarded vendor(s) will need to attend meetings. There shall be no cost to Knox County for attendance of the vendor(s). Knox County will draft the Contract. The Knox County Procurement Division will not accept any vendor's contract. A sample contract is under Exhibit B for review. If Master Agreements, Service Agreements, Terms and Conditions or other contract agreements are submitted they will not be accepted.

3.10 **CONTRACTOR DUTIES:** At the Contractor's own expense, the Contractor shall:

3.10.1 Provide competent supervision;
3.10.2 Provide competent personnel;
3.10.3 Take precautions necessary to protect persons or property against injury or damage and be responsible for any such damage or injury that occurs as a result of their fault or negligence.

3.11 **DESTINATION AND DELIVERY:** All shipments that are to be delivered must be Free on Board Destination to the department ordering the items. All shipping charges are to be included in the unit price of each item. All deliveries must be unloaded and delivered inside to the department location that is ordering the items.

3.12 **EVALUATION CRITERIA:** This proposal will be evaluated using the following criteria:

As per Section 1.5, Knox County will determine the award structure that is in its best interest.

Methodology	30 Points
Delivery of Service	30 Points
Experience & References	20 Points
Cost	20 Points

Knox County may select an Evaluation Committee for this solicitation to thoroughly review and score all submitted responsive and responsible proposals. Each evaluator will have the ability to award up to one hundred (100) points, based on the Evaluation Criteria, per submission.

3.13 **EVALUATION REVIEW:** Knox County reserves the right to use all pertinent information (including information learned from sources other than disclosed in the Request for Proposal process) that might affect the County's judgment as to the appropriateness of an award to the best evaluated vendor(s). This information may be appended to the proposal evaluation process results. Information on a service provider from reliable sources, and not within the service provider's proposal, may also be noted and made part of the evaluation file. Knox County shall have sole responsibility for determining a reliable source. Knox County reserves the right to conduct written and/or oral discussions/interviews after the proposal closing. The purpose of such discussions/interviews is to provide clarification and/or additional information to make an award that is in the best interest of Knox County.

3.14 **EXCEPTIONS TO SPECIFICATIONS:** Vendors taking exception to any part or section of these specifications shall indicate such exceptions on their submittal. A failure to indicate any exception(s) shall be interpreted as the vendor's intent to fully comply with the specifications as written. Conditional or qualified offer are subject to rejection in whole or in part. Any exceptions shall be included in Section V, Tab VIII of the submittal. **Do not strike through or in any other way alter the Request for Proposal. Exceptions listed within other sections of the submittal shall not be reviewed or considered.**

3.15 **GRANT FUNDING:** The products or services being procured under this solicitation are being funded by Federal Grant money. All awarded vendors will be required to adhere to Exhibit A of this solicitation in the performance of the Contract.

3.16 **GRATUITIES AND KICKBACKS:** It shall be a breach of ethical standards for any person or company to offer, give, or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim, or controversy or other particular matter, pertaining to any program requirement of a contract or subcontract or to any solicitation or proposal therefore. It shall be a breach of ethical standards for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or a person associated therewith, as an inducement for the award of a subcontract or order. Breach of the provisions of this paragraph is, in addition to a breach of this Contract, a breach of ethical standards which may result in civil or criminal sanction and/or debarment or suspension from being a contractor or subcontractor under Knox County contracts.

3.17 **IDENTIFICATION:** Employees of the Contractor shall have proper photo identification displayed at all times while on property belonging to Knox County.

3.18 **INSURANCE:** The successful vendor(s) must carry the insurance as indicated on the Insurance Checklist Attachment hereto. As proof of the vendor's willingness to obtain and maintain the insurance, the vendor must complete, sign and have its insurance agent sign the attachment and submit it with the proposal. Upon the Notification of Intent to Award, the successful vendor will be required to submit a Certificate of Insurance (COI) including any corresponding endorsement page(s) with the specified coverage and listing Knox County as an additional insured. It shall be the successful vendor's responsibility to keep a current COI and endorsement page(s) on file with Knox County Procurement for as long as the contract is in effect.

3.19 **INTERPRETATION:** No oral interpretation will be made to any vendor regarding the meaning of specifications or the Scope of Work. All questions are to be submitted in writing via email and will be answered in the form of an addendum to the solicitation by the Knox County Procurement Division, if applicable.

3.20 **INVOICE DETAIL:** Knox County is requesting invoices to show the following detail to help expedite review and payment. The Contractor(s) may be required to modify invoicing procedures to show the detail. All potential Contractors are hereby cautioned that Knox County will only pay from original invoices and not facsimiles or copies. Invoices which do not adhere to these details may be returned to the Contractor for correction.

3.20.1 The invoice must show the amount due to the Contractor by Knox County;
3.20.2 The invoice must show a summary of completed work;
3.20.3 Invoices are to be original and uniquely pre-numbered;
3.20.4 Invoices which do not show this information are subject to rejection.

3.21 **INVOICING PROCEDURES:** Knox County requests that invoices be easy to read and understand. Invoices are to be original and uniquely pre-numbered. There shall be no additional charge for this information and these procedures to be included. Each invoice shall include a summary of service(s) provided and shall list the associated unit price. Supporting documentation shall be included with invoices as applicable. Invoices without this information will be returned to the Contractor for correction.

Invoices shall be sent to the billing address indicated on the Purchase Order. Each department or division of Knox County is responsible for its own budget. Departments cannot charge or pay bills for another department. Therefore, it is critical that the successful Contractor's invoices specify the correct department. Do not credit payments to another department's account. Invoices must be submitted in triplicate and must match the corresponding Purchase Order number. There shall be no component billing. Mail invoices for Knox County Schools to:

Knox County Schools Finance Department
Post Office Box 2188
Knoxville, TN 37902-1805
invoices@knoxschools.org

3.22 **INVOICE REVIEW:** Knox County shall review all invoices for adherence to the terms and conditions of the Contract. Variations from the Contract and Contract pricing are strictly prohibited. Any variance found on the invoice will result in rejection of that invoice. Rejected invoices will be returned to the Contractor(s) for correction. Repeated variations may result in termination.

3.23 MINIMUM QUALIFICATION EXPECTATIONS:

3.23.1 Respondent must address all submittal requirements as defined under Section IV.

3.23.2 Respondent shall have a minimum of five (5) years of experience and sufficient capabilities to carry out the work contemplated, as well as the equipment and personnel available for the work.

3.23.3 If the respondent has a permanent office in Knox County, respondent must have a current business license issued by Knox County.

This requirement also applies to any of the Respondent's proposed subcontractors or subconsultants with a permanent office in Knox County. A Knox County business license is not required of any Respondent or proposed subcontractor or subconsultant who does not have a permanent office in Knox County. For more information, contact the Knox County Clerk's office at 865.215.2392.

3.24 NEGOTIATION: Knox County may select a successful proposer on the basis of initial offers received without discussions. Therefore, each proposal shall contain the proposer's best terms from a cost or price and service standpoint. Knox County reserves the right to enter into Contract negotiations with the highest-rated proposer. If Knox County and the selected proposer cannot negotiate a successful agreement, Knox County may terminate said negotiations and begin negotiations with the next highest-rated proposer. Knox County retains the right to negotiate with multiple proposers simultaneously. This process will continue until an agreement has been reached or all proposers have been rejected. No proposer shall have any rights against Knox County arising from such negotiations.

3.25 NEWS RELEASES BY VENDORS: As a matter of policy, Knox County does not endorse the services of a Contractor. A Contractor will not make news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County.

3.26 NO CONTACT POLICY: After the date and time that the vendor receives this solicitation, any contact initiated by any proposer with any Knox County representative, other than the Procurement Division representative listed herein, concerning this Request for Proposal, is strictly prohibited. Any such unauthorized contact may cause the disqualification of the proposer from this procurement transaction.

3.27 OFFER WITHDRAWAL: No proposal can be withdrawn after it is filed unless the proposer makes a request in writing to the Knox County Procurement Division prior to the time set for the closing of proposals or unless the County fails to accept within one hundred twenty (120) business days after the date fixed for the closing the Request for Proposal.

3.28 ORAL PRESENTATION/INTERVIEW: Knox County may require proposers to give oral presentations/interviews in support of their proposal or to exhibit or otherwise demonstrate the information contained therein. These presentations/interviews may be conducted virtually through video conferencing or in person.

Knox County reserves the right to request oral presentations and/or interviews during the initial evaluation phase. The County also reserves the right to complete the initial evaluation phase and then request oral presentations and/or interviews from all proposers or the highest rated proposers. In this case, the evaluations may be revised based on additional information received during presentations.

3.29 PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of thirty-six (36) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

3.30 **PROPOSAL CONTENT:** The proposer's response must contain a thorough description of the background of the proposer and sufficient evidence showing that the proposer is capable of providing the services. The proposer's response must thoroughly expound on the proposer's understanding of how the proposed services will meet Knox County's needs. The proposal must also contain an explanation of the implementation plan and the proposer's ongoing commitment to service.

3.31 **PROPOSAL EVALUATION:** In evaluation of submitted proposals, Knox County reserves the right to use any or all of the ideas from the proposals submitted without limitation and to accept any part or the entire successful proposal in selecting an operation which is judged to be in the best interest of Knox County. All material submitted becomes property of Knox County.

3.32 **PROPOSAL FORMAT:** This solicitation is in the Request for Proposal format. As the specified date and time, each proposer's name will be publicly read aloud. No further information will be given at that time. Evaluation of the proposals will proceed as expeditiously as possible and successful, as well as unsuccessful, notification will be given.

3.33 **PROPOSER OBLIGATION:** Proposers shall become fully acquainted with conditions relating to the scope of the work detailed in this Request for Proposal. Failure to become acquainted with the existing conditions shall in no way absolve the proposer of any obligations with respect to this Request for Proposal or the Contract.

3.34 **PUBLIC RECORDS ACT:** Knox County is subject to the Tennessee Open Records Act 10-7-503 et seq. Proposers are cautioned that all documents submitted on behalf of this Request for Proposal shall be open to the public for viewing and inspection.

3.35 **QUANTITIES:** Knox County does not guarantee any quantity of services will be utilized under this solicitation. Services will be utilized on an as needed basis.

3.36 **REJECTION OF PROPOSALS:** Knox County reserves the right to reject any and all proposals received as a result of this request and to waive any informality, technical defect or clerical error in any proposal, as the interests of Knox County may require. Non-acceptance of any proposal will be devoid of any criticism of the proposal and of any implication that the proposal is deficient in any manner. Non-acceptance of any proposal shall be construed as meaning simply that the County does not deem the proposal acceptable or that another proposal was deemed more advantageous to Knox County for the particular services proposed.

3.37 **REMOVAL OF CONTRACTOR'S EMPLOYEES:** Contractor agrees to utilize only experienced, responsible and capable people in the performance of the work. Knox County may require that the Contractor remove from the job covered by this Contract, including employees who endanger persons or property or whose continued employment under this Contract is inconsistent with the interest of Knox County.

3.38 **SUBMIT QUESTIONS:** Prospective proposers may submit questions concerning this solicitation until **September 26, 2025 at 4:30 p.m. local time**.

3.39 **SUSPENSION AND DEBARMENT:** Vendor will notify Knox County Government if they become suspended, debarred, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities during the term of this proposal and during the term of any subsequent Contract for service.

3.40 **TENNESSEE REGISTRATION:** The successful proposer must meet any applicable State of Tennessee registration requirements.

SECTION IV SCOPE OF WORK

4.1 **BACKGROUND:** Knox County Schools (KCS) is a public education agency. It is responsible for the education of children from preschool through high school. There are approximately fifty-nine thousand (59,000) Pre-K through 12th-grade students and approximately seven thousand eight hundred (7,800) employees. For purposes related to this RFP, the district is comprised of ninety-two (92) schools that represent urban, suburban, and rural populations.

4.2 **FACILITIES & EQUIPMENT:** All facilities for training in Knoxville, TN will be provided by Knox County Schools. Upon request, Knox County will provide a computer and projection system, with accommodations for trainers to use their own computers.

4.2 **PARTICIPANTS:** The number of participants may vary. Vendors may work with an entire school/department staff, smaller school content teams and/or district teams, individuals, or any combination thereof. A defined number of training sessions or participants is not guaranteed. Participants will be staff members serving our students.

4.3 **PROGRAM CONTENT & METHODOLOGY:** Knox County Schools is seeking vendors to partner with our schools and district to provide high quality, rigorous academic programming for 9th through 12th grades which prepares our students to be successful in their next phase of life. The program must promote academic excellence and equity in the Early Postsecondary Opportunities, (EPSO), as listed on the Tennessee Department of Education website and listed in the Ready Graduate and/or College and Career Readiness accountability indicator.

More information on EPSO can be found at the following link: https://www.tn.gov/education/students/early-postsecondary.html

The Advanced Academics organization should provide a comprehensive program to include courses/curricular frameworks, assessments, services and supports that provide opportunities for students to demonstrate college and career readiness and have the potential to earn postsecondary credit. The curricular program should be of high-quality which includes discipline specific critical thinking, inquiry, reasoning and communication skills. The programming of the courses should support and encourage learner potential by challenging students to inquire skillfully, think critically, and reflect meaningfully. Students should have the opportunity to engage in learning across all content areas with an informed curiosity that will equip students to be successful in their future endeavors. These areas must be inclusive of, but not limited to: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education Fields, and Sciences. Programs must also offer courses individually and as a full diploma package. Upon completion of the learning, students should have the opportunity to demonstrate their mastery with a rigorous assessment that could culminate in credit through academically competitive colleges and universities.

The program must have or be actively in the process of developing a clear scope and sequence of support through its framework for instruction for students and teachers to identify and prepare students with potential in earlier grades (prior to the 9th grade), so schools can increase the percentage of KCS students in advanced coursework. Proposers must provide a comprehensive narrative statement detailing the scope and sequence of support utilized. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.

The program additionally should include services and supports for school and district staff that will prepare them to facilitate student progress in the program. Professional learning and training should include teachers as well as other staff members and administrators for schools and the district. The vendor must provide sustainable professional development through in-person trainings, with options for virtual meetings/trainings or video resources. There should also be teacher support materials provided digitally and/or in person which support the academic rigor of the program.

4.5 **DELIVERY OF SERVICE:** Proposers must provide comprehensive narrative statements that outline the implementation plan for their program. The implementation plan should clearly support, streamline and provide accountability for the identified deliverables. This plan may include operational recommendations for KCS that will improve the efficiency and efficacy of the program.

The program deliverables include:

- Supports for student content and skill development beginning minimally in the 9th grade.
- Alignment with Early Postsecondary Opportunities (EPSO).
- Opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit through both individual and full diploma package courses with rigorous assessments that may culminate in postsecondary credit, aligning with university admissions guidelines;
- Courses/curricular frameworks for multiple content areas including Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences with discipline specific critical thinking, inquiry, reasoning and communication skills.
- A scope and sequence of support, either in place or in development, utilized to identify student potential prior to the 9th grade that can increase the percentage of students in underserved populations in advanced coursework.
- Services and supports that prepare school and district staff to facilitate student progress in the program through in-person trainings with options for virtual meetings/training and video resources.

- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

4.6 **EXPERIENCE:** Proposers are to detail their organization's previous experience working with schools, districts, states, and/or countries to promote high levels of academic rigor for all learners which results in the opportunity to earn postsecondary credit. For applicable team members, proposers are to submit education credentials and relevant work experience that supports the program sought by this RFP. This information is to be submitted in Section V, Tab V of the Proposal.

Proposers must provide three (3) references relating to work of a similar scope completed within the last five (5) years. Include the name of the agency or institution, point of contact with both a telephone number and email address, and the nature and size of the Contract. **Do not list Knox County Government or Knox County Schools as a reference.** References shall be submitted on Attachment B of this RFP.

SECTION V PROPOSAL FORMAT

PROPOSAL INFORMATION: The following guidelines should be followed when responding to the Request for Proposal. Negligence in adhering to the criteria listed below will be considered when reviewing the responses and evaluating the proposers. Knox County reserves the right to reject any proposal for failure to comply with the requested response specifications. The County reserve the right to amend the Request for Proposal by addendum prior to the final date of proposal submission.

- Knox County requests proposals be in sufficient detail to address all requirements.
- The County requests responses be submitted in a three-ring binder containing sections separated by tabs. Do not submit spiral bound or glued responses.
- Please submit one (1) marked original and one (1) exact copy.
- Page numbers should be placed on the bottom center of pages.
- Proposers shall also submit an exact copy of the original proposal on a Flash drive. **This shall be in one (1) complete pdf file. Do not include multiple folders on the Flash drive.**

PROPOSERS MUST HAVE THEIR BINDERS IN THE EXACT FORMAT LISTED BELOW.
Each proposal must address all questions/statements listed in each tab completely.

TAB I COVER LETTER

Include cover letter authorizing the submission of the proposal signed by the principal of the company.

TAB II COMPANY PROFILE

- Company Name, Address Telephone/Fax numbers
- Contact name(s) and information
- Proposer's Vendor Number as assigned by Knox County
- Employer Identification Number (EIN)
- Knox County Business Tax License for Organization (if applicable)
- Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)
- Will you accept E-commerce for payment as detailed in Section 1.14?
- Acknowledgement of the receipt of any Addendum issued

TAB III PROGRAM CONTENT & METHODOLOGY (30 Points)

Proposers must demonstrate an understanding of Knox County's needs and fully explain their overall approach to meet the County's requirements. This must thoroughly describe how the proposed services will meet the requirements outlined in Section 4.4. Proposer must clearly address the following:

- Describe how the program aligns with Early Postsecondary Opportunities (EPSO).
- Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit.
- Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills.
- Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered.
- Describe the courses that are offered individually as well as those that are offered as a full diploma package.
- Outline the assessment process(es) and opportunities to earn college/university credit.
- Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.
- Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program
  - Detail the professional development models available and teacher support materials associated with the program.
- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

TAB IV **DELIVERY OF SERVICES (30 POINTS)**

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule.

- Courses/curricular frameworks for multiple content areas;
- Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines;
- Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;
- Training and/or professional learning offerings about the services and supports included in the program; and
- Supports for student content and skill development beginning minimally in the 9th grade.
- Proposers do not have to provide complete curriculum. Samples are sufficient.

TAB V **EXPERIENCE AND REFERENCES (20 Points)**

Proposers are to detail the Company's experience relating to the services requested in this RFP, specifically:

- Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s).
- Proposers must describe the organization's experience with similar projects.
- Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP. Information about each person listed should include their a) title b) resume, including advanced education credentials, relevant work experience, demonstrated outcomes, independent research, and publishing in the subject areas addressed by this RFP, as applicable c) number of years with the organization and d) description of the type of work the individual will perform
- References (Attachment B)

TAB VI **PROPOSED COSTS (20 Points)**

Costs proposals must include all direct and indirect costs associated with the performance of the service. Proposed costs should be inclusive of all expenses. Proposer may include the methodology used to determine their proposed cost. Pricing must include all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. There will be no reimbursement for any such charges.

Per Attachment A, please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- Annual Candidacy/Membership Fees
- School Application Fees
- Annual Program or Curriculum Fees
- Curricular Materials
- Exam Fees
- Professional Development (inclusive of materials and travel expenses, as applicable)
  - o On-Site Format
  - o Webinar/Virtual Format
- Other Expenses
- Optional Features/Add-Ons

NOTE: This tab shall only be included in the original document and the exact electronic version. This tab is to be submitted under separate cover from the other parts of the vendor's proposal. This tab will be reviewed after the other sections of the vendor's proposal have been reviewed and scored.

TAB VII **OTHER INFORMATION**

Proposers may include any other information deemed pertinent to this solicitation.

TAB VIII **EXCEPTIONS**

Please note any and all exceptions taken to any part this Request for Proposal. If none are taken, please clearly state so. Do not mark through or otherwise alter the language of this RFP in your response.

TAB IX **ATTACHMENTS**

- Pricing (Attachment A)
- Insurance Checklist (Attachment C)
- Criminal History Check Affidavit (Attachment D)
- Iran Divestment Act (Attachment E)
- General Federal Funding Requirements (Exhibit A)

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$_____per school Notes:
Application Fees	$_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes:
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students:
Exam Fees	$_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site • Webinar/Virtual
Other Expenses:	
Optional Features/Add-ons:	

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: _____

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident) $1,000,000 BODY INJURY (Per–Person) BODY INJURY (Per-Accident) PROPERTY DAMAGE (Per-Accident
YES	4.	COMMERCIAL GENERAL LIABILITY	LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE $ 1,000,000
			FIRE LEGAL LIABILITY $ 100,000
			MED EXP (Per person) $ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY $ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE $ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE $ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2.000.000 ANNUAL AGGREGATE
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000
NO		PROFESSIONAL LIABILITY	
NO NO NO NO	10.	ARCHITECTS &ENGINEERS ASBESTOS & REMOVAL LIABILITY MEDICAL MALPRACTICE MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM $2,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)
NO	13.	MOTOR CARGO INSURANCE	
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$
NO	17.	DISHONESTY BOND	$
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.
NO	19.	USL&H	FEDERAL STATUTORY LIMITS

20. Carrier rating shall be Best's Rating of A-VII or better or its equivalent.

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.

23. Certificate of Insurance shall show the RFP number and title.

Insurance Agent's Statement and certification: I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.

Agency Name: _____Authorizing Signature: _____

Proposer's Statement and Certification: If awarded the Contract, I will comply with the Contract insurance requirements.

Proposer's Name: _____Authorizing Signature: _____

ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, _____, president or other principal

Officer of _____, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

_____
President or Principal Officer

For: _____
Name of Company

STATE OF TENNESSEE}
COUNTY OF }

Subscribed and sworn before me by _____,

President or principal officer of _____,

On this _____ day of _____ 2_____.

_____
Notary Public

My Commission expires: _____

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying,'' in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

OFFICE OF COUNTY MAYOR GLENN JACOBS

Procurement Division, 1000 N. Central Street, Suite 100, Knoxville, TN 37917

ADDENDUM I
REQUEST FOR PROPOSAL 3688
ADVANCED ACADEMIC PROGRAMS

ADDENDUM DATE: September 30, 2025

BUYER: Jay Garrison, CPPO, CPPB

ORIGINAL CLOSING DATE: October 14, 2025 at 2:00 PM

THE FOLLOWING IS TO BE AMENDED:

ATTACHMENT A, COST, WILL BE DELETED AND REPLACED WITH A NEW COST SHEET. SEE ATTACHED. FAILURE TO PROVIDE THE REVISED COST SHEET AND ALL REQUIRED ITEMS WILL BE JUST CAUSE TO DEEM YOUR SUBMITTAL AS NONRESPONSIVE.

SECTION 3.4 SHALL BE AMENDED TO THE FOLLOWING:

AWARD LENGTH: Knox County intends to issue a one (1) year award with an option to renew upon consent of both Knox County and the awarded Contractor. This term bid agreement may be renewed for an additional four (4) years, one (1) year at a time for a possible total of five (5) years. Knox County reserves the right to revoke the award if a pattern of unavailability arises with the successful proposer(s).

SECTION 3.29 SHALL BE AMENDED TO THE FOLLOWING:

PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of twelve (12) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

THE FOLLOWING IS FOR CLARIFICATION:

QUESTION 1: Could you please clarify whether the accrediting organization that issues any certifications to students must be Tennessee-based, or if national accreditation is acceptable?

ANSWER 1: National accreditation is acceptable.

QUESTION 2: We understand that Knox County intends to draft the contract. As a global provider of specialist exam services, we typically begin with a bespoke contract template that includes essential terms specific to our services—such as exam security protocols—which may not be covered in a standard agreement. This template has been successfully used as a starting point with many U.S. districts. For efficiency during the contracting phase, would Knox County be amenable to reviewing and potentially using our template as the basis for the agreement?

ANSWER 2: The County's Contract will take precedence over all other Contract documents. Proposers may submit a separate document with other terms and conditions, however, conflicting terms and conditions between the County's Contract and any other agreement will be governed by the County's Contract.

QUESTION 3: The RFP references Exhibit B as a sample contract, but it appears to be missing from the document. Could you kindly provide a copy?

ANSWER 3: See attached.

QUESTION 4: The RFP requests fixed pricing for the initial 36-month term. We typically offer fixed pricing with an annual inflationary adjustment. Could you advise on how Knox County would prefer suppliers to address inflationary increases in their proposals?

ANSWER 4: Knox County is amending this requirement to require fixed pricing for a period of 12 months from the date of contract commencement. No cost increases will be granted during any term of the contract.

QUESTION 5: Could you please clarify what is meant by "unit price" in this context? Is it intended to refer to pricing per student, per exam, per school, or another metric?

ANSWER 5: This requirement has been amended per the revised Cost sheet. See attached.

QUESTION 6: We have reviewed the Appendix C insurance requirements. Because we are an entity headquartered in the UK, we may not be able to comply with all of these requirements. Where we may need derogations e.g. it may not be possible to name you as an additional insured, how should we indicate this?

ANSWER 6: This requirement cannot be waived. The County must be named additionally insured on the policy. Upon a notice of award to a proposer(s), the successful proposer(s) will be required to submit a current Certificate of Insurance along with all endorsement pages naming Knox County as additionally insured.

QUESTION 7: Do you want us to list all the AP courses that Knox has currently bought from us?

ANSWER 7: No. This is a new, standalone solicitation and previous experience with Knox County will not be considered.

QUESTION 8: In regards to samples, we were going to send one copy of each course student edition. Do you require digital access as well?

ANSWER 8: Digital access is not required, but acceptable.

QUESTION 9: Would the district consider an all-digital platform to fulfill this RFP's scope of work?

ANSWER 9: No. The County will not accept an all-digital platform.

QUESTION 10: Can the curriculum be supplemental to the courses or must it be core curriculum?

ANSWER 10: The curriculum can be supplemental.

End of addendum.

Jay Garrison, CPPO, CPPB
Procurement Coordinator

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost.
- Digital resources that the teachers and/or students would need to fully implement the program.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost).
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost).
- Software Services

Total cost for the scenario: $_____

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

Exhibit B

Knox County Government

and

(Contractor)

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and (Contractor), hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. Terms of this Contract. This Contract commences on the 1st day of December 2025 and ends the 30th day of November 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. The County intends to issue a one-year (1) award. Upon the mutual agreement of the vendor and the County, the award may be extended for four (4) additional years, one (1) year at a time. This may result in a total of five (5) years. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. Subcontracting/partnerships: Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. Payment. Contractor warrants that the pricing shall remain firm for the initial one (1) year period. At the end of the first one (1) year period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a

SAMPLE

Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. Right to inspect. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. Nondiscrimination and non-conflict statements. Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. Books and records. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding

of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the

SAMPLE

Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, Terms and Conditions, etc., for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____

BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**

MAYOR – Signature **MAYOR**

Date:_____

SAMPLE

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO._____
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

_____
LAW DIRECTOR – Signature

_____
LAW DIRECTOR – Printed Name

Date:_____

CONTRACTOR

_____
AUTHORIZED SIGNATURE

_____
CONTRACTOR – Printed Name

(CONTRACTOR)
COMPANY NAME

Date:_____

SAMPLE

CollegeBoard

Advanced Academics Program Proposal #3688

DUE DATE:
October 14, 2025

PREPARED FOR:
Knox County Schools

TRANSMITTED BY:
Jackie Schulman, Associate Director, Proposal Development
jschulman@collegeboard.org

PRIMARY CONTACT:
Stephanie Tate, Director, K-12
state@collegeboard.org

College Board
250 Vesey Street New York, NY 10281
RFPTeam@collegeboard.org

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TAB I COVER LETTER

CollegeBoard

September 30, 2025

Proposal Number 3688
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, Tennessee 37917

Regarding: Proposal Number 3688, Advanced Academics Program

Via Federal Express

To Whom It May Concern:

College Board is pleased to submit its proposal for Advanced Placement Program, in response to Procurement Division of Knox County's Proposal Number 3688.

College Board is a mission-driven, not-for-profit organization that connects students to college success and opportunity. Founded in 1900, the College Board was created to expand access to higher education. Today, the membership association is made up of over 6,000 of the world's leading educational institutions and is dedicated to promoting excellence and equity in education.

Each year, College Board helps more than seven million students prepare for a successful transition to college through programs and services in college readiness and college success — including the SAT and the Advanced Placement Program. The organization also serves the education community through research and advocacy on behalf of students, educators and schools.

To meet Knox County's needs, College Board is committed to providing the following for its students:

AP® exams, AP Capstone™, SAT® School Day, PSAT/NMSQT®, PSAT™ 10, PSAT™ 8/9, Pre-AP®, CLEP®, Pre-AP® Professional Learning, AP® Professional Learning, and AP Career Kickstart™ Professional Learning.

We are confident that Knox County will recognize College Board's qualifications to provide the services and resources required to support this bid specification.

We look forward to working with you on this important endeavor.

Sincerely,

Jeremy Singer
President

The included prices for College Board tests, services and deliverables are based on the proposed prices for the 2025-26 school year. Any references to prices for subsequent years are solely for projection purposes and may be subject to change based on College Board's then-current costs, policies and procedures. **Clients are required to accept College Board's terms and conditions to purchase and use any contracted services. College Board is willing to negotiate a contract template to use for any orders for its services.**

Any contractual relationship between College Board and the district is subject to College Board's standard terms and conditions with respect to data, licensing, and intellectual property.

College Board is the exclusive owner of all rights in and to the examinations (including the questions), instructional material, online tools, publications, workshops and workshop materials including all copyrights, trademarks, and other similar proprietary rights.

College Board utilizes certain existing vendors – ETS, Pearson, and Alorica - in connection with our assessments. These businesses perform certain work associated with implementing the assessments based upon specialized expertise and experience in carrying out the required services. College Board has long-term agreements with these businesses to provide assessment-related operational and other services across all national assessments.

If College Board is selected to furnish goods and services for this RFP then the aforementioned College Board's programs, services, exams and data shall be provided in accordance with College Board's current standard terms, conditions, policies and procedures, including without limitation, provisions on the licensing of College Board intellectual property and data.

©2025 College Board. College Board, ACCUPLACER®, Advanced Placement®, Advanced Placement Program, AP®, AP Potential™, Pre-AP®, CLEP®, PSAT™ 10, PSAT™ 8/9, SAT®, SpringBoard®, and WritePlacer™ are trademarks of College Board. PSAT/NMSQT® is a registered trademark of College Board and National Merit Scholarship Corporation. Visit College Board on the web: www.collegeboard.org

TAB II COMPANY PROFILE

Company Name, Address Telephone/Fax numbers

College Board

250 Vesey St., New York, NY 10281

212-520-8667

212-713-8157

Contact name(s) and information

Stephanie Tate

Director, K-12

state@collegeboard.org

(850) 521-4924

Proposer's Vendor Number as assigned by Knox County

24754

Employer Identification Number (EIN)

13-1623965

Knox County Business Tax License for Organization (if applicable)

N/A

Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)

N/A

Will you accept E-commerce for payment as detailed in Section 1.14?

Yes

Acknowledgement of the receipt of any Addendum issued

Not Applicable

TAB III PROGRAM CONTENT & METHODOLOGY

Describe how the program aligns with Early Postsecondary Opportunities (EPSO).Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit. Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills. Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered. Describe the courses that are offered individually as well as those that are offered as a full diploma package. Outline the assessment process(es) and opportunities to earn college/university credit. Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion. Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program Detail the professional development models available and teacher support materials associated with the program. Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

For more than 5 years, Knox County Schools and College Board have worked together to support student success. We are proud of our long-standing partnership to provide opportunities to Knox County Schools students—and the foundation we've laid together for the future.

The Tennessee Department of Education's Ready Graduate Indicator includes the following College Board programs as Early Postsecondary Opportunities that can be used to capture evidence of student performance beyond academic proficiency: Advanced Placement (AP®) and College Level Examination (CLEP®).

In support of increased access and opportunity to EPSO's College Board proposes each of the below listed programs:

- Advanced Placement (AP), including AP Career Kickstart
- Pre AP™
- AP and Pre AP Professional Learning
- SAT ® Suite of Assessments (SAT ®, PSAT™ 10, PSAT/NMSQT ®, PSAT™ 8/9)
- CLEP®

These assessments and programs:

- Measure students' readiness for postsecondary education and career opportunities.
- Align with state and national college readiness benchmarks.
- Offer predictive insights into students' future academic performance in higher education.
- Provide opportunities for students to earn college credit or advanced course placement based on performance.
- Include comprehensive score reporting for students, educators, and families to support data-driven instruction and postsecondary planning.
- Offer professional development and resources to support educators in preparing students for success beyond high school.
- Have been designed and developed based on extensive research about college and career readiness and in consultation with K-12 and higher education experts.

College Board has decades of experience supporting schools, districts, higher education institutions, state agencies and policy makers achieve their vision and goals for college and career readiness. Throughout this proposal, the quality of programs and services, our experience supporting school districts and our unparalleled expertise in delivering world-class assessments at scale will demonstrate why College Board is the best partner for Knox County Schools.

SAT Suite of Assessments

College Board has many years of experience in delivering the SAT Suite of Assessments (SAT Suite) at scale to districts and states. As of 2024, the SAT Suite is a fully digital test, administered on Bluebook™, College Board's custom built student testing application. These tests have been pressure-tested at scale: More than 9.1 million students have already taken one of the digital assessments in the SAT Suite. In October 2023, Bluebook delivered the largest ever digital test with nearly 1.25 million students testing on a single day, which is almost as many assessments delivered *annually* by other assessment companies, collectively.

The digital SAT Suite represents an evolution of the SAT Suite that debuted in the 2015–2016 academic year. The digital suite was designed to be responsive to the changing educational landscape as well as the emerging needs of students and their families, teachers, state and district users, higher education officials, and policymakers.

The digital SAT Suite:

- Measures the skills and knowledge that students are learning in school and that matter most for college and career readiness
- Allows students and educators to track growth via an integrated, vertically scaled suite of assessments from grade 8 through high school and a series of empirically derived benchmark scores aligned with college and career readiness requirements
- Supports students' readiness for test day and their development of relevant knowledge and skills through free, world-class practice resources, including Official Digital SAT Prep on Khan Academy®
- Connects students to scholarships

- Recognizes the strong academic performance of students through the College Board National Recognition Program
- Supports all students who need accommodations and/or supports to access the tests and their content

AP

The Advanced Placement (AP) Program, administered by College Board, has a long-standing track record of delivering rigorous, large-scale, standardized assessments that are aligned with nationally recognized college-level curricula and informed by state and national academic standards. In 1956, during the first AP Exam administration, 1,229 students sat for 2,199 AP Exams. By 2024, those numbers had grown to over 3 million students sitting for over 5.7 million exams. Students who choose to take the exam at the end of the course will register with College Board to sit for that exam. Each AP Exam is developed and validated by committees of college faculty and experienced AP teachers to ensure alignment with current postsecondary expectations and high school instructional goals. Through its comprehensive and equitable assessment framework, the AP Program supports college readiness by reliably measuring student mastery of course content and skills, while maintaining strict psychometric standards and robust quality control processes at scale.

The AP Program:

- Provides scalable, reliable assessment solutions that serve millions of students annually
- Aligns with widely accepted national and state academic standards
- Delivers actionable performance data to inform district-level curriculum and instruction
- Supports access through tools like AP Potential, fee reductions, and educator training
- Enhances college and career readiness by helping students earn credit and demonstrate postsecondary preparedness
- Equips teachers with instructional resources, including AP Classroom and professional development
- Meets accountability and reporting needs with recognized, standards-based outcome measures
- Is widely recognized by college and universities for credit, placement, and admissions decisions, with over 90% of US institutions accepting qualifying AP scores

AP Career Kickstart

AP Career Kickstart expands the AP Program by offering high schools a new set of career courses and exams. We're partnering with employers, college faculty, and high school educators to design courses that can lead to college credit and employer-endorsed credentials, and prepare students for high-demand jobs.

Career Kickstart courses are powered by the AP® features that educators value: robust teacher training, dedicated educator communities, free student resources, high-quality assessments, and the broadest national network of college credit policies. Career Kickstart courses emphasize hands-on experience, teach professional and technical skills, and align to CTE standards and credentials valued by industry.

Career Kickstart courses prepare students through:

- **Applied, career-connected learning**: Classes engage students in hands-on learning experiences that connect to real-world applications of course content.

- **Co-developed with industry experts**: Career Kickstart courses are co-developed with leaders from industry to ensure that the courses are aligned with industry hiring needs and industry-recognized credentials.
- **Professional skills**: Career Kickstart courses teach professional skills (such as communication, problem solving, and collaboration) that are critical in the workplace.
- **Credentials**: Career Kickstart courses map to industry-preferred IRCs that we know can jumpstart a student's career-planning and trajectory.

CLEP

College Board's nationally administered College-Level Examination Program (CLEP) allows students to demonstrate their mastery of introductory college-level material and receive college credit by earning qualifying scores on 34 exams. There are no preset exam administration dates, so exams can be taken year-round when students are ready.

- The American Council on Education regularly evaluates CLEP processes and procedures for developing, administering, and scoring the exams. Effective July 2001, ACE recommended a uniform credit-granting score of 50 across all subjects (with additional Level-2 recommendations for the world language exams), representing the performance of students who earn a grade of C in the corresponding college courses. Every test title has a minimum scale score of 20, a maximum scale score of 80 and a cut score of 50. Most CLEP exams are designed to correspond to one-semester college courses, although some exams correspond to full-year or two-year courses. While CLEP is sponsored by College Board, only colleges may grant credit toward a degree. Each college or university determines how CLEP credit will be awarded.
- The CLEP program's test development process is informed by the conviction that the exams must be rigorous and relevant to their respective disciplines. CLEP offers 34 exams that cover introductory college course material in five broad categories including Composition and Literature, Science and Mathematics, World Languages, History and Social Sciences, and Business. Each exam has a standing test development committee that consists of three or four college faculty members, each of whom teaches the relevant course and oversees ongoing test development.
- The process is supported by scientific validation and empirical evident at every step, from test development through administration and scoring.

Pre-AP

Pre-AP courses deliver grade-level appropriate instruction through focused course frameworks, instructional resources, learning checkpoints, and collaborative educator workshops. They are designed to support all students across varying levels of abilities through focus. They are not honors or advanced courses. The Program grants educators and their students the space and time for deep engagement with content.

Pre-AP challenges students to build critical thinking skills through these shared principles:

- **Close Observation and Analysis:** Students carefully observe a data set, text, image, or problem--capturing relevant details before attempting to explain, analyze, or evaluate.
- **Evidence-Based Writing:** Students learn to craft precise sentences before progressing to longer forms of writing—applying these skills as they craft claims, develop arguments, and provide explanations.

- **Higher-Order Questioning:** Students engage with questions that are elevated beyond simple recall as they make predictions, synthesize, evaluate, and compare–learning that deep questions lead to deeper understanding.
- **Academic Conversation:** Students become active participants in their own learning through frequent opportunities to compare, critique, debate, and build upon others' ideas--recognizing that all voices, including their own, deserve to be heard.

AP Professional Learning

AP Professional Learning offerings incorporate tiered objectives and techniques that ensure effective strategies for reform, rigor, college readiness, and school improvement. AP® subject workshops help AP teachers plan and focus their instruction and earn continuing education units (CEU). The workshops cover the following topics:

- **Course and Exam Description (CED) and Course Planning**. Discuss developing a semester and/or yearlong instructional plan that incorporates all units, topics, and skills of the course, as referenced in the CED.
- **Expanding AP Opportunities**. Discuss strategies to create a supportive AP classroom for all students and to encourage students to participate in AP, including underrepresented students. Strategies and Pedagogical Tools: Identify instructional strategies and tools to teach the content and skills in the course and exam description.
- **AP Classroom and AP Daily**. Explore how AP Classroom can be utilized to develop each skill/practice and develop lesson plans that reinforce topic and skill connections. AP Daily videos are led by experienced AP teachers to help students understand essential course concepts. The videos are short and available on-demand. •
- **Assess and Reflect**. Practice interpreting data within the Instructional Planning Report to identify student strengths and weaknesses and reflect on implications for instruction.

For detailed information and AP Professional Learning offerings, please see our AP Professional Learning Catalog.

https://apcentral.collegeboard.org/media/pdf/ap-professional-learning-workshop-offerings.pdf

Pre-AP Professional Learning

Pre-AP Professional Learning aligns with best practices in adult learning theory. At the core of our services is the mission to increase equity and access for all students.
Our participants work through objectives that are engaging, active, and easily transferable into classroom practices. Educator expertise is respected and expanded by prioritizing collaboration with diverse colleagues and promoting sharing, application, and reflection. Participants are given space to plan and apply strategies to their own classrooms and circumstances.
Pre-AP offers a range of professional learning opportunities customized for your role and level of experience with the Pre-AP Program:

- **Building Readiness.** Created for all teachers and leaders of grades 6—12, these workshops introduce the design and pedagogy of the Pre-AP Program—empowering participants to apply Pre-AP principles to their own content, grade level, and school.

- **Building the Foundation.** Created for teachers, leaders, and coordinators new to Pre-AP courses. Institutes and modules introduce course teachers, leaders, and coordinators to the Pre-AP Approach to Teaching and Learning and prepare them to start building courses at their schools.
- **Building Expertise.** Created for experienced Pre-AP course teachers and leaders who teach or lead Pre-AP courses and have completed foundational professional learning. Focused workshops, modules, and observations develop educators' expertise in best classroom practices that support the needs of all students on the road to achieving their goals in Pre-AP and beyond.

For detailed information and Pre-AP Professional Learning offerings, please see our Pre-AP Professional Learning Catalog.
https://rise.articulate.com/share/WhsiA-7rmxVX9NKJPOClDXZuLVCvlBWU#/lessons/23EZHAvoYhaWEcdygksryzRWvizltdZa

TAB IV DELIVERY OF SERVICES

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule. Courses/curricular frameworks for multiple content areas; Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines; Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks; Training and/or professional learning offerings about the services and supports included in the program; and Supports for student content and skill development beginning minimally in the 9th grade. Proposers do not have to provide complete curriculum. Samples are sufficient.

In collaboration with Knox County, College Board will develop a comprehensive project plan that will clearly detail all aspects of the implementation, responsibilities and timelines. Through regular meetings, College Board and Knox County will utilize the project plan to monitor the progress of the implementation.

SAT Suite of Assessments

A member of College Board's State and District Partnership team will work with the District Assessment Coordinator to create an implementation plan based on the district's testing schedule, share key milestones and actions required for testing, and assist the district with the use of tools and systems to monitor testing readiness and progress.

Figure 01: Key Milestones for SAT Suite of Assessments (subject to change annually)

Fall Digital SATSD, PSAT/NMSQT & PSAT 8/9 Testing Window: October 1, 2025 - October 31, 2025					
ACTIVITIES	**October 1–3**	**October 6–11***	**October 14–17**	**October 20–24**	**October 27–31**
Ordering Opens in SSOR	5/1/2025				
SSD Request By (7 weeks before test day)	8/11/2025	8/18/2025	8/25/2025	9/2/2025	9/8/2025
Submit Order By (5 weeks before test day)	8/25/2025	9/2/2025	9/8/2025	9/15/2025	9/22/2025
Registration Opens in SSOR	September				
Submit Initial Registration File By (4 weeks before test day)	9/2/2025	9/8/2025	9/15/2025	9/22/2025	9/29/2025
Validate Registration By (3 weeks before test day)	9/8/2025	9/15/2025	9/22/2025	9/29/2025	10/6/2025
Readiness Check (2 weeks before test day)	9/15/2025	9/22/2025	9/29/2025	10/6/2025	10/14/2025
Last Day to Order/Register a Student for Retest	9/30/2025				
Submit AI Code Request Form By	8/30/2025				
Coordinator/Proctor Training Available Online	8/25/2025				
Coordinator Test Day Readiness Webinars	September				
Invoicing - Auto Generated Remittances	11/13/2025				
K-12 Score Release	10/21/2025				
Student Score Release	10/23/2025				
Electronic Score Release	10/29/2025				
K-12 Score Release			11/5/2025		
Student Score Release			11/6/2025		
Electronic Score Release			11/12/2025		
K-12 Score Release					11/12/2025
Student Score Release					11/13/2025
Electronic Score Release					11/19/2025

In addition, district and school testing coordinators will be provided with the digital testing readiness checklist. The district will be able to monitor the completion of key readiness tasks via the District Readiness Dashboard in the SAT Suite Ordering and Registration (SSOR) system.

Assigned College Board staff are available to offer guidance and support to district assessment staff regarding their college and career assessment strategy, implementation best practices, and with monitoring readiness and testing progress and troubleshooting any issues or questions that arise.

AP

A member of College Board's State and District Partnership team will work with the District Assessment Coordinator to create an implementation plan based on the district's AP offerings and assist the district with the use of tools and systems to monitor testing readiness and progress.

At the beginning of each academic year, key milestones and actions required will be shared with the district. A sample of key milestone for the 2025-26 school year is provided below and is subject to change. Note that fulfilling exam ordering is only completed by schools and districts for students who have opted to take an AP exam and registered first with College Board. AP exams are only delivered to those students who have registered with College Board.

Figure 02: Key Milestones for AP

Deadline	Critical Milestones
July 1, 2025	Teachers can access **AP Classroom** for the upcoming school year.
August 1, 2025	Principals and AP coordinators receive an email with the access code coordinators need to access AP Registration and Ordering for the school year. If both are new, contact **AP Services for Educators** or call 1-877-274-6474.
October 3, 2025	This is the recommended deadline to review exam registration rosters in **AP Registration and Ordering**, make needed changes, and confirm and submit your exam order. Orders may be updated, and changes submitted without additional fees until the final ordering deadline. We recommend that you complete student enrollments by this date.
November 14, 2025 (11:59 p.m. ET)	Final deadline to submit your exam order for all full-year and first-semester AP courses, and all exam only sections, without incurring additional fees. Exams can be ordered or canceled after this date, although a fee applies in some cases.
January 24, 2026	AP accommodations request deadline. Learn more about **requesting accommodations for AP Exams** on AP Central.
January 31, 2026	Deadline for teachers and AP Course Audit administrators to complete **AP Course Audit** process for the current school year.
March 1, 2026	**AP Course Audit** System opens for the upcoming school year.
March 13, 2026 (11:59 p.m. ET)	Deadline to order all exams for AP courses that begin after November 15 and to update fall orders (fees may apply for changes made to fall orders). Schools are encouraged to submit any known cancellations by this date to ensure timely processing and accuracy of your exam shipment.
April 30, 2026 (11:59 p.m. ET)	Deadline to indicate students' fee reduction status in AP Registration and Ordering.
April 30, 2026 (11:59 p.m. ET)	Deadline for AP Seminar, AP Research, and AP Computer Science Principles performance tasks to be submitted. Authorized educators can find course-specific information and access the **AP Digital Portfolio** on AP Central.
May 5–9 and 12–16, 2026	Regularly scheduled AP Exam administration.
May 9, 2026 (8 p.m. ET)	Deadline for AP Art and Design students to submit their three portfolio components as final in the **AP Digital Portfolio**.
May 19–23, 2026	Late-testing AP Exam administration.
June 1, 2026	Deadline for all exam materials to be received by AP Services.
June 15, 2026	Postmark deadline for exam payment to the AP Program.
June 15, 2026	Deadline to indicate intended use for large-volume rebate in AP Registration and Ordering.
June 20, 2026	Deadline for students to indicate or change the recipient of their free score report through My AP.
July 2026	AP score reports are available to colleges, students, schools, and districts. Authorized users can access **AP Score Reports for Educators** on AP Central.

In addition, district and school testing coordinators will be provided with the digital testing readiness checklist. The district will be able to monitor the completion of key readiness tasks via the District Readiness Dashboard in the AP Registration and Ordering (APRO) platform.

Assigned College Board staff are available to offer guidance and support to district assessment staff regarding their AP Exam administration strategy, implementation best practices, and with monitoring readiness and testing progress and troubleshooting issues or questions that arise.

AP Professional Learning

AP Professional Learning will work with the host to determine the specific needs for their teachers and source a consultant to facilitate the workshops. In terms of implementation and reporting, workshops are managed through our Cvent registration which provides the following benefits:

- Host site receives a Cvent registration site dedicated to their event.
- Host site receives participant rosters one and two weeks out so they can check on teacher registrations and promote to those who not registered yet.
- Registration in our system provides access to electronic workshop materials. Host site may receive post-workshop participation reports.
- System sends out post-workshop survey to all registered attendees automatically.
- Completion of post-workshop survey generates auto-email with CEU certificate for each participant who completes it.
- Summary of post-workshop survey may be provided to host site upon request.

Additionally, a team is available to assist with trouble-shooting registration and survey issues.

Pre-AP

Pre-AP courses deliver grade-level-appropriate instruction through focused course frameworks, instructional resources, targeted assessments for learning, and collaborative educator workshops. They're designed to support all students. They're not honors or advanced courses.

Participating schools receive an official Pre-AP designation for each course and the opportunity to bring engaging and focused coursework to all their students across varying levels of abilities. The designation signals consistent, high standards that build and reinforce students' content knowledge and critical thinking skills.

Course Descriptions (or attached Pre-AP Course One Pager - All Courses) : https://pre-ap.collegeboard.org/courses/descriptions

Annual Pre-AP Calendar - These dates are subject to change.

Date	Action
January 27 – August 31	District and school administrators order Pre-AP for their school or district.
March 01	Teachers, administrators, and Pre-AP coordinators can begin registering for Pre-AP Summer Institutes.
March 01	Teachers can begin the Pre-AP Course Audit process, indicating which courses they are teaching and completing attestations.
March 01	Course Audit administrators complete the required attestations and begin approving Course Audit forms submitted by teachers. Returning teachers can be renewed.
June 01	Teachers can log into Pre-AP Classroom using the same account information they used to complete Course Audit.
June 01	Administrators and Pre-AP coordinators can log into Pre-AP Classroom using access codes found on the ordering website.
June	Pre-AP print materials begin shipping.
Summer	New teachers complete professional learning by attending a Pre-AP Summer Institute and/or completing the online modules. (The deadline for completing this professional learning is October 30.)

	Experienced teachers engage in professional learning through online modules.
Summer	Pre-AP coordinators complete the Online Coordinator Module.
Summer	New Pre-AP administrators complete professional learning by attending a Pre-AP Leadership Workshop for Administrators and/or completing the online modules for administrators. Experienced administrators engage in professional learning through online modules.
August–June	Teachers complete at least one online scoring module.
September–October	Teachers administer at least one learning checkpoint and the performance task at the appropriate time for Unit 1.
December–January	Teachers administer at least one learning checkpoint and the performance task at the appropriate time for Unit 2.
March–April	Teachers administer at least one learning checkpoint and the performance task at the appropriate time for Unit 3.
May–June	Teachers administer at least one learning checkpoint and the performance task at the appropriate time for Unit 4.

Note: Assessment schedules are for schools implementing a traditional, not block, schedule. If you are on a block or alternative schedule, you may follow a different schedule.

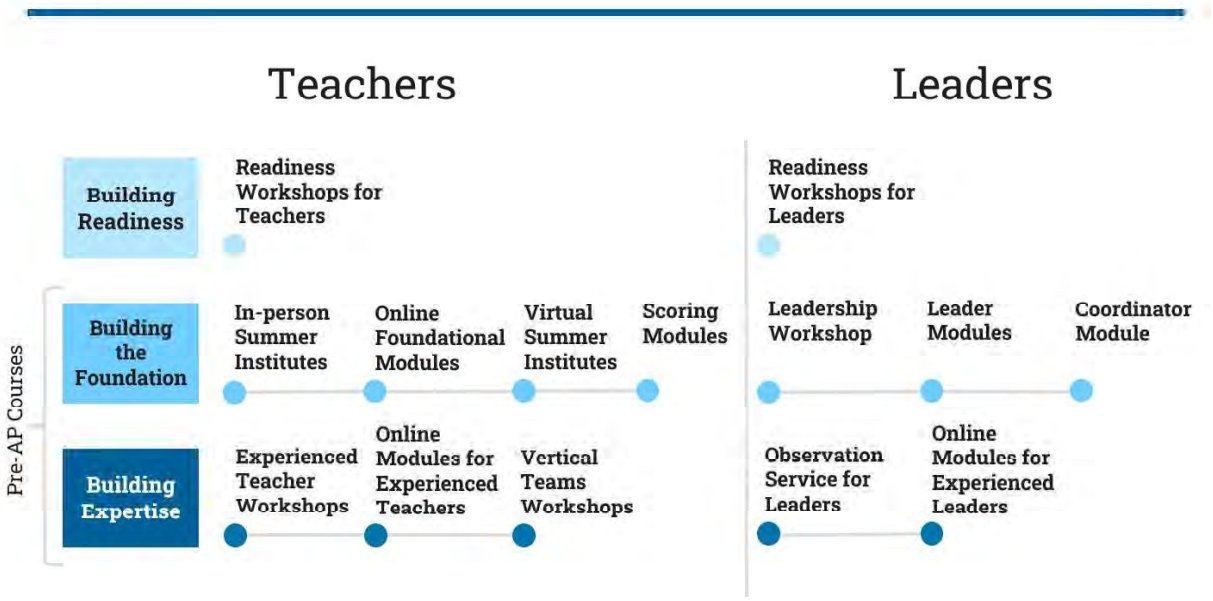
Pre-AP Support

SUPPORT NEEDED	CONTACT INFORMATION
College Board Account Support (e.g., password reset, account recovery)	A College Board account is required to access the Pre-AP teacher and coordinator communities and Pre-AP Classroom. Access sign-in and account support for professional and student accounts. https://pages.collegeboard.org/account-help Direct Support Phone: 877-262-7320 Call Center Hours: Mon.–Fri., 9 a.m.–7 p.m. ET
Pre-AP Classroom	Email: PreAP@collegeboard.org Additional resources are also available via Pre-AP Classroom. When logged in to Pre-AP Classroom, select Help to submit a message requesting assistance.
Pre-AP Teacher Communities	Technical Support Email: APCommunity@collegeboard.org Use the Teacher Community Access Instructions to request to join the Pre-AP teacher and coordinator communities.
Professional Learning	Email: PreAP@collegeboard.org Direct Support Phone: 877-262-7320

General Support	Email: PreAP@collegeboard.org

Pre-AP Professional Learning

Pre-AP offers a wide range of professional learning opportunities—from Pre-AP Readiness Workshops for any school curious about the program through Pre-AP Summer Institutes for teachers and leaders. Our participants work through objectives that are engaging, active, and easily transferable into classroom practices. Educator expertise is respected and expanded by prioritizing collaboration with diverse colleagues and promoting sharing, application, and reflection. Participants are given space to plan and apply strategies to their own classrooms and circumstances. Pre-AP Professional Learning aligns with best practices in adult learning theory. At the core of our services is the mission to increase equity and access for all students.



Building Readiness. Created for all teachers and leaders of grades 6—12, these workshops introduce the design and pedagogy of the Pre-AP Program—empowering participants to apply Pre-AP principles to their own content, grade level, and school.
Building the Foundation. Created for teachers, leaders, and coordinators new to Pre-AP courses. Institutes and modules introduce course teachers, leaders, and coordinators to the Pre-AP Approach to Teaching and Learning and prepare them to start building courses at their schools.

Building Expertise. Created for experienced Pre-AP course teachers and leaders who teach or lead Pre-AP courses and have completed foundational professional learning. Focused workshops, modules, and observations develop educators' expertise in best classroom practices that support the needs of all students on the road to achieving their goals in Pre-AP and beyond.

For detailed information and Pre-AP Professional Learning offerings, please see our Pre-AP Professional Learning Catalog.
https://rise.articulate.com/share/WhsiA-7rmxVX9NKJPOCIDXZuLVCvIBWU#/lessons/23EZHAvoYhaWEcdygksryzRWvizltdZa

TAB V EXPERIENCE AND REFERENCES

Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s). Proposers must describe the organization's experience with similar projects.

College Board is a mission-driven not-for-profit organization that connects students to college success and opportunity. College Board was founded in 1900 by representatives of twelve universities to create a common college entrance exam and expand access to higher education. That common college entrance exam, the SAT, was first administered in 1926. Today, the membership association is made up of over 6,000 of the world's leading educational institutions and is dedicated to promoting excellence and equity in education.

Each year, College Board helps more than seven million students prepare for a successful transition to college through programs and services in college readiness and college success — including the SAT® and the Advanced Placement Program®. The organization also serves the education community through research and advocacy on behalf of students, educators and schools.

College Board maintains two offices that are located in New York and Reston, Virginia and currently employ approximately 2,000 staff nationwide. Our staff includes a cadre of experts in assessment, psychometrics, logistics and customer support that are located throughout the country. College Board's Southern Region has staff in the state of Tennessee, connecting the educators of the state with the staff and resources of College Board to advance college readiness and success for students in Tennessee. Stephanie Tate is Knox County Schools's account manager and is available to support you along with other members of the Southern regional team.

Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP. Information about each person listed should include their a) title b) resume, including advanced education credentials, relevant work experience, demonstrated outcomes, independent research, and publishing in the subject areas addressed by this RFP, as applicable c) number of years with the organization and d) description of the type of work the individual will perform.

Stephanie Tate is the account manager for Knox County Schools who will support the successful implementation of College Board products and services.

Organizational Chart



References (Attachment B)

See attached resumes.

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: College Board

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: Alachua County School District
Contact Person: Todd "TJ" Spina Phone Number: (352) 955-7681
Email Address: spinatj@alachuaschools.net Fax Number:
Nature of Contract: Alachua County has administered the PSAT 8/9, PSAT/NMSQT(10th grade), SAT School Day,
Services Provided: and several other College Board programs and services.
Dollar amount: $ N/A (over life of contract)
Contract start date: 2018 Contract end date: current

NOTE: Due to privacy provisions, College Board cannot share dollar amount of our contracts.

Name of Firm: Memphis Shelby Schools
Contact Person: James Smith Phone Number: 901-416-3471
Email Address: smithjl@scsk12.org Fax Number:
Nature of Contract: Memphis Shelby Schools has administered the PSAT 8/9, PSAT/NMSQT (10th/11th grade),
Services Provided: and several other College Board programs and services.
Dollar amount: $ N/A (over life of contract)
Contract start date: 2014 Contract end date: current

NOTE: Due to privacy provisions, College Board cannot share dollar amount of our contracts.

Name of Firm: Metropolitan Nashville
Contact Person: Missy Humphrey Phone Number: (615) 973-3205
Email Address: missy.humphrey@mnps.org Fax Number:
Nature of Contract: Metropolitan Nashville has administered PSAT 8/9, PSAT/NMSQT (10th/11th grade),
Services Provided: Pre-AP, and other College Board programs and services.
Dollar amount: $ N/A (over life of contract)
Contract start date: 2014 Contract end date: current

NOTE: Due to privacy provisions, College Board cannot share dollar amount of our contracts.

DAVID A. GUPTA

[redacted]
dgupta@collegeboard.org

PROFESSIONAL EXPERIENCE

Vice President, South and Southwest Regions, College Board, December 2013 - Present

- Lead College Board's K-12 team in support of schools, districts, and states throughout the South and Southwest Regions, including AL, AR, FL, GA, KY, LA, MS, NC, NM, OK, SC, TN, TX, and VA

Interim Vice President, Western Region, College Board, July 2012 – November 2013

- Led College Board's K-12 team in support of schools, districts, and states throughout the Western Region, including AK, AZ, CA, CO, HI, ID, MT, NV, OR, UT, WA, and WY

Executive Director, Florida Partnership, College Board, January 2010 – November 2013

- Led the College Board's K-12 team in Florida

Senior Director, K-12, Midwest Region, College Board, July 2004 – January 2010

- Led the K-12 team in support of schools, districts, and states throughout the Midwest Region, including IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI, and WV

District Supervisor/Executive Director, Advanced Academic Programs, Miami-Dade County Public Schools, February 2001 – July 2004

Assistant Principal/Principal, South Miami Middle School, Miami-Dade County Public Schools, August 1996 - February 2001

Science Teacher/Department Chairperson, G. Holmes Braddock Senior High School, Miami-Dade County Public Schools, August 1993 - August 1996

EDUCATION

Florida International University, Miami, FL

- Ed.D. in Educational Administration and Supervision, August 1998
- M.S. in Science Education, December 1993
- B.S. in Biological Sciences, May 1992

Alexander G. Chavarry

678-670-6130 (cell)
achavarry@collegeboard.org

SUMMARY: **Highly motivated educator with a wealth of experience in the educational sales and leadership arena. Experiences include expansion and implementation support of products as well as team and territory supervision of open and adoption states. Entire professional career spanning 25 years has been spent in the education field.**

EXPERIENCE:

May 2014 – Present **The College Board,** *Southern Regional Office* Duluth, GA
Executive Director, K-12 Services

- Lead all K-12 matters in 10 southeastern states.
- Lead a team of field staff who work with district leaders to expand and implement College Board programs and services across the southeast.
- Report progress on goals and metrics to Regional Vice President.
- Achieve goals and metrics across various College Board programs and services.

August 2008-May 2014 **The College Board,** *Southern Regional Office* Duluth, GA
Senior Director, SpringBoard Strategic Accounts

- Manage and grow SpringBoard adoptions in 10 Southern Region states.
- Oversee and manage SpringBoard pipeline for Southern Region. Responsibilities include training SRO Educational Managers and assisting them in closing SpringBoard business.
- Lead adoption process and mobilization of SpringBoard Sales Managers in Florida, Georgia and North Carolina.
- Facilitate communication with New York Office and serve as primary liaison between program and region.

Jan 2006 – August 2008 **The College Board**, Southern Regional Office Duluth, GA
Senior Educational Manager

- Provide College Board programs and services to state entities as well as large and small districts.
- Ensure effective program delivery to all assigned state/district accounts.
- Sustain growth in programs such as PSAT/NMSQT, AP, and SpringBoard.
- Picower Foundation Grant Manager 2001-2006.

Mar 2001 – Jan 2006 **The College Board,** Florida Partnership Miami, FL
Senior Educational Manager

- Provide educational services to Florida districts and schools.
- Oversee delivery of SAT Readiness Program to 100+ Florida schools.
- Oversee College Board/Kaplan collaborative.

EDUCATION:

Florida International University Miami, FL
Master of Science, Secondary Mathematics Education, 1996

Florida State University Tallahassee, FL
Bachelor of Science, Secondary Mathematics Education, 2000

Tikini P. Thompson

(407) 252-8846 | tthompson@collegeboard.org

SUMMARY

Accomplished K–12 education leader with over 20 years of experience advancing college and career readiness through strategic partnerships, program expansion, and organizational leadership. Expertise in driving adoption of College Board resources, including the SAT Suite of Assessments and Advanced Placement (AP), while leading high-performing teams and executing multi-state strategies. Proven ability to cultivate relationships with senior education leaders, deliver innovative solutions, and achieve measurable growth across diverse districts and states.

PROFESSIONAL EXPERIENCE

College Board | Senior Director, K–12 | Aug 2021 – Present

- Lead a high-performing team of four to expand College Board programs across Florida and Tennessee, fostering a culture of collaboration, accountability, and results.
- Design and execute state and district strategies using data-driven insights to strengthen partnerships and promote college and career readiness.
- Build and manage executive-level relationships with superintendents, state agencies, and education leaders to ensure successful implementation of College Board programs.
- Oversee team training, coaching, and performance management to sustain growth and enhance consultative sales practices.
- Direct strategic initiatives and regional projects with executive leadership, aligning resources with long-term organizational goals and ensuring contract fulfillment.

College Board | Director | Mar 2017 – Aug 2021

- Expanded postsecondary access by leading the implementation of College Board programs in Florida districts, driving growth in SAT Suite and AP participation.
- Developed and executed customized strategies to align with district priorities and expand adoption.
- Secured long-term partnerships with superintendents and district leaders in large, complex districts.
- Designed and facilitated professional development to build K–12 educator capacity and support effective program delivery.

College Board | Associate Director | Jun 2015 – Mar 2017

- Directed account strategies across districts, aligning initiatives with state and regional education priorities.

- Grew participation in AP and SAT Suite programs, expanding College Board's reach and impact.
- Strengthened district partnerships and delivered workshops to increase educator effectiveness and student outcomes.
- Leveraged Salesforce CRM and cross-divisional collaboration to manage accounts, monitor performance, and identify growth opportunities.

Orange County Public Schools | District Instructional Coach, Literacy Coach, and Reading Teacher | 2001 – 2015

- Advanced student achievement through leadership roles across high-priority schools, driving measurable gains in reading and writing proficiency.
- Achieved double-digit improvements in state assessment scores, with Carver Middle School reaching 95% proficiency in writing.
- Designed and implemented curriculum tools, focus calendars, and lesson plans aligned with state standards and district priorities.
- Coached teachers and instructional staff, providing professional development, data analysis, and instructional planning support.
- Facilitated district-wide professional learning programs, including Common Core Blackbelt Practicums and Marzano's Art and Science of Teaching.
- Guided instructional improvement and School Improvement Plan development through evidence-based decision-making.

EDUCATION

M.Ed., Educational Leadership – American College of Education, 2012

M.A., English Language Arts – University of Central Florida, 2004

M.S., Criminal Justice – University of Central Florida, 2001

B.S., Criminal Justice (Minor: Legal Studies) – University of Central Florida, 1999

STEPHANIE TATE

state@collegeboard.org

8138430563

PROFESSIONAL SUMMARY

Eager to bring over 25 years of experience and a professional attitude to your company using a unique combination of national training experience and:

- A passion for education and deep commitment to the College Board's mission
- Built and maintained strong relationships with state and district partners
- Lead several statewide professional development opportunities through the Florida Partnership

SKILLS

- Verbal and Written Communication
- Trained others in higher level thinking skills by using Bloom's Taxonomy
- Skilled webinar and in person trainer
- Served on hiring teams
- Large event project management
- Manage Florida contract deliverables

EDUCATION

American College of Education
Indianapolis, IN • 06/2014

Masters Degree: Educational Leadership

University of South Florida
Tampa, FL • 05/1999

Bachelor of Science: Mathematics Education Grades 6-12

WORK HISTORY

College Board State & District Partnerships - Director
Remote- Florida • 04/2016 - Current
As a Director with College Board, I partner and collaborate with districts and schools throughout the state.

- Expand access to students through strategic implementation of College Board resources and tools in Florida districts.
- Assisted with managing the Florida Partnership budget and contract deliverables ($4 million annually).
- Service account management, which includes building deep relationships with district partners, assisting account strategies to meet district goals, assisting with resolution of issues (billing, implementation, delivery), and ensuring appropriate response by College Board programs.
- Author and facilitate professional development for key stakeholders in planning for a culture of readiness.
- Develop and manage collaborative relationships across the Florida Partnership to support work.
- Work with districts to strengthen and diversify the pipeline of students prepared to success in AP coursework through focus on essential knowledge and skills needed in coursework, advocating AP's use in college admissions and placement, AP Classroom trainings, parent nights and training district leaders.
- Serve as project management lead for large training events throughout the state of Florida.
- Support strong implementations of Pre-AP through a deep understanding of the Pre-AP Core Components (i.e. Pre-AP Classroom training, Pre-AP Coordinator training, Pre-AP Colloquium, etc.)
- Strategic use of Salesforce CRM to monitor progress towards goal, and to identify new opportunities as well as task management.

College Board Florida Partnership - Associate Director
Remote- Florida • 03/2013 - 04/2016

- Developed and monitored the use of a project board to view current and upcoming tasks for the team.
- Developed customized training for teachers and school leaders in a professional development suite with multi-disciplinary topics.
- Developed and manage collaborative relationships across the Florida Partnership to support work.
- Strengthened the pipeline access by overseeing the Middle Level Colloquium for key stakeholders in the Florida Partnership districts.
- Administered, coordinated, and provided quality control for all professional development delivered by the Florida Partnership.

School District Of Hillsborough County - Mathematics Teacher and Instructional Coach
Tampa, FL • 07/1999 - 03/2013

- Developed methods to motivate and engage students in learning.
- Collaborated with teachers, administrators and parents to determine how best to support student success.
- Met diverse student population needs by planning and implementing lessons with wide variety of teaching strategies.
- Taught using the SpringBoard Geometry and SpringBoard Algebra 1 curriculum with high school students.
- Planned and instructed each subject area using a wide variety of teaching aids, motivational and implementation strategies to engage students in active learning, including CRISS strategies, Kagan and SpringBoard strategies.
- Mu Alpha Theta sponsor and grader for Hillsborough County.
- Member of schools School Improvement Team, School Advisory Council co-chair, among other groups.
- Coached and supported teachers in the classroom by modeling, co-teaching and training.
- SpringBoard author for the Middle School Mathematics textbooks.

TAB VII OTHER INFORMATION

Attachment 1

AP Career Kickstart

Career Kickstart™

Powered by AP®

Career Kickstart — a new program from College Board—**aims to clear a path for students to own their future through career preparation.**

Career Kickstart™ is a new **career-focused program** that leads to **credentials and college credit** for all students who want to prepare for a career, whether they are heading to two- or four-year colleges, technical schools, or the workforce.

With a focus on **high-demand fields** like **cybersecurity**, Career Kickstart brings the best of Advanced Placement® to courses designed for career and technical education.

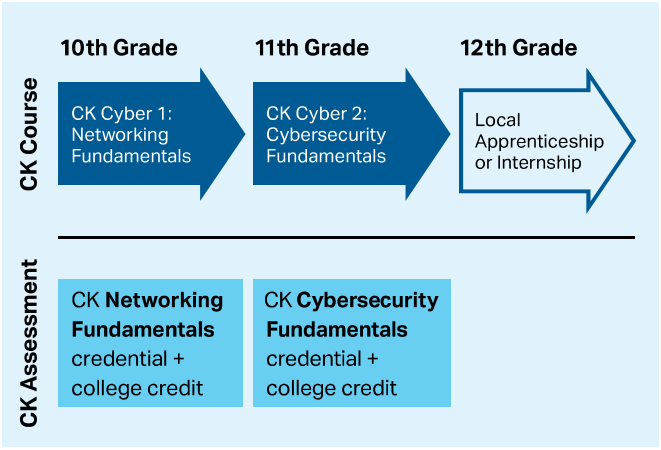
Courses are powered by the AP® features that educators value: robust **teacher training**, dedicated educator communities, **free** student resources, high-quality assessments, and the broadest national network of college credit policies.

Cybersecurity Pathway

Cybersecurity is an in-demand, high-growth field with entry-level jobs that pay well and don't require a four-year degree. There are currently more than 500,000 open cybersecurity jobs across the country[1], but less than 2% of high school students have access to cybersecurity pathways[2]. Career Kickstart is piloting the cybersecurity pathway with schools in 2024-25 and 2025-26 in preparation for national launch in 2026-27.

Cybersecurity is the first pathway Career Kickstart will launch. We are exploring additional pathways in other high-growth sectors like health sciences and business.

CK STUDENT EXPERIENCE



Career Kickstart courses prepare students through:

Applied learning: Students will build the skills needed to solve problems in the job sector by doing activities rooted in authentic work-based scenarios.

Career connections: Students learn about the career field and the skills and interests required to be successful.

Supportive instruction: Course content is designed with appropriate scaffolding and contexts to ensure students from all backgrounds can meaningfully engage and succeed.

Career Kickstart Cybersecurity pathway resources:

- **Course frameworks** outline the essential knowledge and learning objectives for each course, include pacing suggestions, and emphasize both the technical and professional skills needed in the industry.
- **Sample lesson plans** aligned to the course frameworks, provide applied and career-connected pedagogy.
- **5-day summer training** on course content, lesson development and delivery.
- Monthly **professional learning** opportunities during the school year.
- Online **teacher community** to share best practices.
- **Career Kickstart Classroom** (modeled after AP Classroom), will include exam support for teachers and students.
- Exam that qualifies for **college credit.**

Apply by November 15, 2024, to be a Career Kickstart Pilot Teacher!
careerkickstart.org

1. Cyberseek.org
2. cybersupply.org

Career Kickstart Cybersecurity Pilot Overview

In the 2025-26 school year, Career Kickstart will pilot the Cybersecurity pathway with 500 high schools to test the course frameworks for **Career Kickstart Cybersecurity 1: Networking Fundamentals** and **Career Kickstart Cybersecurity 2: Cybersecurity Fundamentals.**

Participating teachers will use the course frameworks and administer the course assessments.

We are piloting in **AL, AZ, AR, CA, CO, FL, GA, IL, ID, IN, KY, MD, MI, MS, NC, ND, NV, NY, OH, PA, RI, SC, TN, TX,** *and* **VA.** *If you'd like to be a pilot teacher and you're not in one of these states, please email* **careerkickstartpilots@collegeboard.org.**

Pilot Timeline

June 2024: School application opens

November 15, 2024: Deadline for applications to be received

December 2024: Invitations to participate sent to all accepted schools

February 2025: Deadline for schools to confirm participation

Spring 2025: Schools recruit students to Career Kickstart courses for the 2025-26 school year

July 2025: Pilot teachers attend Career Kickstart Summer Institute (CKSI) (multiple dates and locations will be available)

August/September 2025: Pilot teachers launch Career Kickstart course

November 15, 2025: Deadline to register students for Career Kickstart exams*

May 2026: Career Kickstart exam administered and completion of pilot year

**Except for courses that don't start until after Nov 15.*



School Commitments

- Identify a teacher to lead the course during the 2025-26 school year.
- Send the teacher to a 5-day CKSI during July 2025.
  - Registration fee: $900
  - Lodging: College Board will cover cost of lodging for Pilot participants for SY25-26.
- Register students for Career Kickstart exams by the Nov 15 2025, deadline using the AP Registration and Ordering system. Order exams as part of the school's AP Exam order submitted by the AP coordinator.

For more information on Pilot commitments and to apply, visit **Careerkickstart.org**

Questions? Email **careerkickstartpilots@collegeboard.org**

Why is College Board launching Career Kickstart?

Students demand more career exploration in high school to help them turn a passion into a profession, but many lack access to quality career-focused programs that lead to in-demand jobs. College Board launched Career Kickstart to provide a pathway for these students.

With a proven record of designing high-quality educational opportunities for scale, College Board is building Career Kickstart in partnership with industry and higher education to assure national access to outstanding career education that today is only available in some communities.

College Board's aim is to clear a path for all students to own their future, saving students time and money on their educational journey. Career Kickstart is an important new program to meet that mission.

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Career Kickstart™
Powered by AP®



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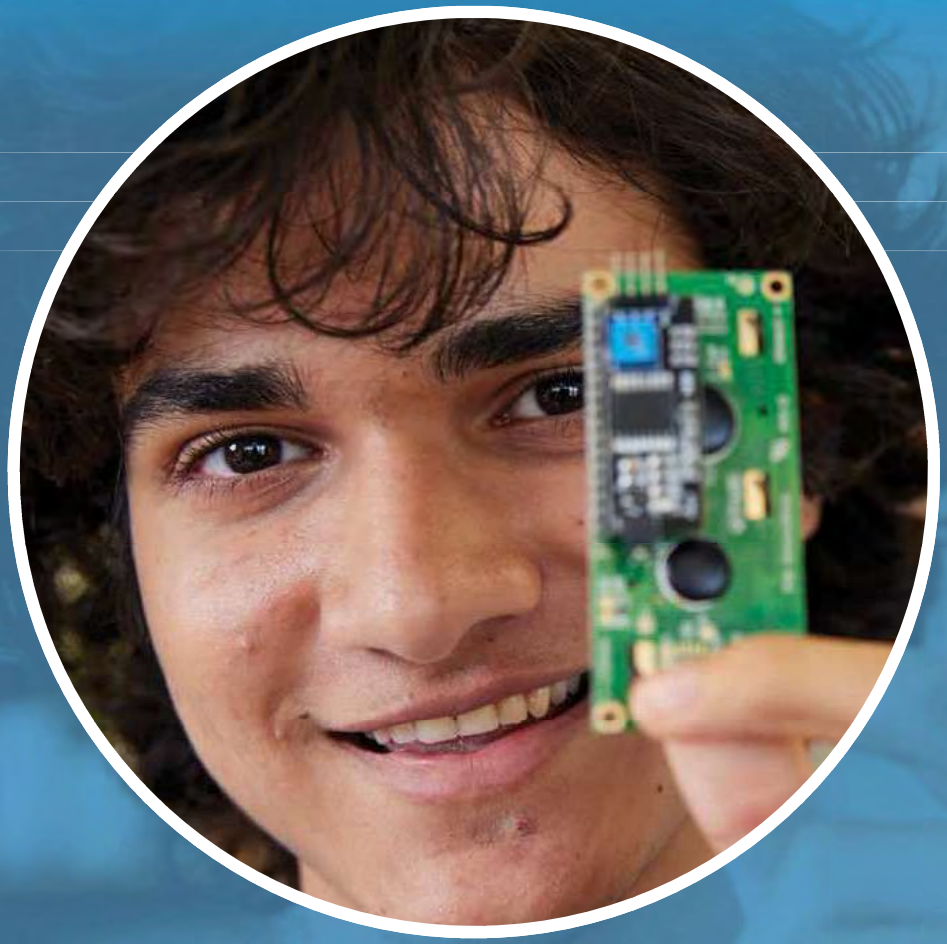
Career Kickstart™
Powered by AP®

Cybersecurity Pilot

INSTRUCTIONAL OVERVIEW



Clearing a path for all students to own their future through career preparation.

Apply to be in our Pilot by November 15 2024, visit **careerkickstart.org**

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Cybersecurity Fundamentals

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Career Kickstart Cybersecurity opens countless doors for CTE students by offering real-life experiences in the field of cybersecurity. It prepares students for the workforce and equips them for both two- and four-year colleges. This program is particularly beneficial for hands-on learners, providing inclusive opportunities for all students to engage with the subject.

— Beth Cerrone,
Cybersecurity K-12 Educator,
St. Vrain Valley Schools,
Career Kickstart Advisory Board Member

Career Kickstart Program

Career Kickstart™ is a new career-focused program that will lead to credentials and college credit for all students who want to prepare for a career, whether they are heading to two- or four-year colleges, technical schools, or the workforce. With a focus on high-demand fields like cybersecurity, Career Kickstart will bring the best of Advanced Placement to courses designed for career and technical education (CTE).

Career Kickstart courses are powered by the AP® features that educators value: robust professional learning for teachers, dedicated educator communities, free student resources, high-quality assessments, and the broadest national network of college credit policies.

Career Kickstart offers two-course pathways that equip students for in-demand careers. Both industry experts and college faculty participate in defining the scope and sequence of the courses. Courses emphasize hands-on experience, teach professional and technical skills, and align to career and technical education (CTE) standards and credentials valued by industry.

Cybersecurity is the first pathway Career Kickstart will launch. We are exploring additional pathways in other high- growth sectors like health sciences and business.



Why College Board Is Developing Career Kickstart

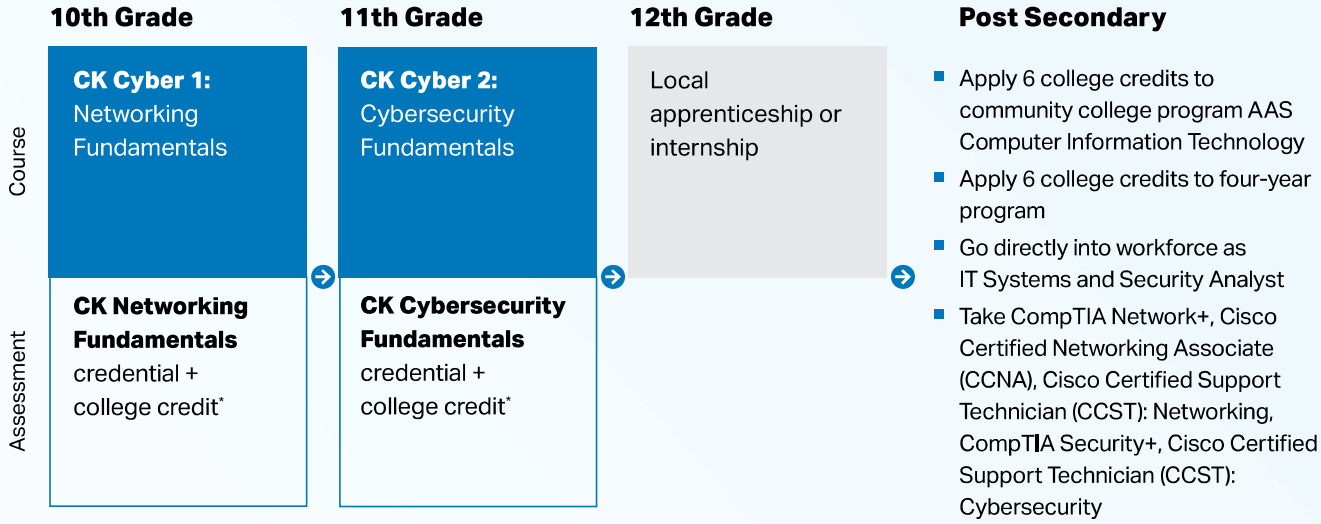
College Board reaches more than 7 million students a year, helping them navigate the path from high school to college and career. Our not-for-profit membership organization was founded more than 120 years ago. We pioneered programs like the SAT® and AP® to expand opportunities for students and help them develop the skills they need. Our BigFuture® program helps students plan for college, pay for college, and explore careers.

To continue these pioneering efforts, College Board is building Career Kickstart to strengthen and expand CTE education nationwide. Students demand more career exploration in high school to help them turn a passion into a profession, but many lack access to quality career-focused programs that lead to in-demand jobs. College Board launched Career Kickstart to provide a pathway for these students.

With a proven record of designing high-quality educational opportunities at scale, College Board is building Career Kickstart in partnership with industry, higher education, and high school educators to assure national access to outstanding career education that today is only available in some communities.

College Board's aim is to clear a path for all students to own their future, saving students time and money on their educational journey. Career Kickstart is an important new program to meet that mission.

Career Kickstart Student Experience



About the Cybersecurity Pathway

Cybersecurity is a high-growth field with entry-level jobs that pay well and don't require a four-year degree. There are currently more than 500,000 open cybersecurity jobs across the country, but less than 2% of high school students have access to cybersecurity pathways.[1]

The two yearlong courses in the Career Kickstart Cybersecurity Pathway—first **Cybersecurity 1: Networking Fundamentals** and then the **Cybersecurity 2: Cybersecurity Fundamentals** course—are designed to provide students with stackable credentials that they can apply to entry-level jobs and to college, and to help connect them to jobs that provide good salaries in this in-demand, high-growth industry.

After demonstrating competency through Career Kickstart cybersecurity coursework, students have multiple options to continue their career development:

- Go directly into the workforce or secure an apprenticeship.
- Continue progress toward taking common industry certifications including CompTIA Network+, Cisco Certified Networking Associate (CCNA), Cisco Certified Support Technician (CCST): Networking, CompTIA Security+, and Cisco Certified Support Technician (CCST): Cybersecurity.
- Apply college credits to a relevant community college degree or certificate program.
- Apply college credits to a relevant four-year degree.

Several early-career jobs associated with the cybersecurity pathway do not require a college degree and pay median salaries in the range of $62,000 to $137,000, including:[2]

- Cloud Architect
- Cyber Crime Investigator
- Cyber Defense Incident Responder
- Cyber Ops Planner
- System Testing and Evaluation Specialist
- Systems Administrator
- Vulnerability Assessment Analyst

SOURCES

1 Cyberseek.org, "Cybersecurity Supply/Demand Heatmap," accessed May 27, 2024, https://www.cyberseek.org/heatmap.html

2 Cyber.org, "Cyber Career Profiles," accessed May 27, 2024, https://cyber.org/career-exploration/cyber-career-profiles.



CYBERSECURITY 1

About the Networking Fundamentals Course

Description

This is a full-year high school course that covers the fundamentals of networking. It is equivalent to a college-level Introduction to Networking course. The course interweaves essential networking concepts with relevant, hands-on problem-solving activities to maximize students' understanding of network hardware and configuration, the use of protocols to enable reliable and accurate transmission of data between different hosts around the world, and relevant security practices that secure the transmission of data both within and between computer networks.

College Course Equivalent

Career Kickstart Networking Fundamentals is designed to be the equivalent of a 3-credit course taken in the first or second year of a college cybersecurity degree or certificate program. Developed in partnership with higher education faculty, this course meets all of the requirements necessary to earn college credit.

Certification

Career Kickstart Networking Fundamentals is designed to help students develop understanding and skills that will contribute to their ability to pass widely recognized professional cybersecurity certifications such as CompTIA Network+ , Cisco Certified Networking Associate (CCNA), and Cisco Certified Support Technician (CCST): Networking..

As we attempt to better the lives of our students, Cybersecurity is a field that is here to stay and will help provide our students with upward mobility opportunities, create new opportunities for generational wealth, change their families' lives, and help improve their communities.

— **Dr. Diego Tibaquirá,**
Professor at Miami Dade College
Career Kickstart Advisory Board Member

CYBERSECURITY 1

Course at a Glance—
Networking Fundamentals

UNIT 1	**Introduction to Cybersecurity and Networking**	▪ Introduction to Cybersecurity ▪ Personal Digital Security ▪ Enterprise Security ▪ Introduction to Computer Systems ▪ Introduction to Command Line ▪ Introduction to Networks ▪ SOHO vs. Enterprise Networks
UNIT 2	**Layers, Protocols, and Addressing**	▪ OSI and TCP/IP Models ▪ Introduction to Protocols and Servers ▪ Cabling ▪ Network Topologies ▪ Physical Addressing ▪ Logical Addressing ▪ IP Configuration
UNIT 3	**Configuring a LAN**	▪ Switching ▪ Switch Security ▪ More on Protocols ▪ LAN Configuration and Troubleshooting
UNIT 4	**Advanced LAN Topics**	▪ IPv4 Addressing ▪ Routing ▪ Subnetting ▪ Wireless Networks ▪ Network Troubleshooting
UNIT 5	**Network Security**	▪ Introduction to Security Controls ▪ Physical and Administrative Controls ▪ Technical Controls: Firewalls ▪ Technical Controls: Network Segmentation ▪ Technical Controls: Network Monitoring ▪ Defense in Depth

CYBERSECURITY 1

Technical Skills

EXPLAIN NETWORKING AND CYBERSECURITY CONCEPTS

1. Describe and explain concepts and processes related to data, computer networking, and cybersecurity.
2. Explain relationships among data, computer networking, and cybersecurity.

DESIGN A SECURE NETWORK

1. Determine appropriate endpoints, network appliances, transmission media and communication protocols to meet network requirements.
2. Determine security controls that address potential vulnerabilities.

CONFIGURE A SECURE NETWORK

1. Connect and configure network components using appropriate media, communication protocols, and commands.
2. est network connectivity, verify network requirements, and troubleshoot network issues.
3. Create technical documentation of network layouts, settings, and configurations.

CYBERSECURITY 1

Professional Skills

COMMUNICATION

Communicate technical information to both technical and nontechnical audiences.

1. Identify the purpose of communication.
2. Synthesize relevant information from multiple sources.
3. Distill, tailor, and contextualize content for a specific audience or setting (e.g., verbal, written, or presentation form).

PROBLEM SOLVING

Use methodology to solve complex problems.

1. Identify/define the problem.
2. Identify and evaluate potential root cause(s).
3. Identify and evaluate potential solutions.
4. Implement and justify a best solution.
5. Evaluate the outcome of the solution and iterate, if necessary.
6. Document and reflect upon the process and outcome.

COLLABORATION

Effectively collaborate with a team to meet a shared goal.

1. Use strategies to build trust and rapport with members of the team.
2. Develop clear, shared team objectives.
3. Define clear roles and responsibilities for members of the team.
4. Use strategies to resolve conflicts and differences of opinions among team members.
5. Follow through on agreed upon deliverables.

CYBERSECURITY 1

Course Pacing Summary by Unit

UNIT	UNIT NAME	MIN TOTAL	MAX TOTAL
1	Introduction to Cybersecurity and Networking	22	30
2	Layers, Protocols, and Addressing	18	31
3	Configuring a LAN	14	21
4	Advanced LAN Topics	21	28
5	Network Security	17	30
	TOTAL	92	140

CYBERSECURITY 1

Networking Fundamentals Materials List

Required

Computers with internet access and an installed network simulator like Cisco Packet Tracer.

Suggested

- Computer hardware exploration (Topic 1.4)
- Basic desktop PCs (for assembly/disassembly)
- Basic PC toolkit (screwdrivers, etc.)
- Desktops with the ability to run virtual machines (e.g., with Virtual Box; could also be done using a cyber range like Cyber.org provides)
- SOHO network setup (Topic 1.6)
- SOHO router
- Ethernet cables
- Computer capable of providing basic network services (e.g., FTP, DHCP, HTTP/HTTPS and website hosting, etc.)
- Hardware examples: Raspberry Pis, decommissioned district IT hardware, desktop PCs, etc.
- Computers that can run packet sniffing software (e.g., Wireshark)
- Cable construction tools (Topic 2.3):
  - Box of 5e and/or 6a bulk cable
  - Cable crimpers
  - RJ-45 connectors
  - Cable connectivity testers
- Basic LAN configuration and troubleshooting materials
- Small business switches (managed)
- Business routers and firewalls
- Wireless access points
- Access to a cyber range or sandbox (e.g., Cyber.org's cyber range)

CYBERSECURITY 2

About the Cybersecurity Fundamentals Course

Description

Career Kickstart Cybersecurity 2: Cybersecurity Fundamentals is a full-year course covering foundational cybersecurity concepts and skills and is equivalent to a collegiate Introduction to Cybersecurity course. Students will explore the current cyber threat landscape to understand the types of adversaries organizations face and the techniques adversaries use to compromise systems and data. Students will learn how vulnerabilities create risk and how organizations implement security controls to manage that risk. Topics in the course include physical, operational, application, and network security; security controls, cryptography, access control, attacks and detection, and response and recovery. Students will research emerging trends in cybersecurity and gain hands-on experience implementing security protocols.

College Course Equivalent

Career Kickstart Cybersecurity Fundamentals is designed to be the equivalent of a 3-credit course taken in the first or second year of a college cybersecurity degree or certificate program. Developed in partnership with higher education faculty, this course meets all of the requirements necessary to earn college credit.

Certification

Career Kickstart Cybersecurity Fundamentals is designed to help students develop understanding and skills that will contribute to their ability to pass widely recognized professional cybersecurity certifications such as CompTIA Security+ and Cisco Certified Support Technician (CCST): Cybersecurity.

CYBERSECURITY 2

Course at a Glance—
Cybersecurity Fundamentals

UNIT 1	**Assessing Risk**	▪ Cybersecurity Fundamentals ▪ Develop a Threat Model ▪ Conduct a Risk Assessment
UNIT 2	**Configuring Security Controls**	▪ Defense in Depth ▪ Physical, Administrative, and Operational Controls ▪ Technical Controls: Network Security ▪ Technical Controls: Computer Security ▪ Technical Controls: Access Control
UNIT 3	**Encrypting Data**	▪ Technical Controls: File Security ▪ Symmetric Cryptography ▪ Asymmetric Cryptography ▪ Digital Signatures and Public Key Infrastructure (PKI)
UNIT 4	**Detecting Cyberattacks**	▪ Attack Detection ▪ Attack Methodology ▪ Password Attacks ▪ Application Attacks ▪ Network Attacks
UNIT 5	**Responding to Cyberattacks**	▪ Investigation and Analysis ▪ Containment and Eradication ▪ Recovery

CYBERSECURITY 2

Technical Skills

EXPLAIN CYBERSECURITY CONCEPTS AND PROCESSES

1. Describe concepts and processes related to cybersecurity.
2. Explain concepts and processes related to cybersecurity.

HARDEN A NETWORK

1. Evaluate mitigation strategies to detect and address vulnerabilities.
2. mplement controls to strengthen the security of a computer.

INVESTIGATE A CYBERATTACK

1. Examine evidence related to a cyberattack.

CYBERSECURITY 2

Professional Skills

COMMUNICATION

Communicate technical information to both technical and nontechnical audiences.

1. Identify the purpose of communication.
2. Synthesize relevant information from multiple sources.
3. Distill, tailor, and contextualize content for a specific audience or setting (e.g., verbal, written, or presentation form).

PROBLEM SOLVING

Use methodology to solve complex problems.

Identify/define the problem.

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2. Develop clear, shared team objectives.
3. Define clear roles and responsibilities for members of the team.
4. Use strategies to resolve conflicts and differences of opinions among team members.
5. Follow through on agreed upon deliverables.

CYBERSECURITY 2

Course Pacing Summary by Unit

UNIT	UNIT NAME	MIN TOTAL	MAX TOTAL
1	Assessing Risk	21	23
2	Configuring Security Controls	34	36
3	Encrypting Data	34	36
4	Detecting Cyberattacks	13	15
5	Responding to Cyberattacks	13	15
	TOTAL	115	125

Materials

Cybersecurity 2 students just need computers with access to the internet.

Teacher Resources

Lesson Plans

In addition to the course framework, sequencing, and pacing, pilot teachers will have access to approximately two Career Kickstart–provided lesson plans per unit, including any digital resources associated with each plan (e.g., presentation slides, teacher notes, student handouts, etc.).

CYBERSECURITY 1
Sample Lessons

UNIT 1

Paper Messages



Use double-sided origami paper as a physical representation of the on/off states of bits to prompt students to demonstrate how information is transmitted digitally. Use the strengths and limitations of this representation to motivate the need for protocols and multiple bits in a row to represent and transmit data.

UNIT 1

Binary Number Cards



Students use printable base-10 (decimal) and base-2 (binary) cards to physically model a number's place value. This activity develops students' conceptual understanding of number systems and provides the basis for teaching base-16 (hexadecimal) in the next unit.

UNIT 2

Cable Construction



Students build their own ethernet cables to deepen their understanding that all data sent in a network eventually run through a physical cable. Students learn that the strengths and drawbacks of cables are related to the physical properties of the transmission medium.

UNIT 3

CS Disconnected



There's trouble in the computer lab! Using Cisco Packet Tracer, students must exercise their troubleshooting skills to identify and fix multiple connectivity issues in the lab.

For SY2025-26, Career Kickstart looks to partner with curriculum providers to build out even more high-quality instructional resources for teachers to use in the classroom..

CYBERSECURITY 2
Sample Lessons

UNIT 1

Vulnerability Testing



In a safe virtualized environment, students probe a file server for vulnerabilities using automated tools, document their findings, and present a vulnerability report suggesting mitigations for the vulnerabilities they've detected.

UNIT 3

Secure Communication



Using open-source tools, students generate asymmetric key pairs and practice using encryption and digital signature protocols to securely communicate with a classmate. Through sending and receiving messages, students gain an understanding of how encryption works to protect the contents of a message, verify the integrity of a message, and verify the source of a message.

UNIT 5

Cyber Incident Analysis



In this lesson, students role-play as cyber incident responders investigating a cybersecurity incident. Students work in teams to analyze evidence from a cybersecurity incident and determine who was responsible, how they carried out the cyberattack, and what their motivations were. Student teams practice communication by presenting their analyses to the class.

Summer Training and Professional Learning

Pilot teachers will engage in a required weeklong Summer Institute. There will be multiple dates and locations to ensure everyone can attend. This institute will prepare teachers for Day 1 of their Career Kickstart program, so they'll feel confident delivering Career Kickstart in a way that emphasizes real-world, job-related applications; problem-solving; and the development of students' technical and professional skills. Teachers will also leave the institute as part of a larger community of Career Kickstart cybersecurity educators, able to collaborate with one another throughout the year.

A high-level overview of a teacher's journey through the Summer Institute:

DAY 1 **Grounding Our Work**	**Develop** your understanding of the Career Kickstart program and your role as a pilot teacher.
DAY 2 **Building Foundations**	**Deep dive** into the course guide, sample lesson plans, and Career Kickstart pilot assessment. **Develop** skills for coaching students' professional skills.
DAY 3–4 **Building Engaging Lessons**	**Build** our engaging instructional practice: lesson planning, scaffolding strategies, and lesson delivery. **Incorporate** professional skills and career-oriented learning opportunities.
DAY 5 **Putting Theory into Practice**	**Create and share** new lesson plans to bring the course to life. **Collaborate** with others and begin planning your year.

In addition to summer training, there will be online professional learning opportunities throughout the year.

Online Teacher Community

During Career Kickstart Summer Institute, teachers will leave with at least one lesson per topic authored by the Career Kickstart pilot teacher community in the online teacher community (OTC). The OTC is a place for teachers to both engage in discussions and share resources with the Career Kickstart Cybersecurity pilot teacher community.

In the future, Career Kickstart will look to develop something similar to AP Classroom, which will house additional student and teacher resources for Career Kickstart courses.





Assessment Overview

Cybersecurity 1: Networking Fundamentals and *Cybersecurity 2: Cybersecurity Fundamentals* will both include an exam that measures the learning objectives and skills outlined in the course frameworks. Students will receive a score for their performance on the Career Kickstart Cybersecurity Pathway exams. Just like AP, that score will range from 1–5. College Board is actively working with community colleges, four-year institutions, and technical schools to expand credit policies and ensure that Career Kickstart Cybersecurity Pathway courses set a strong foundation for student success.

More information about exam design and administration will be available by early 2025.

Cybersecurity is essential as it touches every aspect of our digital, societal, economic, political, and physical lives. It protects systems, networks, and data ensuring confidentiality, integrity, and availability of information. By securing these areas, we maintain the safety, trust, and integrity of our interconnected world.

Career Kickstart Cybersecurity offers students the foundational knowledge and a head start for a wide range of in-demand career opportunities in the cybersecurity field, a competitive edge through industry-recognized credentials, and college credit opportunities.

— **Carol Kim,**
Executive Director, IBM
Career Kickstart Advisory Board Member

Attachment 2

AP Capstone

CollegeBoard AP®

Build Students' College and Career Readiness Skills with AP Capstone



About AP Capstone

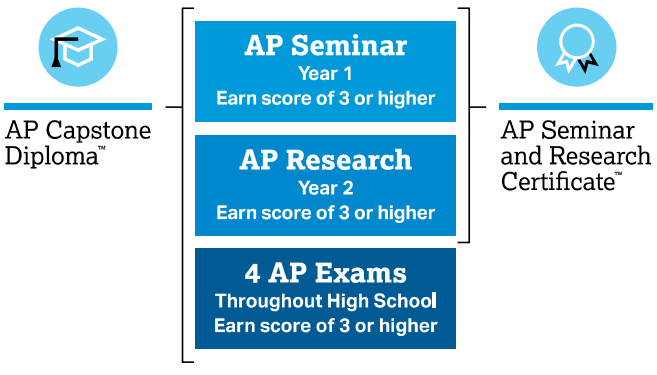
The AP Capstone Diploma™ Program introduces students to solving real-world problems through academic research, critical thinking, and collaboration.

Offered in more than 2,000 high schools globally, AP Capstone™ provides a unique opportunity for students to explore their interests in a college-level course. The program prepares a diverse set of learners with the critical thinking skills needed for college-level work and career—plus the opportunity to earn awards, college credit, and to stand out in the college application process.

AP Capstone Awards

The **AP Capstone Diploma** is awarded to students who earn scores of 3 or higher on AP Seminar, AP Research, and on four additional AP® Exams.

The **AP Seminar and Research Certificate**™ is awarded to students who earn scores of 3 or higher on AP Seminar and AP Research Exams only.



About the Courses

Students take two yearlong AP courses: **AP Seminar** and **AP Research**. School or district leaders must apply to offer these courses.

AP Seminar

Students consider complex issues from multiple perspectives, evaluate sources for credibility and bias, and make evidence-based recommendations in teams and individually. Students often take AP Seminar in 10th grade to build foundational skills for future AP courses.

The AP Seminar Exam includes multimedia presentations, written essays, and a written end-of-course exam. AP Seminar is a prerequisite for AP Research.

AP Research

Students conduct an academic research project on a topic of personal interest. Research projects include a literature review, an appropriate research method, data collection, analysis, and discussion.

The AP Research Exam includes an academic paper, presentation, and oral defense. There is no end-of-course exam for AP Research.

To learn more and apply, visit **collegeboard.org/apcapstone**.

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CollegeBoard AP

Three Steps to Build Your AP Capstone Diploma Program



1 Plan for the Course Sequence

The AP Capstone Diploma™ Program comprises two, yearlong project-based courses: **AP Seminar** and **AP Research**. AP Seminar is an introductory AP® class for grades 10 or 11, and serves as a prerequisite for AP Research, which is typically offered in grades 11 or 12.

These courses can be assigned to a variety of academic departments, allowing flexibility for any educator to become an AP Seminar or AP Research teacher. Teachers in each course typically have English/language arts, science, or social science certifications. There is no obligation for AP Seminar teachers to also teach AP Research.

For more information about resourcing your AP Capstone™ program, utilize the **AP Capstone Implementation Guide**.

2 Apply to Participate

School or district leaders must complete a free, online application and be approved to join the AP Capstone Diploma Program. Once approved to participate in the program, schools are eligible to offer AP Seminar and AP Research courses. Applications must be submitted during the academic year prior to implementation and are reviewed on a rolling basis.

Apply now to participate at **collegeboard.org/apcapstone**.

3 Register Teachers for Training

New AP Seminar and AP Research teachers at schools approved to offer these courses must complete summer professional learning prior to teaching their course.

AP Capstone training focuses on interdisciplinary learning and project-based approaches. It includes:

- A 5-day workshop led by a trained consultant
- Access to additional online professional learning updated annually
- Training in a virtual or in-person setting, hosted at select AP Summer Institutes

Private workshops are also available for districts with a large number of AP Seminar or AP Research teachers requiring training.

AP Capstone Scholarships are awarded to eligible teachers at schools where at least 50% of the student population qualify for free or reduced-price lunch. The scholarship covers the cost of the professional learning tuition.

Visit the **AP Capstone Professional Learning** page for scholarship application information and for approved schools to register for summer training. Registration launches annually in February.

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CollegeBoard AP®

Explore Your Passion with **AP** Capstone™

THE AP CAPSTONE DIPLOMA PROGRAM LETS YOU:

- **Study topics of your own choosing**, in depth.
- **Master key skills** you'll use in college and career.
- **Stand out** in your college applications and interviews.



What Is the AP Capstone Diploma Program?

AP Capstone™ is a diploma program based on two AP courses: **AP Seminar** and **AP Research**. These yearlong courses focus on developing the critical thinking, research, collaboration, time management, and presentation skills you need for college-level work.

AP Seminar

In this course, you'll learn to consider an issue from multiple perspectives, identify credible sources, evaluate strengths and weaknesses of arguments, and make logical, evidence-based recommendations. You'll investigate a variety of topics through various viewpoints of your choice.

During the course, you'll complete a team project and an individual paper and presentation, as well as take a written end-of-course exam. These components contribute to the overall AP Seminar score.

AP Seminar is a prerequisite for AP Research.

AP Research

In AP Research, you'll explore various research methods and complete an independent research project. Your project can build on a topic, problem, or issue you covered in AP Seminar or on a brand new topic of your own choosing.

At the end of the project, you'll submit your academic paper and present and defend your research findings. These components contribute to the overall AP Research score. There is no end-of-course exam.

Here are some topics that students have chosen to investigate in **AP Seminar**:

- Effect of texting on grammar skills
- Food waste solutions
- Future of the automotive industry
- Importance of voting age and civic participation of teens
- Mathematics behind extreme sports
- Genetically modified organisms
- Role of art in education
- Wealth inequality

Visit the AP Seminar student home page at **apstudent.org/seminar**

Here are some topics that students have chosen to investigate in **AP Research**:

- 3-D printed prosthetics for amputees
- Algorithm of K-POP music
- Effects of sleep deprivation on academic achievement in teens
- Learning chemistry through musical chords
- Environmental injustice in subsidized housing
- Effect of popular opinion on the implementation of Supreme Court decisions

Visit the AP Research student home page at **apstudent.org/research**

How It Works

If you earn scores of 3 or higher in AP Seminar and AP Research and on four additional AP Exams of your choice, you'll receive the **AP Capstone Diploma™**.

If you earn scores of 3 or higher in AP Seminar and AP Research, you'll receive the **AP Seminar and Research Certificate™**.



What AP Capstone Alumni Say

"Just do it. … Not a day goes by where I don't use a skill I learned in the course."

—REAGAN, THE UNIVERSITY OF OKLAHOMA

"AP Capstone helped me stand out from other applicants."

—ELIZABETH, INDIANA UNIVERSITY BLOOMINGTON

"My experience in AP Capstone gave me exposure to a field I couldn't really access in the normal school curriculum."

—KAELIN, THE UNIVERSITY OF TEXAS–AUSTIN

"AP Capstone helped me work independently, think critically about research and the research process, and organize myself so I can present to other people."

—MICHAEL, STANFORD UNIVERSITY

"AP Capstone has given me skills that helped me easily adjust to the college environment."

—DESTINI, TEMPLE UNIVERSITY

Learn more about AP Capstone at **collegeboard.org/apcapstone**.

Stand Out in College Admission with AP Capstone

AP Capstone candidates stand out:

- On college applications and essays because they demonstrate critical thinking, communication, and research skills associated with AP Capstone.
- In college interviews because of the confidence, expertise, and passion they show when they talk about their unique academic projects.
- To college admission officers, who recognize that AP Capstone students know how to build evidence-based arguments, apply research methods, work in teams, deliver professional presentations, and complete long-term academic projects.

These are just some of the colleges and universities that offer credit and/or placement policies for AP Seminar and AP Research:

- Brigham Young University
- California Institute of Technology
- California State University
- Colorado State University
- Fashion Institute of Technology
- Marquette University
- Massachusetts Institute of Technology
- McGill University
- Michigan State University
- The Ohio State University
- Purdue University
- University at Albany, SUNY
- University of Florida
- University of Illinois
- The University of Texas
- University of Wisconsin
- Washington State University
- West Virginia University

A complete list can be found at **collegeboard.org/apcapstonehed.**

What College Administrators Say

"AP Capstone helps students develop key skills that they will use over and over in college: conducting research and communicating their results."

—STU SCHMILL, DEAN OF ADMISSIONS AND STUDENT FINANCIAL SERVICES, MASSACHUSETTS INSTITUTE OF TECHNOLOGY

"AP Capstone not only equips students with critical thinking and communication skills they will need in college, but also immerses them in independent research within a collaborative environment."

—PHILIP BALLINGER, ASSOCIATE VICE PROVOST FOR ENROLLMENT AND UNDERGRADUATE ADMISSIONS, UNIVERSITY OF WASHINGTON

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AP Capstone™

Implementation Guide

2024-25

FOR THESE COURSES:

- AP® Seminar (including English 10: AP Seminar)
- AP Research



AP Equity and Access Policy

College Board strongly encourages educators to make equitable access a guiding principle for their AP® programs by giving all willing and academically prepared students the opportunity to participate in AP. We encourage the elimination of barriers that restrict access to AP for students from ethnic, racial, and socioeconomic groups that have been traditionally underrepresented. Schools should make every effort to ensure that their AP classes reflect the diversity of their student population. College Board also believes that all students should have access to academically challenging coursework before they enroll in AP classes, which can prepare them for AP success. It's only through a commitment to equitable preparation and access that true equity and excellence can be achieved.

Contact Us

AP® Services for Educators
877-274-6474 *(toll free in the United States and Canada)*

212-632-1781

Contact Form: **cb.org/apeducatorcontact**

AP Services for Students
888-225-5427 *(toll free in the United States and Canada)*

212-632-1780

Contact Form: **cb.org/apstudentcontact**

AP Services (mailing)
P.O. Box 6671
Princeton, NJ 08541-6671

610-290-8979 (fax)

For overnight and/or courier mail:
AP Services
1425 Lower Ferry Road
Ewing, NJ 08618-1414

College Board Services for Students with Disabilities
P.O. Box 6226
Princeton, NJ 08541-6226

844-255-7728 *(for school staff in the United States and Canada)*

212-713-8333 *(for all students and parents; and for school staff outside the United States and Canada)*

Email: ssd@info.collegeboard.org

Send eligibility-related mail such as SSD coordinator forms or applications for accommodations to:
College Board SSD
P.O. Box 7504
London, KY 40742-7504

866-360-0114 (fax)

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AP Capstone Diploma Program Overview

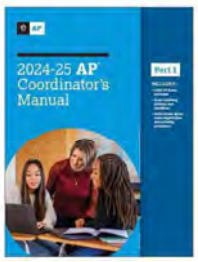
Where to Find Information

The publications below provide details about the AP Capstone Diploma™ program. Also see the AP Capstone™ section of AP Central® at **collegeboard.org/apcapstone** and the resources listed on page 27.



AP Seminar– and AP Research–specific policies in effect for the 2024-25 school year are posted on **collegeboard.org/apcapstonepolicies**.

Policies should be reviewed each year as they evolve. For example, policies regarding the usage of generative AI and teacher requirements may change from year to year as more information becomes available.



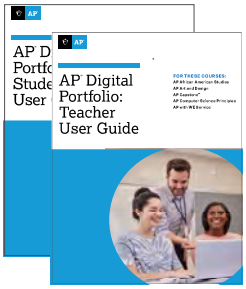
Part 1 and **Part 2** of the *2024-25 AP® Coordinator's Manual* contain important information about the AP coordinator's role in the AP Capstone program, including directions on how to order and administer AP Capstone exams. **Part 1** will be available in August 2024, and **Part 2** will be available in early 2025.



The ***AP Seminar Course and Exam Description*** provides the pedagogical framework, curricular requirements, instructional approaches, and assessment details for the AP Seminar course.



The ***AP Research Course and Exam Description*** provides the pedagogical framework, curricular requirements, instructional approaches, and assessment details for the AP Research course.



The ***AP Digital Portfolio: Student User Guide*** and the ***AP Digital Portfolio: Teacher User Guide*** help students and teachers navigate the digital portfolio and the required submission and scoring of student work.

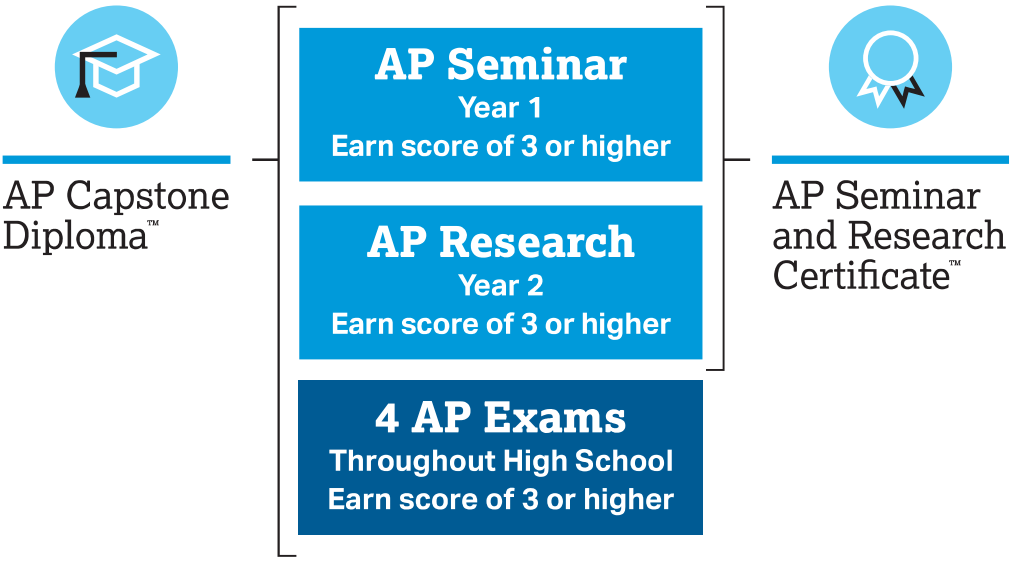
How AP Capstone Works

The AP Capstone Diploma program is a college-level program based on two courses—AP Seminar and AP Research—that complement and enhance discipline-specific AP courses.

The program gives students a chance to practice core academic skills that are increasingly valued by colleges. The ability to think independently, write effectively, research, collaborate, and learn across disciplines is essential for success in college, career, and beyond.

Students who earn scores of 3 or higher in AP Seminar and AP Research and on 4 additional AP Exams of their choosing receive the AP Capstone Diploma. This signifies their outstanding academic achievement and attainment of college-level academic and research skills. Students who earn scores of 3 or higher in both AP Seminar and AP Research but not on 4 additional AP Exams receive the AP Seminar and Research Certificate™.

AP Capstone was developed in response to feedback from higher education and is easily implemented and flexible. It has the potential to differentiate and transform high schools and their students by elevating the learning environment through a challenging, college-level program with high standards of assessment.



Implementation

How to Become an AP Capstone School

Any school can participate in the AP Capstone Diploma Program; as of the 2024-25 school year, no application or sign-up form is required. To become an AP Capstone school and offer AP Seminar and AP Research, schools must ensure that their teachers complete the required AP Capstone Summer Institute prior to teaching either course.

Costs and Resourcing Considerations

There are no annual administrative fees charged by College Board. Administrators should consider the costs and resources outlined below when planning to implement AP Capstone courses.

AP CAPSTONE SUMMER INSTITUTE FEE

The cost for the 2025 AP Capstone Summer Institute is $1,075 per participant. The fee is updated annually.

This fee includes tuition and electronic materials for the AP Summer Institute, as well as access to the online scoring training. It does not include travel, lodging, meal expenses, and incidental costs.

All new AP Seminar and AP Research instructors are required to attend an AP Capstone Summer Institute before teaching either course for the first time. A school can't offer an AP Course Audit–authorized AP Seminar or AP Research course without a trained teacher. This training is offered by select AP Summer Institutes throughout the summer. School leaders aren't required to attend this AP Summer Institute but may use this opportunity to deepen their understanding of the program and may make a special request to attend. Teachers complete training once before their first year teaching the course—this isn't an annual requirement.

A limited number of fee waivers for teachers from eligible schools are available through an application process available on our **AP Summer Institute Tuition Fee Waivers page**.

Note: The AP Summer Institute fee doesn't include travel, lodging, some meals, credit card processing fees for registration, or incidentals. Additional training may be required at the school's expense if assessment scoring performance doesn't meet College Board standards. Fees are subject to change annually.

In addition, all AP Seminar and AP Research teachers must complete online assessment scoring training during the school year—this is an annual requirement for all AP Capstone teachers that is separate from the AP Summer Institute for new teachers.

See **collegeboard.org/apcapstonepl** for more information.

EXAM FEES

The 2024-25 exam fee for AP Seminar and AP Research is $147 per exam, and schools retain a $9 rebate per exam. An exam order for AP Seminar and/or AP Research must be submitted for all students included in the exam roster in AP Registration and Ordering. College Board provides a $37 fee reduction per AP Exam for students who are eligible for the College Board fee reduction. Schools are expected to forgo their $9 rebate for these students. Many states use federal and state funding to further reduce the exam fee for these students. The AP Program will update state subsidy information posted on AP Central (**cb.org/apexamfeeassistance**) as soon as each state finalizes their 2025 funding plan.

See **Part 1** of the *AP Coordinator's Manual* for detailed information about fees.

RESOURCING YOUR AP CAPSTONE PROGRAM

During the 2024-25 school year, all AP Seminar and AP Research students will receive digital access to EBSCO Academic Search Ultimate and Turnitin via the AP Digital Portfolio at no additional cost.

REQUIREMENTS

Teachers and students need high-speed internet access and technology to conduct research, complete multimedia presentations, and submit team and individual projects. Schools should be sure their technology infrastructure offers the bandwidth to perform these tasks.

Schools and districts should consider the following recommendations even though they're **not** mandatory:

- Compensation and/or release time for teachers to take online scoring training and score students' through-course assessments
- Extra time before or after school, or on weekends, for students to give their multimedia presentations (and to free up class time)
- Staff designated to support students enrolled in the AP Capstone program (e.g., librarian, media specialist, expert adviser)
- Extra time during faculty meetings to explain the AP Capstone program and align curriculum with AP courses
- Professional learning time to allow AP Capstone teachers to meet as a professional learning community (PLC)
- Professional learning funding for AP Capstone teachers to attend AP Annual Conference sessions
- Release time for teachers to be AP readers
- Funding to reduce the AP Exam fee for AP Capstone students
- Meetings with parents to talk about the AP Capstone program
- Classroom furniture that facilitates group instruction and student collaboration
- Access to databases and online academic resources through the school library or media center
- One-to-one student access to computers, laptops, or tablets during AP Seminar and AP Research class time

Recruiting Students

Students who are motivated and prepared for college-level coursework are best suited for the AP Capstone Diploma program, but the program also benefits those students who show potential for AP coursework but haven't yet enrolled in AP courses. Students should demonstrate curiosity about real-world issues, a willingness to take intellectual risks, and a dedication to acquiring the skills that colleges and universities value—critical inquiry, analysis, and research. In short, AP Capstone students have an interest in becoming curious, independent, and collaborative scholars.

RECRUITMENT TOOLS

- AP Capstone on AP Central: **collegeboard.org/apcapstone**
- Elevate English 10 with AP Seminar website: **collegeboard.org/apseminarela**
- AP Students website: **apstudents.collegeboard.org/ap-capstone-diploma-program**
- AP Capstone student brochure: **secure-media.collegeboard.org/digitalServices/pdf/ap/ap-capstone/ap-capstone-student-brochure.pdf**
- AP Potential™: **appotential.collegeboard.org**
- Broadening Access to AP Toolkit: **cb.org/accesstoolkit**

RECRUITMENT STRATEGIES

- Present AP Capstone at a Parent Night as an extension of or introduction to AP coursework.
- Provide AP Capstone brochures during an open house.
- Meet with rising grade 10 or grade 11 students before course selection.
- Discuss the benefits and challenges of AP Capstone in face-to-face meetings with potential candidates and parents.
- Develop teacher recommendations tailored to AP Capstone characteristics and requirements.
- Plan classroom visits by school leaders, counselors, and current AP Capstone students to talk about the benefits of the program, how the program works, and how it fits into students' schedules.
- Recognize student participation and achievement through academic letters and honors distinctions.
- Direct students and parents to the AP Students website: **apstudents.collegeboard.org/ap-capstone-diploma-program**

RECRUITMENT OF STUDENTS WHO ARE NEW TO AP

AP Capstone can propel a diversity of students to pursue their own interests/passions. Students develop the tools to meaningfully and thoughtfully weigh in on issues that matter to them—whether local, regional, national, or global in nature. Students choose their own research topic for their theses. For some schools, AP Seminar may be used as a way to introduce students to the rigor of Advanced Placement® while providing the foundational skills that will complement other AP courses.

Scheduling AP Capstone Courses

AP Seminar and AP Research are flexible and may be offered as a sequence in grades 10 and 11, grades 11 and 12, or grades 10 and 12. Schools may offer a combination of sequences and align AP Capstone courses with an existing senior project requirement or existing AP courses.

Currently, many schools are offering AP Seminar in their English department to satisfy a graduation requirement. Learn more about this approach on **collegeboard.org/apseminarela**. Although many schools are positioning AP Seminar for English 10, this course can be offered through any academic department and in grades 10, 11, or 12. AP Research follows AP Seminar. AP Research can be offered in grades 11 and 12 and can fit into any department.

It's not recommended that AP Seminar be offered in grade 9. However, students in grade 12 can be encouraged to take AP Seminar if they understand that they won't meet the eligibility requirements for the AP Capstone Diploma or the AP Seminar and Research Certificate.

AP Capstone schools can only offer AP Seminar in their first year of implementation. After the first year, schools can then introduce AP Research when ready.

Note: AP Seminar is a prerequisite for AP Research. See the **Prerequisite** policy on **AP Central** for details.

GRADE-LEVEL SEQUENCE	GRADE 10/11	GRADE 11/12	GRADE 10/12
Pros	▪ Builds college-level critical skills early in the students' high school career. ▪ Increases participation and performance in AP courses. ▪ Enables grade 12 students to mentor students in AP Seminar and AP Research. ▪ Lets students complete a research project before submitting college applications and participating in college interviews.	▪ Student maturity provides a larger pool of students able to participate in AP Seminar. ▪ Students have a broader foundation of skills and content knowledge before beginning college-level work. ▪ Schools can structure a culminating experience for graduating seniors.	▪ Enables students to acquire college-level skills early and apply those skills in a culminating research project. ▪ Enables development of college-level critical skills early in the students' high school career. ▪ Increases participation and performance in AP courses. ▪ Enables schools to structure a culminating experience for graduating seniors.

GRADE-LEVEL SEQUENCE	GRADE 10/11	GRADE 11/12	GRADE 10/12
Cons	▪ Adds a major research project to the traditionally busy grade 11.	▪ Students have limited opportunity to retake AP Seminar and AP Research.	▪ Requires that the curriculum bridge the grade 11 gap so AP Research doesn't need to reteach the skills acquired in AP Seminar.

English 10: AP Seminar

OFFERING AP SEMINAR AS AN ENGLISH 10 COURSE

There are a variety of ways to implement AP Seminar. Schools are choosing to offer AP Seminar as an English course for grade 10. This approach introduces students to AP and expands access for students to engage in more relevant coursework with project-based assessments. Integrating AP Seminar into English departments provides the greatest opportunity for students to fit the course within their schedules and meet a graduation requirement.

CONSIDERATIONS TO IMPLEMENT ENGLISH 10: AP SEMINAR

- **Course Categorization**
  AP Seminar can fulfill an English Course Requirement*. AP Seminar students master skills in analyzing a variety of texts, writing explanatory and argumentative essays, conducting research, working in teams, and presenting. These skills align with English 10 standards, offering teachers the flexibility to incorporate local English standards into their instruction. State crosswalks, available upon request, illustrate how AP Seminar corresponds with state ELA standards.

  Teachers can supplement their AP Seminar course to meet English 10 standards by adding literary and rhetorical analysis, as well as narrative writing, into the themes they choose.

  Learn how schools and districts are incorporating AP Seminar as a core course.

  - Teacher Perspectives: Rethinking Your English Sequence with AP Seminar
  - Administrator Insights: Rethinking Your English Sequence with AP Seminar

- **Instructor Credential**
  Certified English instructors in states with an approved English 10 course code for AP Seminar are eligible to teach English 10: AP Seminar.

  Additionally, certified English instructors must complete the required AP Capstone Summer Institute to teach English 10: AP Seminar.

*Schools should contact their state department of education to find out their specific policies regarding English credit.

- **Curricular Resources**
  A variety of curricular resources are available for English curriculum leaders and staff interested in understanding strategies and instructional approaches of English 10: AP Seminar.

  - **Instructional Guide**: Strategies to incorporate English 10 skills such as literary analysis and creative writing into the course.
  - **Sample Syllabus A**: Integrates full literary texts (*Night*, *To Kill a Mockingbird*, and *Macbeth*) into the course and suggests a final unit to address narrative writing standards.
  - **Sample Syllabus B**: Weaves literary fiction and nonfiction texts throughout the course.
  - **Sample Syllabus C**: Connects longer works read over the summer to shorter texts (including artistic works) based on thematic links.

  Learn more about this approach on AP Central: **collegeboard.org/apseminarela**

- **Course Sequence**
  It's recommended to use AP Seminar to fulfill English 10 requirements in approved states. However, depending on the state policy, schools and districts have the flexibility to offer AP Seminar as a core English course in grades 11 and/or 12.

  A typical pathway to offer English 10: AP Seminar is to all sophomores, as shown in the table below. To view the entirety of pathways, see the **English Sequence Options Table**.

GRADE 9	GRADE 10	GRADE 11	GRADE 12
English 9 or Pre-AP® English 1	**English 10: AP Seminar**	English 11	English 12
			AP English Language
			AP English Literature
		AP English Language	English 12
			AP English Literature
		AP English Literature	English 12
			AP English Language

- **Eligible Students**
  Offering English 10: AP Seminar to students is a local decision due to the flexible implementation options of the course. For some schools, AP Seminar can fulfill an English 10 option, or, in some, it can be the gradewide English 10 course. We recommend schools have the structures in place to support a diversity of learners before requiring all grade 10 students to take this AP course.

  Learn more about this on AP Central: **collegeboard.org/apseminarela**

Making AP Capstone Work with Your School Schedule

AP Seminar and AP Research are full-year courses enabling students to focus on college-level critical skills (AP Seminar) and college-level research skills (AP Research).

AP Seminar may be offered in a traditional schedule or an A/B block schedule. The performance task assessments usually begin toward the end of the first or the beginning of the second semester. The second performance task can't be started prior to January, when the stimulus materials for that task are published by College Board. Final student work must be uploaded to the AP Digital Portfolio by April 30, 2025, at 11:59 p.m. ET. Teachers must review final student submissions, score student presentations, and affirm authenticity in the digital portfolio by May 10, 2025, at 11:59 p.m. ET. Recommended completion dates for both performance tasks are February 28 and April 15, respectively. The assessment schedule limits the ability to offer AP Seminar on a 4x4 block schedule. AP Seminar requirements can't be completed in a fall block-scheduled course. Although the 4x4 block schedule doesn't preclude offering the AP Capstone courses, it does require schedule variations.

AP Research may be offered in a traditional schedule or an A/B block schedule. The course can also be offered in a 4x4 block schedule, though this isn't recommended. Offering AP Research on this schedule requires support and accountability measures to make sure students are supervised throughout the research process and that teachers have ample time to teach the required skills and score student presentations and oral defenses. Schools that offer AP Research in the fall semester need to design student supports to monitor student–adviser relationships and to ensure that research projects are completed on time. AP Research teachers need time to score student presentations before the deadline unless students are required to complete the research project and presentation before the end of the first semester. However, this limits the time available to students to complete the rigorous research project while completing other course requirements. Schools that offer AP Research in the spring semester should know that students have less time to complete the research project and presentation because all student work must be submitted in the AP Digital Portfolio by April 30, 2025, at 11:59 p.m. ET.

SCHOOLS OFFERING AP SEMINAR AND AP RESEARCH IN A 4X4 BLOCK SCHEDULE

Due to the design of the through-course performance tasks in AP Seminar and AP Research, it isn't ideal to offer AP Seminar and AP Research in a 4x4 block schedule. However, if your school proceeds with this type of schedule, please consider the following:

- **Schedule as full-year course.** AP Seminar and AP Research are both offered as full-year instructional classes spanning all semesters/trimesters/quarters/etc. Schools pursuing this schedule must ensure that the same students are enrolled in the same classes during all semesters. This would require students to pair AP Seminar or AP Research with another course.
- **Schedule as fall semester course with dedicated support during spring semester.** AP Seminar and AP Research are offered during the fall semester; this allows students to have dedicated independent work time and access to AP Seminar and AP Research teachers and classmates.

  Schools pursuing this option for AP Seminar should schedule dedicated instructional days during the second semester for AP Seminar students and teachers to review the following:

  - **Performance Task 1.** Team Multimedia Presentations, if not completed in the prior semester
  - **Performance Task 2.** Instructions and stimulus materials, which are released in January
  - **Performance Task 2.** Individual Multimedia Presentations

CONSIDERATIONS FOR DETERMINING CLASS SIZES AND COMBINING CLASSES

- **Class Size Recommendations**

  Although decisions about class sizes are made by individual schools, the recommended class size for AP Seminar and AP Research courses is 20–24 students, an optimal size for fostering collaboration and teaching presentation skills. School leaders scheduling AP Capstone courses should consider the responsibilities and requirements of teacher assessment scoring. For example, an AP Research teacher with 40 students will need to schedule and score 40 Presentations and Oral Defenses, each requiring 20 minutes. School leaders and teachers need to coordinate closely to ensure that there's enough time to schedule presentations and assessment scoring activities to meet the April 30, 2025, 11:59 p.m. ET deadline.

  Schools with large class sizes and/or many class sections are strongly encouraged to assign multiple AP Seminar and AP Research teachers to manage the scheduling and scoring of student presentations because the time frame of the presentations coincides with AP Exam preparation in the spring.

- **Combining AP Seminar or AP Research with Another AP Class**

  There are scenarios in which schools have to combine an AP Seminar class or AP Research class via an anchor AP course or a concurrent AP course. School leaders must consider additional instructional time to satisfy learning objectives in both courses. Please note: AP Seminar classes and AP Research classes can't be offered concurrently to the same students. (See the **Prerequisite** policy posted on **AP Central** for details.)

OFFERING AP CAPSTONE TO HOMESCHOOLED AND VIRTUAL SCHOOL STUDENTS

- **For Students**

  Homeschooled and virtual school students who wish to participate in AP Capstone have the opportunity to do so through a virtual or local brick-and-mortar school. Independent study for AP Seminar or AP Research is not permitted. Virtual and brick-and-mortar schools may have their own local deadlines and policies regarding instruction and testing; therefore, students should do the following as early as possible:

  - Use the **AP Course Ledger** to find a virtual or local brick-and-mortar school that offers AP Seminar or AP Research.
  - Find a school to arrange testing. The AP coordinator for a school that agrees to order and administer exams for homeschooled and virtual school students will create an exam only section in AP Registration and Ordering for that subject and add those students.
  - AP Seminar students are required to participate in a team project and must ensure they are assigned to work with team members.
  - Students must enroll in both an exam only section and a teacher-led class section in order to have access to resources assigned by the teacher for the class section as well as for teachers to submit presentation scores for students in the AP Digital Portfolio.

Note: AP Research doesn't have an end-of-course exam, but an exam must be ordered for a student in order for their performance task to be scored.

- **For Accredited Virtual School Providers**

  Some best practices for offering AP Seminar or AP Research in a virtual setting include:

  - Scheduling classes in a synchronous format
  - Providing opportunities for students to collaborate outside of classroom hours through online platforms (e.g., Zoom, Google Meet)
  - Grouping AP Seminar students for Performance Task 1 based on their scheduling availability

More information about special ordering circumstances can be found on **AP Central** and in **Part 1** of the *AP Coordinator's Manual*.

Positioning AP Capstone Courses in Your Master Schedule

The flexibility of AP Capstone allows program implementation in a variety of settings and in academic disciplines of choice. Because AP Seminar and AP Research are both skills based, the courses can be associated with any academic content area. Schools may position the courses as required core classes or as electives as long as they abide by any applicable state and district policies. Schools should also confirm that course designations of AP Seminar and AP Research align with entry requirements of higher education destinations for their students.

The following table lists implementation models, along with the pros and cons associated with each. These options help meet the demands of the school curriculum, state and district requirements, and local school traditions and culture.

SCHEDULE VARIATION TYPE	EXAMPLE	PROS	CONS
Core course, English	AP Seminar is offered as an English course, satisfying both a core credit and/or a fourth year of English for graduation requirement.	▪ Gives more students the opportunity to access AP Seminar. Allows teachers the flexibility to integrate state standards.	▪ Requires additional funding to train and support English teachers.
Gradewide implementation	AP Seminar is offered as a required course for all students in grade 10.	▪ Gives students a chance to develop critical research skills that can apply across all disciplines and transfer to other courses.	▪ Requires additional funding to train and support teachers.
AP course anchor	All AP Capstone students are enrolled in a common AP course known as an anchor course. For example, all AP Seminar students are enrolled in AP U.S. History or all AP Research students are enrolled in AP Biology.	▪ Permits interdisciplinary instruction that supports student mastery of AP Capstone skills and enhances performance in the AP anchor course. ▪ Gives students a chance to apply AP Capstone skills in an AP content area. ▪ Fosters collaboration between teachers in different content areas.	▪ Presents master schedule complications in scheduling students for 2 courses and in scheduling common planning time for teachers to develop instructional strategies and lesson plans. ▪ Increases program costs because the AP content teacher should be trained in AP Seminar and/or AP Research curriculum and assessment.

SCHEDULE VARIATION TYPE	EXAMPLE	PROS	CONS
Concurrent enrollment in an AP course	AP Capstone courses are integrated with AP courses. For example, AP Seminar and AP United States Government and Politics are taught concurrently, or AP Research and AP Chemistry are taught concurrently.	▪ Provides students with an immediate opportunity to apply rigorous college-level critical skills to rigorous college-level content.	▪ Requires 1 teacher to balance the demands of 2 AP courses in 1 course.
Distinct, tailored sections or academy setting	AP Capstone courses are offered in multiple sections tailored to emphasize a specific area of interest or in the context of an existing school program. For example, AP Seminar or AP Research or both are offered as both a science and a social science course or as part of a public service or health sciences academy.	▪ Allows students to focus on a particular area of interest while acquiring a broad perspective on real-world issues. ▪ Enhances an existing content curriculum or academy curriculum in preparation for specialized higher education.	▪ Limits the opportunity for students to explore topics and perspectives outside of their interest areas. ▪ Limits the interest of students who may not fall within specific departmental or academy requirements.
Non-AP course anchor	AP Capstone courses are integrated with existing non-AP courses. For example, AP Seminar and an art history elective are taught concurrently, or AP Research and a statistics elective are taught concurrently.	▪ Provides an instructional framework for the existing course. ▪ Provides students with the opportunity to learn specific academic content, along with the skills taught in AP Seminar and AP Research. ▪ Fosters collaboration between teachers in different content areas.	▪ Creates tension between the original curriculum and the requirements of AP Seminar and AP Research. ▪ Limits students' ability to explore issues that speak to their personal interests.

SCHEDULE VARIATION TYPE	EXAMPLE	PROS	CONS
Independent, interdisciplinary elective	AP Capstone courses are offered as independent electives. (Note: AP Seminar is a prerequisite to AP Research. AP Research can't be offered independently.)	▪ Provides students with college-level critical skills that can be applied across disciplines. ▪ Benefits those students who show potential for AP coursework but haven't yet enrolled in AP courses.	▪ Elective designation may limit opportunities for students to complete both AP Seminar and AP Research.

Adding AP Capstone to Student Transcripts

Schools may choose to add a subtitle to their AP Seminar or AP Research courses (e.g., AP Seminar: [Subtitle]) that indicates a special disciplinary focus or emphasis as long as it complies with local, district, and/or state/country policies.

INCORPORATING AP SEMINAR AS AN ENGLISH COURSE

Many schools offer AP Seminar as an English course due to a growing number of states granting AP Seminar as a state graduation requirement for English.

Schools adopting this implementation model can add a specific designation to students' transcripts. For instance, 10th-grade students who take AP Seminar as their English course can have the designation "English 10: AP Seminar" on their transcript. Similarly, for 11th grade, the course can have the designation "English 11: AP Seminar."

Addressing the AP Capstone Diploma Requirements

To earn the AP Capstone Diploma, students must earn a score of 3 or higher in both AP Seminar and AP Research as well as a score of 3 or higher on 4 additional AP Exams of their choosing. The exams may be taken at any time during high school and need not be concurrent with the AP Seminar and the AP Research courses. No specific AP courses, other than AP Seminar and AP Research, are required for the AP Capstone Diploma.

Accessing AP Capstone Awards

Students who earn the AP Capstone Diploma or AP Seminar and Research Certificate can view and print their diploma or certificate online through their AP score report in July. The award is also acknowledged on any AP score report that's sent to colleges after the award has been conferred.

Administrators can access this information through their AP educator score reports at **AP Score Reports for Educators**.

Staffing AP Capstone Courses

The selection of AP Seminar and AP Research teachers is critical to the success of the AP Capstone program. The most effective AP Capstone teachers are those who are curious about real-world issues, are competent in teaching a skill-based rather than a content-based course, and are master facilitators of student learning, allowing students to take charge of their own learning. Teachers who have experience conducting and/or supervising independent research may be considered as well.

AP Seminar and AP Research teachers aren't required to have specific content-area certification unless this is stipulated by local, district, or state/country policy.

All AP Seminar and AP Research teachers are required to attend an AP Capstone Summer Institute before their first academic year teaching the respective course.

Note: Administrators should be aware of the amount of time needed for scoring student work when assigning teachers to multiple sections of AP Seminar and/or AP Research. Although AP Seminar teachers may also teach AP Research, administrators should ensure that they're properly supported, especially in the spring when student work and teachers' scores are submitted.

The most successful AP Seminar and AP Research teachers demonstrate the ability to:

- Explore academic and real-world questions, problems, and issues from different disciplines and from multiple perspectives.
- Teach college-level thinking and research skills such as writing a thesis, conducting research, evaluating sources, developing arguments, and designing, planning, and conducting a research-based investigation.
- Teach time management, collaboration, oral communication, and presentation skills.
- Facilitate student learning in collaborative settings such as workshops and tutorials.
- Motivate students to think critically and innovatively about research questions.
- Collaborate closely with an AP Capstone team that includes administrators, AP teachers, media specialists, school counselors, and expert advisers.
- Manage scoring and submit student work according to submission deadlines.
- Modify instruction style in order to accommodate through-course performance tasks and skills-based learning outcomes.

Prior experience teaching AP or other college-equivalent courses taught in their high school isn't required.

The following table offers several staffing models along with the pros and cons associated with each.

SCENARIO	PROS	CONS
Different teachers are assigned to AP Seminar and AP Research courses.	▪ Teachers are able to specialize in the skills required for success in each course. ▪ Students are exposed to 2 teachers with different strengths that support a diverse learning experience.	▪ Teachers must coordinate a transition from AP Seminar to AP Research to take advantage of the weeks after the AP Seminar assessments are complete. ▪ Teachers must establish and maintain expectations across 2 courses through collaborative planning.
Teachers loop with a cohort of students from AP Seminar to AP Research.	▪ Teachers establish a relationship with students in a 2-year experience that fully develops student strengths and bridges student weaknesses. ▪ Teachers are able to build a seamless transition from AP Seminar to AP Research by maximizing use of available instructional time.	▪ Schools incur a training cost increase because they must send 2 teachers to the required AP Seminar and AP Research summer institute. ▪ Teachers need expertise and a level of comfort in college-level skill development and college-level research methodology.
Two teachers are assigned to AP Seminar or AP Research in a team-teaching structure.	▪ Teachers from 2 different disciplines support a variety of student interests. ▪ Teachers share responsibility for scoring assignments.	▪ Training costs increase because schools must send 2 teachers to the required AP Seminar or AP Research summer institute. ▪ FTE or local district requirements may limit shared responsibility for 1 course.

Getting Others Involved

School leaders should consider convening an AP Capstone team of faculty members to support the implementation of this new diploma program. Regular team meeting agenda items might include management of program implementation, student and teacher support issues, student recruitment, communication with parents and the community, and planning for vertical and horizontal articulation of AP Capstone skills. School or district leaders might also consider appointing a point person for AP Capstone to chair team meetings, ensure effective internal and external communication, and serve as program liaison to College Board. It's suggested that this point person be the school principal, AP coordinator, or AP Capstone teacher, who will receive important messaging from College Board on key updates and deadlines.

Additional AP Capstone team roles and responsibilities include the following:

SCHOOL LEADERS

- Form the AP Capstone team and collaborate with faculty and staff to develop an AP Capstone implementation strategy.
- Create a master schedule that supports broad student enrollment and effective instruction.
- Ensure that teachers have time to complete online scoring training and score student presentations.
- Be sure that teachers and students have access to required high-speed internet and technology appropriate to conduct research, complete multimedia presentations, and submit team and individual projects.
- Fund required AP Capstone Summer Institute and ensure release time for teachers to complete online scoring training.
- Support AP Capstone implementation in communications with students, faculty, parents, and the community.
- Read all communications from College Board about updates to the AP Capstone program.

TEACHERS

- Attend required AP Capstone Summer Institute for AP Seminar and/or AP Research.
- Facilitate student learning.
- Score student presentations and ensure timely upload of student work to College Board.
- Initiate relationships with colleagues or leaders from community organizations, getting them involved in the AP Capstone Diploma program as guest lecturers or expert advisers.
- Manage student–adviser relationships.
- Assist school leadership in the vertical and horizontal expansion of AP Capstone skills.

LIBRARIANS/MEDIA SPECIALISTS

- Ensure that students have access to college-level research materials, including online tools such as EBSCO, JSTOR, and ProQuest. Access to EBSCO Academic Search Complete is provided to AP Seminar and AP Research teachers and students at AP Capstone schools.
- Assist students in identifying and researching a variety of questions across multiple disciplines.
- Contribute to workshops and tutorials that address specific research issues.
- Work with teachers to conduct relevant lessons on research practices.

COUNSELORS

- Familiarize themselves with AP Capstone so they can share highlights of the program with parents and visiting college admissions representatives.
- Assist in identifying students for participation in AP Capstone.
- Help students communicate AP Capstone accomplishments to colleges and universities.
- Ensure that student course selections meet AP Capstone Diploma and/or AP Seminar and Research Certificate requirements.

Expert Advisers for AP Research

Expert advisers are an essential part of the AP Research course and may be drawn from the faculty, the community, local business and industry, or higher education. A designated staff member may also coordinate a pool of advisers for the AP Research course and match students with advisers. AP Research teachers and school administrators identify school and district policies that pertain to students who are engaging virtually or face-to-face with external advisers, and they communicate such policies to parents, students, and potential advisers. See the **Role of Expert Advisers in the Academic Paper** section of the ***AP Research Course and Exam Description***.

Recognition from Higher Education

ADMISSIONS BENEFITS

AP Capstone Diploma candidates enjoy a variety of admissions benefits from colleges and universities before, during, and after application cycles. Various benefits include invitations to meet with research faculty, direct admission into honors programs, and opportunities to join undergraduate research projects.

To facilitate admissions recognition, school leaders and students should indicate participation in the AP Capstone Diploma program in the following ways:

- **School reports to higher education.** School leaders include their school's participation in the AP Capstone Diploma program, along with the number of AP Capstone Diploma awards.
- **Counselor recommendations.** Counselors identify students as AP Capstone Diploma candidates on recommendation forms, including third-party applications such as the Common Application and the Coalition Application.
- **Teacher recommendations.** AP Seminar and AP Research teachers highlight student research projects.
- **Individual honors.** Students designate themselves as AP Capstone Diploma candidates, AP Capstone Diploma recipients, or AP Seminar and Research Certificate recipients in the awards/honors sections of their applications.
- **Including courses on transcripts.** Students and schools indicate AP Seminar and AP Research on high school course transcripts.
- **Admissions interviews and essays.** Students discuss their AP Seminar or AP Research work during admissions interviews and in their admissions essays, where appropriate.
- **Sending AP Seminar and AP Research scores.** Students send AP Seminar and AP Research scores to their preferred higher education institutions.

Note: AP Capstone Diploma candidates are defined as students who have earned a score of 3 or higher in AP Seminar, are enrolled or plan to be enrolled in AP Research, and are also likely to earn a 3 or higher on 4 additional AP Exams, as determined by school administrators.

CREDIT AND PLACEMENT BENEFITS

Several colleges and universities award credit for the successful completion of AP Seminar and AP Research. College Board currently provides information that colleges, universities, and state systems need to make sound, data-driven policy decisions regarding recognition of success in AP Capstone courses.

Visit **collegeboard.org/apcapstonehedsupport** to see a list of colleges and universities that endorse the AP Capstone program and to use the **AP Credit Policy Search** to find specific credit and placement policies.

For Teachers

AP Capstone AP Course Audit Steps

Following the required summer training, new AP Seminar and AP Research teachers are equipped to prepare a course syllabus. The following activities must be completed within their AP Course Audit account:

- Teacher—Complete the course audit form
- Teacher—Submit course syllabus
- AP Course Audit Administrator—Review and approve the course audit form

Schools don't need to specify their implementation approach in the AP Course Audit, though teachers can specify it in the AP Digital Portfolio. There's a variety of implementation approaches for AP Seminar and AP Research, though students complete the same AP Seminar and AP Research Exam.

New teachers can access AP Classroom and the AP Digital Portfolio after their course audit form has been approved.

Some countries, states, and districts may have earlier submission deadlines. Teachers are encouraged to check with school administrators to determine if they should submit syllabi to other authorizing systems before the deadline.

AP Seminar and AP Research teachers must develop and submit a syllabus of their own creation and can't submit the sample syllabus provided during training.

All new 2024-25 AP Capstone teachers must complete a course audit form and submit a syllabus for review.

All previously authorized courses can be renewed by a school administrator beginning March 1, 2024.

Teacher Roles During the AP Capstone Performance Tasks

We recommend that all AP Capstone teachers be transparent with students about their roles and what any individual providing guidance to students should and shouldn't do. As a reminder, students shouldn't receive specific, directive feedback on their performance tasks.

For more information about the roles of AP Capstone teachers, see the ***AP Seminar Course and Exam Description*** and the ***AP Research Course and Exam Description***.

Submitting Student Work Using the AP Digital Portfolio

Students taking AP Seminar and AP Research must use the **AP Digital Portfolio** at **digitalportfolio.collegeboard.org** to submit performance tasks as final by the April 30, 2025, 11:59 p.m. ET submission deadline.

Each school's AP Capstone teachers, students, and AP coordinator interact with the digital portfolio throughout the school year. The following diagram illustrates the roles and major tasks in the process.

Digital Submission for AP Capstone

Completed in My AP ■ Completed in the AP Digital Portfolio

1. **AP coordinator or AP teacher** signs in to **myap.collegeboard.org** at the start of the school year and creates AP Seminar and AP Research class sections. If applicable, the AP coordinator notifies teachers when class sections have been created.
2. **Teachers** sign in to **myap.collegeboard.org** and get the join code for each class section they teach to distribute to students during class.
3. **Students** sign in to **myap.collegeboard.org** with College Board login information and enroll in an AP Seminar or AP Research class section using the join code provided by their teacher or AP coordinator. If instructed to do so by the AP coordinator, students also indicate their exam registration in My AP.
4. **AP coordinator** submits the exam order for all students included in the exam roster in AP Registration and Ordering.
5. **Teacher** creates AP Seminar student teams for team assignments.
6. **Teacher** distributes College Board–provided source material to AP Seminar students.
7. **Students** submit written performance tasks as final in the AP Digital Portfolio no later than April 30, 2025, at 11:59 p.m. ET or an earlier deadline set by their teacher.
8. **Teacher** submits scores for student presentations and completes affirmations for required checkpoints in the AP Digital Portfolio by May 10, 2025, at 11:59 p.m. ET.
9. **AP coordinator** verifies that all students have submitted their written performance task components as final in the AP Digital Portfolio by April 30, 2025, at 11:59 p.m. ET and that teachers have submitted scores for student presentations and completed affirmations in the digital portfolio by May 10, 2025, at 11:59 p.m. ET.
10. Performance tasks and scores for all students that the AP coordinator has ordered an exam for will be automatically submitted to **the AP Program** at the deadline.

TECHNICAL REQUIREMENTS AND RECOMMENDATIONS FOR THE AP DIGITAL PORTFOLIO

- Use a computer, tablet, or mobile device that supports the latest versions of Chrome (preferred), Safari (preferred), Firefox, or Edge, and is connected to the internet.
- The scoring feature isn't available on mobile devices.

For more information about the digital portfolio, see the **AP Digital Portfolio: Teacher User Guide** and the **AP Digital Portfolio: Student User Guide**.

Due Dates for AP Seminar and AP Research Performance Tasks

The deadline for all student work to be submitted to the **AP Digital Portfolio** is April 30, 2025, at 11:59 p.m. ET. Teachers must review final student submissions, score student presentations, and affirm authenticity in the digital portfolio by May 10, 2025, at 11:59 p.m. ET. Although the AP Program recommends interim deadlines for each component of the performance tasks, teachers may choose to set their own interim deadlines, which will be determined by their school calendars and schedules.

AP Seminar End-of-Course Exam Date

The 2025 exam date for the AP Seminar End-of-Course Exam is Monday, May 12, 2025, at 12 p.m. local time. See the complete **2025 AP Exam schedule**.

For detailed information about ordering exams for late testing, see **Part 1** of the *AP Coordinator's Manual*.

Getting Involved with the AP Reading

College Board encourages AP Seminar and AP Research teachers to apply to become AP readers. By participating in the AP Reading, teachers ensure that AP Exams continue to measure a student's ability to master college-level work. Ninety-eight percent of high school AP teachers and college faculty who have participated in more than one AP Reading say that their participation has had a positive impact on their teaching.

AP readers for AP Capstone courses can take advantage of flexible scheduling options, opportunities for professional learning hours, and continuing education credits (CEUs), as well as compensation.

For more information and to apply, visit **collegeboard.org/readap.**

For AP Coordinators

The AP Capstone section of **Part 2** of the *AP Coordinator's Manual* is the primary source of information for AP coordinators at schools offering AP Seminar or AP Research. Download the manual, and review the AP Capstone page for AP coordinators at **collegeboard.org/apcapstonecoordinator**.

Role of the AP Coordinator in AP Capstone

AP coordinators:

- Create class sections in AP Registration and Ordering for their school's AP classes (if teachers haven't already created their own class sections);
- Manage the ordering, receipt, distribution, administration, and return of AP Seminar End-of-Course Exam materials;
- Order AP Research Exams;
- Validate that uploaded student work is submitted as final by the April 30, 2025, (11:59 p.m. ET) submission deadline; and
- Validate that teachers have submitted scores for student presentations and completed affirmations for required checkpoints in the AP Digital Portfolio by May 10, 2025, at 11:59 p.m. ET.

Important: AP Research doesn't have an end-of-course exam, but an exam must be ordered online through AP Registration and Ordering for a student in order for their performance task to be scored by the AP Program.

AP coordinators don't have to manually submit work to the AP Program through the **AP Digital Portfolio** for it to be scored at the AP Reading. All performance tasks that have been submitted as final by a student, and any teacher scores and affirmations associated with those performance tasks, will automatically be sent to the AP Program for scoring after the deadline as long as an exam was ordered for them.

Note: When students provide their registration information in My AP when first enrolling in a class section, they'll be assigned a unique, alphanumeric **AP ID.** This AP ID will automatically be added to the digital portfolio.

Accessing the AP Digital Portfolio

After signing in to **digitalportfolio.collegeboard.org** with their College Board login information, AP coordinators will see all of the AP Capstone class sections that were created in **myap.collegeboard.org** and all students enrolled in each section. A legend at the top of the page helps AP coordinators determine each student's progress toward final submission of their work and whether their presentations have been scored by their teacher.

Checking for Missing Data in the AP Digital Portfolio

AP coordinators should view the status of their AP Seminar and AP Research students' submissions and work with the teacher(s) to resolve:

- Missing student final submissions (before April 30, 2025, at 11:59 p.m. ET).
- Missing teacher scores on presentations (before May 10, 2025, at 11:59 p.m. ET).

Additional Resources

You may find the following resources helpful. Share these resources with the appropriate stakeholders in your school community to foster a successful implementation.

- The **AP Course Ledger** helps you find other schools that offer AP Seminar and/or AP Research.
- The **AP Capstone student brochure** provides an overview of the AP Capstone program and is geared toward a student audience.
- The **AP Seminar** and **AP Research** Course Overviews are short, 2-page overviews of course content and assessments.
- The **AP Capstone section of AP Central** shares an overview of the program, the program benefits, and frequently asked questions.
- The **AP Capstone Higher Education Support page on AP Central** explains how institutions support the program and provides a link to the **AP Credit Policy Search** for finding specific credit and placement policies for AP Seminar and AP Research.
- This **AP Capstone video** provides an overview of the program with supporting commentary from prominent higher education admissions professionals.
- The second **AP Capstone video** features 2 of our current AP Seminar students, who speak about their experiences with AP Seminar and the AP Capstone program.
- The third **AP Capstone video** features students discussing their projects and topics of inquiry in the AP Research course.
- The **AP Seminar** and **AP Research** course pages on AP Central contain information, resources, and other helpful content for both courses.
- The **English 10: AP Seminar** page shares sample syllabi and other resources to help English 10 teachers integrate AP Seminar into their courses.
- The ***AP Digital Portfolio: Student User Guide*** tells students how to use the digital portfolio, including submitting work as final.
- The ***AP Digital Portfolio: Teacher User Guide*** tells teachers how to use the digital portfolio, including managing teams and scoring student work.

2024-25 Important Dates

DATE	ACTIVITY
June–August	AP Seminar and AP Research summer institute.
July–August	**AP Classroom** and **AP Registration and Ordering** open.
August–September	AP Seminar and AP Research instruction begins. Students can access EBSCO and Turnitin through the **AP Digital Portfolio** once they have enrolled in their AP Seminar or AP Research class section in My AP.
October 4	Preferred deadline for AP coordinators to order AP Exams through **AP Registration and Ordering**.
November 15 by 11:59 p.m. ET	Final deadline to submit your exam order for all full-year and first-semester AP courses, and all exam only sections, without incurring additional fees. Exams can be ordered or canceled after this date, although a fee applies in some cases.
November 30	Recommended deadline for students to submit and teachers to approve AP Research Proposal Forms.
December	Required online scoring training for AP Seminar and AP Research launches.
January	Stimulus material for the AP Seminar Individual Research-Based Essay and Presentation is released to AP Seminar teachers in the **AP Digital Portfolio**.
January 31	Final deadline for new teachers to complete and returning teachers to renew the AP Course Audit.
January–March	Begin scheduling current AP Seminar students for AP Research and recruiting new AP Seminar students.
March 14 by 11:59 p.m. ET	Spring course orders and fall order changes deadline for AP coordinators to make final updates to the school's order through **AP Registration and Ordering**, if needed. Fees may apply.
March 28	Recommended deadline for all AP Seminar and AP Research teachers to complete required online scoring training modules.
April 30 by 11:59 p.m. ET	Deadline for all student work to be submitted as final in the **AP Digital Portfolio**.
May 10 by 11:59 p.m. ET	Deadline for teachers to submit scores for student presentations and complete affirmations in the AP Digital Portfolio.
May 12	Administration of AP Seminar End-of-Course Exam.
May 20	Late-testing administration of the AP Seminar End-of-Course Exam.
May–June	AP Research teachers should meet with AP Seminar students to discuss the course, get students ready to work with a consultant/expert adviser, identify a topic of interest, and develop a research question.
July	AP score reports, including AP Capstone awards, released online.

About College Board

College Board reaches more than 7 million students a year, helping them navigate the path from high school to college and career. Our not-for-profit membership organization was founded more than 120 years ago. We pioneered programs like the SAT® and AP® to expand opportunities for students and help them develop the skills they need. Our BigFuture® program helps students plan for college, pay for college, and explore careers. Learn more at **cb.org**.

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CollegeBoard

Attachment 3

AP Professional Learning

AP® Professional Learning Opportunities



AP Subject Workshops

AP® subject workshops help AP teachers plan and focus their instruction and earn continuing education units (CEU). The workshops cover the following topics:

- **Course and Exam Description (CED) and Course Planning:** Discuss developing a semester and/or yearlong instructional plan that incorporates all units, topics, and skills of the course, as referenced in the CED.
- **Expanding AP Opportunities:** Discuss strategies to create a supportive AP classroom for all students and to encourage students to participate in AP, including underrepresented students.
- **Strategies and Pedagogical Tools:** Identify instructional strategies and tools to teach the content and skills in the course and exam description.
- **AP Classroom and AP Daily:** Explore how AP Classroom can be utilized to develop each skill/practice and develop lesson plans that reinforce topic and skill connections. AP Daily videos are led by experienced AP teachers to help students understand essential course concepts. The videos are short and available on-demand.
- **Assess and Reflect:** Practice interpreting data within the Instructional Planning Report to identify student strengths and weaknesses and reflect on implications for instruction.

You'll concentrate on these AP resources: AP Classroom, Instructional Planning Reports, Syllabus Development Guide, Sample Syllabi, and the AP Teacher Community.



*English 10: AP Seminar, Research, and Seminar are only offered as 30-hour workshops.

AP workshops are available in person and online in the following subjects:

- African American Studies
- Art and Design
- Art History
- Biology
- Calculus AB
- Calculus BC
- Chemistry
- Chinese Language and Culture
- Comparative Government and Politics
- Computer Science A
- Computer Science Principles
- English 10: AP Seminar*
- English Language and Composition
- English Literature and Composition
- Environmental Science
- European History
- French Language and Culture
- German Language and Culture
- Human Geography
- Italian Language and Culture
- Japanese Language and Culture
- Latin
- Macroeconomics
- Microeconomics
- Music Theory
- AP Physics 1: Algebra-Based
- AP Physics 2: Algebra-Based
- Physics C: Electricity and Magnetism
- Physics C: Mechanics
- Precalculus
- Psychology
- Research*
- Seminar*
- Spanish Language and Culture
- Spanish Literature and Culture
- Statistics
- U.S. Government and Politics
- U.S. History
- World History: Modern

Cross-Curricular Workshops in AP*

Several cross-curricular workshops are available for educators from different disciplines or roles to attend together. Districts, states, and schools can host these workshops for their teachers in person or online.

Achieving AP Access for All

Each Achieving AP Access for All workshop is customized for teachers and administrators in a single district or school to explore how to create an AP program devoted to improving access to advanced academics for all students.

Participants will:

- Identify policies, procedures, and tools that can be used to increase student participation in AP.
- Discuss curriculum adjustments and instructional strategies to recruit and retain students who have traditionally not had access to AP courses.
- Identify district-, school-, and classroom-level policies and practices that enhance or restrict student opportunities to take AP courses and exams.

Developing Evidence-Based Written Arguments in AP Courses

In this three-hour workshop, teachers gain a better understanding of how students develop evidence-based written arguments.

In this interactive workshop, participants will:

- Learn how to assess evidence-based written arguments and the reasoning process.
- Relate common student misunderstandings and learn how to help correct them.
- Discover how AP Exam rubrics can be used to reinforce and develop argumentation skills.
- Learn instructional strategies that can be used to help students develop evidence-based written arguments.

Participants will have time to collaborate with colleagues from other AP courses to explore how these skills and understandings can be introduced in courses that build toward AP within a discipline and reinforced within AP courses across disciplines.

AP Course Skills and Practices

This three-hour workshop provides an overview of the intersection of skills that cross all AP courses and exams. This workshop helps both AP and non-AP teachers understand the skills that are critical for college and career success. The workshop provides participants with an understanding of how the skills increase in complexity within and across courses and grades.

Specific topics include:

- Teaching for understanding and transfer.
- Understanding AP skills and practices.
- Practice and feedback.
- Using AP resources to build skill development.

This workshop may be expanded to a six-hour workshop that includes opportunities for teachers and teams to plan ways to build skill development within and across the curriculum.

Developing Quantitative (Scientific and Mathematical) Arguments in AP Courses

In this three-hour workshop, teachers gain a better understanding of how students develop quantitative mathematical and scientific arguments and how related reasoning processes are embedded in their own and other AP courses.

In this interactive workshop, participants will:

- Learn how to assess quantitative arguments.
- Relate common student misunderstandings and learn how to help correct them.
- Discover how AP Exam rubrics can be used to reinforce and develop quantitative arguments.
- Review instructional strategies to help students develop quantitative arguments.

Participants will have time to collaborate with colleagues from other AP courses to explore how these skills and understandings can be introduced in courses that build toward AP within a discipline and reinforced within AP courses across disciplines.

*Cross-curricular workshops are offered in person and online.

Analyzing and Interpreting Quantitative Data in AP Courses

In this three-hour workshop, teachers gain a better understanding of how students analyze and interpret quantitative data.

In this interactive workshop, participants will:

- Learn how to assess students' abilities to analyze and interpret quantitative arguments.
- Relate common student misunderstandings and learn how to help correct them.
- Discover how AP Exam rubrics can be used to reinforce and develop students' abilities to analyze and interpret quantitative data.
- Review instructional strategies to help students develop their ability to analyze and interpret quantitative data.

Participants will have time to collaborate with colleagues from other AP courses to explore how these skills and understandings can be introduced in courses that build toward AP within a discipline and reinforced within AP courses across disciplines.

Analyzing Context and Situations in AP Courses

In this three-hour workshop, teachers gain a better understanding of how students analyze context and situations.

In this interactive workshop, participants will:

- Learn how to build students' abilities to analyze context and situations.
- Discover how AP Exam rubrics can be used to reinforce and develop students' abilities to analyze context and situations.
- Relate common student misunderstandings and learn how to help correct them.
- Review instructional strategies to help develop students' abilities to analyze context and situations.

Participants will have time to collaborate with colleagues from other AP courses to explore how these skills and understandings can be introduced in courses that build toward AP within a discipline and reinforced within AP courses across disciplines.

View the **pricing guide** and **order a workshop** for your AP teachers.

Cross-Curricular Workshop Recommendations by Subject

The following chart shows which cross-curricular workshops are most relevant for AP teachers across subjects.

	AP Skills and Practices	Evidence-Based Written Arguments	Developing Quantitative Arguments	Analyzing and Interpreting Quantitative Data	Analyzing Context and Situations
African American Studies	•	•			•
Art and Design (2-D, 3-D, and Drawing)	•				
Art History	•	•			•
Biology	•		•	•	
Calculus AB and BC	•		•		
Chemistry	•		•	•	
Chinese Language and Culture	•	•			•
Computer Science A	•		•		
Computer Science Principles	•				•
Economics (Macro and Micro)	•			•	•
English Language and Composition	•	•			•
English Literature and Composition	•	•			
Environmental Science	•			•	
European History	•	•			•
French Language and Culture	•	•			
German Language and Culture	•	•			•
Government and Politics: Comparative	•	•			•
Government and Politics: U.S.	•	•			•
Human Geography	•				•
Italian Language and Culture	•	•			•
Japanese Language and Culture	•				•
Latin	•				•
Music Theory	•				
Physics 1, 2, and C	•		•	•	
Precalculus	•		•		
Psychology	•			•	
Research	•	•		•	
Seminar	•	•		•	
Spanish Language and Culture	•	•			•
Spanish Literature and Culture	•	•			
Statistics	•		•	•	
U.S. History	•	•			•
World History: Modern	•	•			•

AP Summer Institutes

AP Summer Institutes are 30-hour teacher training programs led by experienced AP educators. Offered online and in person, AP Summer Institutes equip AP teachers with new teaching strategies, instructional materials, and a supportive teacher community.

What Teachers Learn

During AP Summer Institutes, teachers explore course and exam descriptions, gain access to resources, and earn CEUs. AP Summer Institutes prepare teachers to:

- Implement and teach an AP course curriculum
- Adjust the course pacing for optimal student success
- Create effective lesson plans based on exam content and skill pairings
- Leverage AP Classroom and instructional planning reports to support students
- Apply scoring guidelines from the most recent AP Exam to student work

What Past Participants Say

"I left feeling empowered to start the school year."

"I believe this workshop has instantaneously made me a better AP teacher."

AP Summer Institutes by the Numbers

AP teachers who attend an AP Summer Institute are better prepared to teach their courses and see a higher percentage of students take the AP Exam.

77% of participants recommend attending an AP Summer Institute.

96% of participants felt satisfied with the course and exam description review.

95% of participants said their presenter effectively delivered workshop material.

94% of participants found value in the instructional strategies and resources.

New AP teachers who attended an AP Summer Institute saw **7% more students** take the AP Exam than teachers who didn't attend.

How to Register for an AP Summer Institute

Teachers can search and register for AP Summer Institutes using the **AP Professional Learning Event Calendar**. Teachers planning to teach AP Seminar or AP Research for the first time are required to attend an AP Summer Institute.

AP Summer Institute fees vary by host institution and are due at the time of registration. College Board offers a limited number of AP **participant grants** that cover the registration fee for eligible teachers.

Learn more at **collegeboard.org/apsi**.

AP Project Based Learning Series

The **AP Project Based Learning (PBL) Series** is a one-year professional development program for AP teachers interested in implementing a project based instructional approach. Project based learning incorporates hands-on projects to help students build skills in critical thinking, problem-solving, collaboration, and communication.

This series is available in the following AP courses:

- **Environmental Science**
- **Human Geography**
- **Statistics**
- **U.S. Government and Politics**
- **World History: Modern**

AP Teacher Benefits

PBL Series participants attend a four-day AP Summer Institute online ($799) or in person ($1,299), receive project implementation guides, and engage in project-specific online sessions during the school year.

This series helps AP teachers:

- Identify how AP content and skills are developed within and across the course projects.
- Apply high-quality PBL design elements and teaching practices.
- Simulate and model PBL practices using examples from the course projects.
- Adapt the projects and prepare to implement them with your students.

AP teachers who complete the series can earn CEUs.

What Past Participants Say

"The Project Based Learning Series helped me completely revamp my course, and I found this new spirit; it gave me my second wind."

"These sessions helped renew my energy in teaching with the collaboration and support they offer. They have also helped me identify where I can improve."

How to Register for the AP PBL Series

Visit the **AP Professional Learning Event Calendar for Project Based Learning Series. AP participant grants** are available to cover the registration fee for eligible teachers.

Learn more about the AP Project Based Learning Series at **collegeboard.org/PBLSeries.**

For more information about AP Professional Learning programs, visit:
apcentral.collegeboard.org/professional-learning

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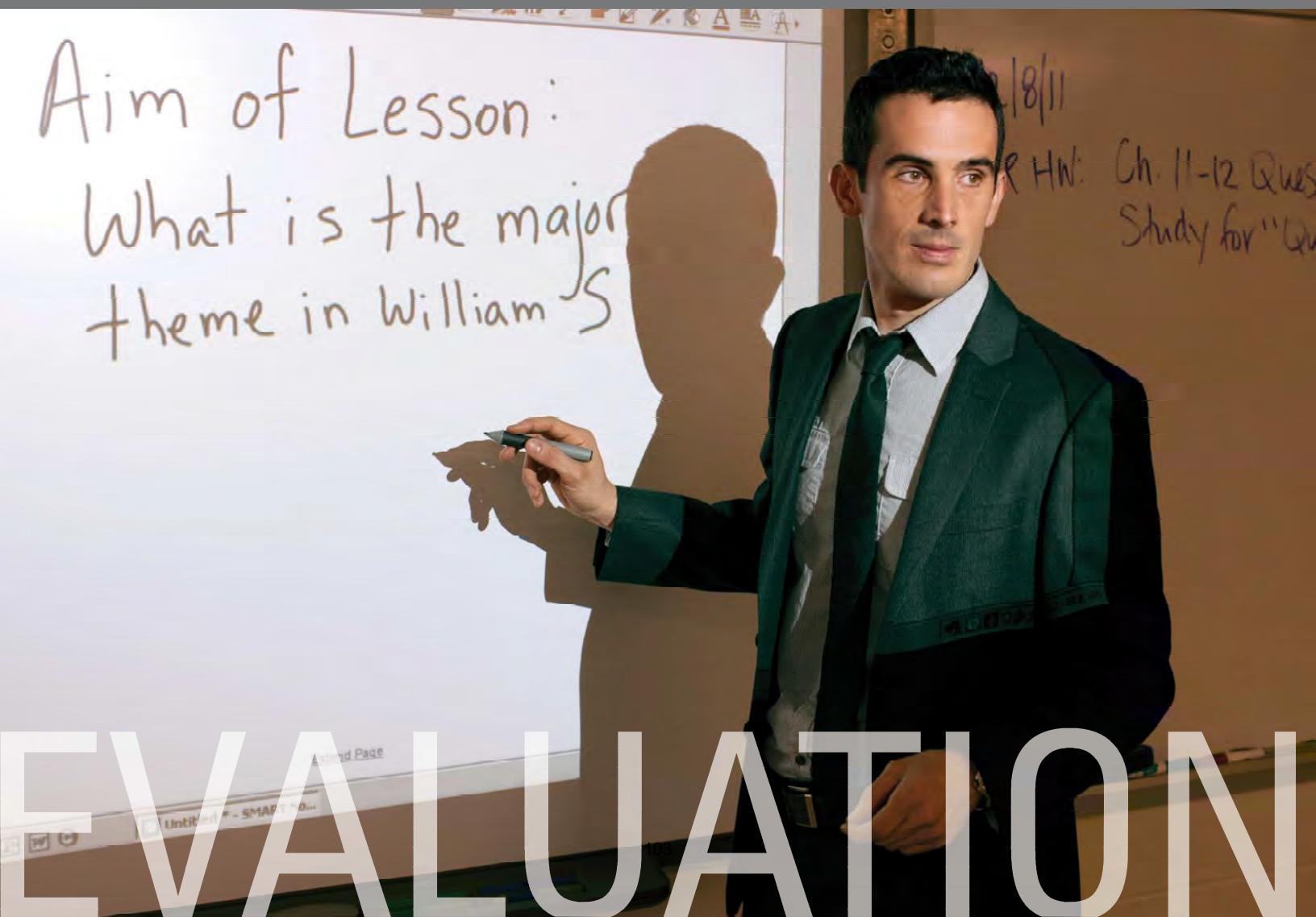
RESEARCH REPORT 2012-8

CollegeBoard

An Analysis of the Relationship Between School-Level AP® Professional Development Activity and Subsequent Student AP Performance

By Vytas Laitusis



EVALUATION

Vytas Laitusis is a research scientist at the College Board.

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Executive Summary

The overarching purpose behind this evaluation was to gauge the impact of AP® professional development (PD) on AP student outcomes in a state with a significant rate of PD implementation. The evaluation attempted to predict the level of student AP performance by the number of AP professional development events attended by teachers in that school in the prior year, while controlling for some socioeconomic status (SES), teacher, and school effects. The outcomes predicted by the number of PD events attended were defined as the average AP score obtained for that school as well as the percentage of AP Exam takers scoring 3 or above. A similar analysis was also performed for AP courses comprising the STEM disciplines (Biology, Chemistry, Computer Science, Environmental Science, Calculus AB, Calculus BC, Physics B, Physics C: Mechanics, Physics C: Electricity and Magnetism, and Statistics). The controlling factors (covariates) used in the analyses were average household income (a proxy for SES), the percentage of students taking AP in the school (school effect), and the average number of years teaching AP (teacher effect).

The results were as follows:

- After controlling for average household income (SES), level of AP activity, and teacher experience, schools with higher levels of teachers participating in AP PD were more likely to have higher levels of overall average AP performance (average exam score and average percentage of exams with scores of 3 or above) the following year.
- In addition to the number of PD events attended, teacher experience was also a statistically significant predictor of subsequent overall AP performance.
- For STEM-related AP Exams only, the level of AP PD attended by teachers in the school was also a statistically significant predictor of subsequent AP performance. Teacher experience was also significant and more predictive for AP STEM course performance than overall AP performance (reported in the previous bullet).

Given some data access restrictions that did not allow for teachers to be directly linked to their students, drawing direct causal inferences between AP PD and positive student outcomes is not warranted. In addition, there was no information collected regarding implementation of skills learned from the PD. However, the results do point to the potential unique contribution that a school's level of AP PD activity may have on subsequent student success on AP Exams while accounting for a set of school environmental factors.

Introduction

The continuing education of teachers has long been considered a cornerstone to improving our education system (Borko & Putnam, 1995; Darling-Hammond, 1993). Although the field of PD is varied in terms of approach and apparent outcomes, Desimone (2009) has identified a set of well-accepted characteristics of professional development (content focus, active learning, coherence, duration, and collective participation) that serve as a foundation for these efforts. Although there is some value placed on the direct impact of PD on teachers in the areas of job satisfaction, increased content, or pedagogical knowledge, students should ultimately be the beneficiaries of this training. However, this indirect effect of PD on student outcomes raises significant challenges for measuring any potential impact of the PD program. If PD is to affect student outcomes, success is contingent upon the acquisition of skills and strategies by the teacher. Once teachers possess these skills, they must implement them effectively in the classroom. In addition, although it seems plausible to expect some indirect impact of a teacher's newly acquired skills on students, it is equally important to note the complexity of the system with which student learning takes place. Educators do not teach and students do not learn in a vacuum; they are part of a complex dynamic of social, financial, and educational factors. In assessing the efficacy of any program, it is important to acknowledge this complexity.

The relative level of PD engagement within a school or some amount of collective participation has been shown to have positive effects by promoting an atmosphere of shared understanding among colleagues regarding goals, methods, problems, and solutions (Ball, 1996). In addition, research has clearly demonstrated that PD should be a sustained effort as opposed to a singular event in order to be effective (Guskey & Yoon, 2009). This finding highlights the importance of a school or district engaging in and maintaining an active program of PD. There is also evidence that the benefits of PD are not necessarily apparent immediately and that there is often a lag from the time PD is delivered to an effective manifestation of that PD in the classroom (Guskey, 2000). Evaluations need to take this potential latency into account when planning impact studies so the effects on students have adequate time to manifest themselves. It also points to the importance of evaluation studies to follow up on outcomes initially and then continue over an extended period of time.

The current study investigated the relationship of a school's level of AP PD activity on subsequent student performance on the AP Exam while controlling for teacher, school, and SES effects. In an effort to account for factors outside of AP PD participation that might influence student AP performance, the analyses included proxies for these effects such as years of experience (teacher), level of AP activity (school), and average household income (SES). Teacher experience was defined as the mean number of years teaching AP. Research has demonstrated that more years of teaching experience can have a positive impact on student performance though these results tend to be mixed (Wenglinsky, 2002; Rice, 2010). A majority of the positive effects are generally seen when comparing new teachers to those who have several years of experience. The benefit of experience does not increase at the same rate that experience increases (Rice, 2010; Goe, 2007; Wenglinsky, 2002). For example, the effect of experience when comparing a new teacher to a teacher with five years' experience is more pronounced than when comparing a teacher with 20 years' experience to another with 25. The relationship between SES and educational outcomes has been a pervasive topic for several decades since it was highlighted in the work of Coleman (1966). For the purposes of this study, a proxy for SES (average household income) was used. Average household income was taken from the National Center for Education Statistics (NCES) database and provides some information on the economic standing of the students in the school.

The current study examined the relationship between the level of AP PD activity undertaken in a school and the subsequent utility of that PD in predicting student outcomes while accounting for student, teacher, and school effects. More specifically, the current study examines the level of AP PD activity and subsequent AP performance both in terms of average grade and percentage of students scoring a 3 or above (which is often used as an indicator of success). The analyses focused on AP outcomes for all subject areas as well as those only related to STEM courses.

Following an overview of the AP professional development program, this report will describe the methodology used to examine these outcomes. Two sets of analyses will be reported. The first will simply examine the differences in student outcomes given the level of school engagement in AP PD. The second analysis will also utilize the level of school AP PD activity and incorporate other potentially mediating school, teacher, and student effects into a prediction model of subsequent student AP performance. The report will conclude with a discussion of the study's broader implications and limitations.

AP Professional Development

In order to reach a large constituency and provide a variety of PD offerings, the AP Program enlists the support of a large network of educators to conduct a wide array of workshops and institutes. AP workshops are led by an accomplished member of the AP community and/or a College Board–endorsed consultant. The workshops typically guide participants through the skills students must master in the AP classroom and the most innovative teaching practices to help engage students. These PD events often concentrate on specific subject-area topics and offer curricular assistance for new, intermediate, and experienced AP teachers.

Some recent research has supported the notion that this AP PD is perceived by teachers as an effective factor in their teaching and that this perception is maintained after implementing the newly obtained strategies in their own classrooms (Godfrey, 2009; Laitusis & Barry, in press). Although the positive perceptions of teachers are valuable, evidence relating to the efficacy of this PD on student performance is also of ultimate concern. Bausmith and Laitusis (in press) investigated the impact of the AP Achievement Institute I (APAI I) on subsequent student AP performance. The study matched a set of students to their participating teachers before their engagement in PD and then matched a subsequent cohort of students to these same teachers after the PD. The results indicated that although the teacher classrooms had become more diverse and represented lower levels of student prior achievement (as indicated by state assessment data), student performance outcomes on AP were maintained from the prior year (Bausmith & Laitusis, in press). Although these results seem promising and student prior achievement was taken into account, other factors such as school and teacher effects that may influence outcomes were not incorporated. The current study attempts to address the greater level of complexity inherent in an educational setting by incorporating school, teacher, and students effects into a PD model predicting student AP success.

Method

The study utilized the AP PD activity of a set of teachers in a Midwestern state for the 12-month period leading up to an academic year. Then the AP data from the students who attended the schools where these teachers taught were matched using data from the following spring administration. The original sample used for analysis consisted of 309 schools with AP Exam data. In order to increase the stability of any statistical analysis, only schools with at least five or more test-takers were retained. This resulted in a reduced sample of

247 schools (i.e., 80%). Due to the reliance on background data obtained from additional extant databases (NCES), there were several additional schools that were removed from the regression analysis, resulting in a data set with 197 schools. Since the purpose of the second analysis was to investigate the relationship between the level of AP PD and student AP outcomes, only schools that had PD participation information in the database were retained for the regression analysis, which further reduced the sample to 136 schools.

The number of AP PD events was aggregated from an internal database of teachers who had registered for College Board–sponsored AP PD offerings during a 12-month time period leading up to the school year. If a school did not show any record of teachers attending AP PD during the experimental window, they were assumed to have not participated in PD. It is unknown whether any of the teachers in these schools also participated in other forms of PD or attended AP PD that was not recorded in the database. The PD events represented a fairly broad range of topics and ranged in duration from one to five days. The unit of analysis representing AP PD activity for this study was the number of AP PD events attributed to a school in a particular 12-month period leading up to an administration year. Outcome data (student AP scores) were then obtained for this subsequent administration year. For example, the level of school AP PD activity from September 2004 through August 2005 was used to predict student AP performance in the spring of 2006 administration. Since matched teacher–student data could not be obtained, the unit of analysis was at the school level so all teacher PD participation and student performance were aggregated up to the school level.

In addition to examining the relationship between the level of AP PD and overall AP performance, the study also examined student performance on a subset of the exams relating to the STEM disciplines (Biology, Chemistry, Computer Science, Environmental Science, Calculus AB, Physics B, Physics C: Electricity and Magnetism, Physics C: Mechanics, and Statistics).

Two sets of analyses were undertaken to examine the relationship of AP PD activity and student performance on AP. First, two one-way analyses of variance (ANOVAs) were undertaken to examine whether student AP performance measured as mean AP Exam score and percentage of exams with a score of 3 or above was statistically significantly different across three levels of teacher activity in AP PD. Second, to control for other variables that have been shown to be related to student performance, a regression analysis was used to examine the relationship of AP PD activity on student AP performance when teacher experience, SES levels, and school AP activity were controlled. AP activity was an indicator of the relative size of the AP program at the school and was computed as the percentage of students at the school taking at least one AP Exam. The unit of analysis for all indicators was at the school level.

Results

Although the schools with no AP PD data for the year in question were not retained for the regression (second) analysis, it was still of interest to understand the characteristics of this group of teachers and how they compared to the sample used in the study. In order to accomplish this, a one-way ANOVA was performed comparing three groups of schools: (1) schools with no known AP PD activity, (2) schools with low AP PD activity, and (3) schools with higher AP PD activity. A second ANOVA was conducted using the percentage of AP Exam scores at or above a score of 3 as the performance outcome. The categories representing the level of AP PD activity were determined by taking a median split of the PD activity variable, which turned out to be 3 or fewer events for low and more than 3 for high

activity. Student performance in terms of mean exam score as well as mean percentage scoring 3 or above are displayed in Table 1 for each of these groups.

Table 1.

Mean Student AP Performance Outcomes on All Exams by Prior Year AP PD Participation

Outcome	AP PD Events	*n*	*Mean*	*SD*	*SE*
AP Exam Score (All Exams)	None	61	1.82	0.55	0.07
	Low	67	1.98	0.52	0.06
	High	69	2.33	0.48	0.06
	Total	197	2.05	0.55	0.04
Percentage Scoring 3+ (All Exams)	None	61	0.22	0.20	0.03
	Low	67	0.26	0.22	0.03
	High	69	0.41	0.20	0.02
	Total	197	0.30	0.22	0.02

The results of the analyses indicated a statistically significant effect between groups for AP Exam (all exams) score, $F(2,194) = 16.82$, $p < .01$ indicating a statistically significant difference with respect to student performance across the different categories of previous school AP PD activity. An examination of the effect size of $\eta^2 = .15$ indicates that this effect is in the moderate range (Cohen, 1988). A set of post-hoc analyses using the Scheffe procedure indicated that significant differences were noted between the "high" PD category and both of the other two categories ("none" and "low"). Therefore, there were no significant differences with respect to AP scores between the "no activity" and "low activity" schools the following year. Only schools with a higher level of PD activity statistically differentiated themselves with respect to mean AP score the following year.

Similar to the findings for mean AP score, there was also a statistically significant difference between groups for student performance represented by the percentage of exams with scores of 3 or above across levels of AP PD, $F(2,194) = 15.89$, $p < .01$, $\eta^2 = .15$ indicating a significant difference with respect to student performance based on previous school AP PD activity. A set of post-hoc analyses using the Scheffe procedure indicated the same pattern of results presented for mean AP Exam score. Only schools with a higher level of PD activity statistically differentiated themselves with respect to the percentage of exams with AP Exam scores of 3 or higher.

A similar set of analyses were also performed on student AP outcomes for STEM-related courses. In these analyses only schools with five or more AP students and scores on at least five or more STEM exams were retained. The descriptive results are summarized in Table 2.

Table 2.

Mean Student AP Performance Outcomes on STEM Exams by Prior Year AP PD Participation

Outcome	AP PD Events	*n*	*Mean*	*SD*	*SE*
AP Exam Score (STEM)	None	29	1.71	0.73	0.14
	Low	41	1.80	0.65	0.10
	High	54	2.29	0.64	0.09
	Total	124	1.99	0.71	0.06
Percentage scoring 3+ (STEM)	None	29	0.20	0.25	0.05
	Low	41	0.22	0.23	0.04
	High	54	0.42	0.23	0.03
	Total	124	0.30	0.25	0.02

Similar to the results presented for all exams, there appears to be higher AP STEM exam performance as number of AP PD events increases for the school in the prior year. The between groups difference for STEM performance by mean score and mean percent scoring 3 or above were both statistically significant $F(2,121) = 9.65$, $p <= .01$, $\eta^2 = .14$ and $F(2,121) = 11.48$, $p <= .01$, $\eta^2 = .16$, respectively. A post-hoc analysis indicated the same pattern reported previously for all exams; statistically significant differences were seen only between the group representing the high number of PD events and the other two categories ("none" and "low") and no significant difference between the "none" and "low" PD activity groups.

The results presented so far seem to suggest an association between a highly active professional development environment and positive student performance outcomes. However, the results presented thus far only show the relation between teacher-activity levels in AP PD and student AP performance outcomes in isolation without accounting for the complexity of the educational environment that may also influence student exam performance. The dynamics inherent in any education system are varied and complex. In an attempt to address at least some aspect of this complexity, another set of analyses was performed to examine the role of AP PD in this system by accounting for some of the variables that have been shown to relate to student performance. The variables that were used in these analyses include (a) teacher experience (number of years teaching AP-level course work), SES (average household income), and school (level of AP activity) factors.

Before the regression models were run, each of the variables was checked to see if it satisfied the statistical assumptions underlying this form of analysis. Checks for normality, multicollinearity, and both univariate and multivariate outliers were performed for each independent variable (years teaching AP, household income, AP activity, and number of AP PD events) in the model. The results of these checks revealed moderate levels of skewness for all of the variables with the exception of household income. In order to correct for this lack of normality, a log-base-10 transformation was performed on each of the skewed independent variables.

A sequential regression analysis was undertaken in two steps. Teacher experience, parental income, and school AP activities were entered first. This was done to control for the effect of these variables on student AP performance. The next step in the model added an additional predictor (AP PD events) to the previous three. AP PD events was our independent variable of greatest interest in that we wanted to see if this variable could explain any student performance above and beyond that explained by the background (teacher, SES, and AP activity) variables. Therefore, any differences in the model between step 1 and step 2 were said to represent the influence of AP PD events above and beyond that of the background variables.

Of initial interest was whether the model tested was statistically significant. Table 3 presents the results of the regression model. The significance test for the first two steps of the model were both significant, with $F(3,131) = 3.87$, $p <= .01$ and $F(4,130) = 8.96$, $p <= .01$ for steps 1 and 2, respectively. Also of note was how much of the variance attributed to the dependent measure could be explained by the predictors. A measure of this is obtained in the multiple correlation coefficient (R^2). In this example the adjusted R^2 was reported, because it is generally regarded as a more conservative estimate as it takes into consideration the number of predictors and the sample size, which may artificially inflate the multiple correlation statistic. The initial step with background variables only produced an $R^2 = .06$, indicating that 6% of the variance of student AP mean score was accounted for by these variables. With the addition of the number of AP PD events the R^2 increased to .19, causing a change in R^2 of .13. All of these R^2 values including the change in R^2 were significant at the $p <= 0.01$ level of significance. This indicates that the number of AP PD events attended in the prior year significantly adds to the prediction of subsequent AP performance above and beyond the teacher, SES, and school effects used in this study.

Table 3.

Summary of Regression Parameters Predicting AP Exam Performance for All Exams

	Variable	*B*	*SE B*	β	*t*	*Sig (p)*
$R^2 = .06$						
Step 1	(Constant)	1.84	0.24		7.66	0.00
	Household Income	-0.01	0.02	-0.06	-0.69	0.49
	AP Activity	0.08	0.15	0.04	0.52	0.60
	Experience	0.63	0.20	0.26	3.14	0.00
$R^2 = .19$						
Step 2	(Constant)	1.27	0.25		5.02	0.00
	Household Income	0.01	0.02	0.04	0.45	0.65
	AP Activity	-0.16	0.15	-0.09	-1.08	0.28
	Experience	0.51	0.19	0.22	2.75	0.01
	AP PD Events	0.50	0.11	0.42	4.73	0.00

While discussion so far has focused on the model as a whole, also of note is the relative importance or role each of the independent variables has in predicting student outcomes. Table 3 provides a summary of these predictors and their relative contribution for explaining student mean performance for all AP subject areas. Because of the different scales associated with each of the predictor variables, standardized regression coefficients were evaluated (β in Table 3). Each β is displayed with its corresponding level of statistical significance. An inspection of this table indicates that two variables — "experience" and number of "AP PD events" — make statistically significant contributions to the explanation of student performance on the AP Exam in the subsequent year. The β for experience and AP PD of .22 and .42, respectively, also shed light on the relative importance of each of these predictors in the model. Although experience is a statistically significant factor, the level of AP PD in a school had a greater level of association with subsequent mean AP score while accounting for the previously mentioned teacher, SES, and school background effects in the model.

A second regression analysis was performed for student performance on AP Exams only in the STEM disciplines (Biology, Chemistry, Computer Science, Environmental Science, Calculus AB, Calculus BC, Physics B, Physics C: Electricity and Magnetism, Physics C: Mechanics, and

Statistics). For these analyses all predictors and AP PD participation variables were the same as before. The only modification to the previous model presented was with respect to the outcome measures (performance on all AP Exams was replaced by performance on only STEM exams).

The STEM model was initially tested for overall statistical significance. The significance tests for the first two steps of the model indicated that both were statistically significant, with $F(3,90) = 6.52$, $p <= .01$ and $F(4,89) = 11.22$, $p <= .01$ for steps 1 and 2, respectively. The initial step of the model, which included only the background variables (household income, AP activity, and teacher experience), resulted in an adjusted $R^2 = .15$. This indicated that 15% of the variance of student scores on AP STEM exams was accounted for by these background variables. With the addition of the number of AP PD events, the R^2 increased to .31, causing a change in R^2 of .16. All of these R^2 values, including the change in R^2, were significant at the $p <= .01$ level.

Each β was also tested for its level of statistical significance. Table 4 provides a summary of these predictors and their relative contribution to explaining student mean performance on AP STEM exams.

Table 4.

Summary of Regression Parameters Predicting AP Exam Performance for STEM Exams

	Variable	*B*	*SE B*	*β*	*t*	*sig*
$R^2 = .15$						
Step 1	(Constant)	1.54	0.38		4.01	0.00
	Household Income	-0.02	0.02	-0.06	-0.64	0.52
	AP Commitment	0.33	0.26	0.13	1.28	0.21
	Experience	1.26	0.32	0.38	3.93	0.00
$R^2 = .31$						
Step 2	(Constant)	0.74	0.39		1.90	0.06
	Household Income	0.01	0.02	0.05	0.50	0.62
	AP Commitment	-0.01	0.24	0.00	-0.04	0.97
	Experience	1.12	0.29	0.33	3.83	0.00
	AP PD Events	0.67	0.15	0.44	4.58	0.00

An inspection of this table indicates that the variables "experience" and "AP PD events" significantly contribute to an explanation of student performance on AP STEM exams in the subsequent year. The β for experience and AP PD of .33 and .44, respectively, are similar to the findings reported for all exams in that both were significant and AP PD had the greater weight. The main difference in this model is the increased importance of teacher experience in the model.

The regression results reported here using the mean grade for all exams and the mean grade for STEM exams as dependent variables were also replicated using the percentage of students scoring 3 or above and are reported in Appendixes A and B. The results for the percentage scoring 3 or above for both the "all exams" and "only STEM" models were consistent with those reported just for mean grade.

Conclusions

The results of this study provide some incremental evidence that a school culture that includes a significant engagement in professional development activities is associated with higher student performance. The model that was tested indicated that a school's level of AP PD activity can predict student outcomes above teacher experience and other factors, such as household income and a simple level of AP activity (percentage of students taking AP in the school). The influence of experience also seemed to play a significant role, and the effects seemed to increase in the STEM-related exams. However, the level of PD activity was still the most significant contributor. Given the unit of analysis and the inability to directly attribute student test scores to specific teachers, it is difficult to say for certain that the specific PD events were the cause, or whether the outcomes were unduly influenced by some artifact of a school culture with a robust professional development component. In addition, although the professional development and teacher-experience predictors in the model were significant, there was still a majority of the variance unaccounted for in the model, indicating that there is much more that could help inform our understanding of student performance.

Research in professional development is characterized by significant levels of variability over what works and what does not (Guskey & Yoon, 2009). However, the field is beginning to identify elements that generally seem to be indicative of positive PD outcomes. The variations in many of these studies are likely due to the complex nature of the environment where the intervention is taking place. This report highlighted some of this complexity and made an attempt to incorporate a certain level of it into the design. The education system in practice and the individuals who comprise it are significantly more complex. Any research in this area needs to appreciate this complexity and understand and incorporate it into further work.

Limitations

Given the previous discussion regarding the complexities inherent in teachers imparting knowledge gained through professional development to their students, it is unwise to draw too many inferential claims from these results. The grain size for the analysis is moderate (school level) and the sample was limited to a geographical region and affected by some limitations inherent in the data. Since the PD is not directly linked from teachers to students, it may be more appropriate to couch the results in terms of a culture of PD affecting student outcomes as opposed to any causal effect regarding the number of PD events and its impact on student performance. However, even with these limitations, the results do begin to address some of the complexities inherent in the educational process while pointing to some potential positive effects of PD and the influence of other factors such as experience.

Another factor in determining the effectiveness of a training program is an understanding of the program's level of implementation. Perceived program effectiveness can be influenced by both the degree and quality of this implementation. Unfortunately, implementation data were not available for this study. Understanding mediating factors such as level of support from administration, alignment with organizational goals, and level of collaboration with peers would provide a context for assessing the degree to which a program is realizing its stated goals. Ideally any evaluation of this sort would benefit from data that directly linked teachers engaged in PD activities to their students' subsequent performance over the course of several years, along with additional controls for confounding variables.

Future Work

Given the limitations of the study, there are several areas that can be addressed that would add to the rigor of the study. Further research could begin to unpack some of the relationships described in this study by increasing the specificity of the analysis to individual students and teachers and linking them together in the analysis. This would allow for greater specificity in terms of who attended the PD and the outcomes of the students they teach. Since the PD was ongoing, there would be some difficulty in producing a clear pre–post comparison but the use of a control group to draw comparisons may be more practical and would increase the rigor. Further research could also better address the climate within which learning takes place, leading to a more complete understanding of how strategies learned by teachers are implemented and what some of the barriers for this implementation may be in the classroom. The study also did not collect information on how any of the PD was implemented in the classroom. Subsequent work in this area would benefit from a greater understanding of the level of implementation and characterization of challenges that may confront this implementation.

Finally, any single study should not be viewed as providing conclusive evidence for any relationship under investigation. Rather, these results should be viewed as an additional source of incremental evidence toward a more complete understanding of an otherwise complex dynamic.

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Appendix A

Table A1.

Regression Results for Percentage Scoring 3+ (All AP Exams)

	Variable	*B*	*SE B*	β	*t*	*sig*
R^2 = .08						
Step 1	(Constant)	0.22	0.10		2.23	0.03
	Household Income	0.00	0.01	-0.01	-0.10	0.92
	AP Commitment	0.08	0.06	0.11	1.28	0.20
	Experience	0.29	0.08	0.29	3.50	0.00
R^2 = .20						
Step 2	(Constant)	-0.01	0.11		-0.08	0.93
	Household Income	0.01	0.01	0.08	1.04	0.30
	AP Commitment	-0.02	0.06	-0.02	-0.28	0.78
	Experience	0.25	0.08	0.25	3.15	0.00
	AP PD Events	0.20	0.04	0.40	4.60	0.00

Appendix B

Table B1.

Regression Results for Percentage Scoring 3+ on AP STEM Exams

	Variable	*B*	*SE B*	*β*	*t*	*sig*
R^2 = .15						
Step 1	(Constant)	0.07	0.14		0.51	0.61
	Household Income	0.00	0.01	-0.05	-0.48	0.63
	AP Commitment	0.08	0.09	0.08	0.84	0.40
	Experience	0.48	0.12	0.40	4.10	0.00
R^2 = .31						
Step 2	(Constant)	-0.23	0.14		-1.63	0.11
	Household Income	0.01	0.01	0.07	0.71	0.48
	AP Commitment	-0.05	0.09	-0.05	-0.54	0.59
	Experience	0.43	0.11	0.35	4.03	0.00
	AP PD Events	0.25	0.05	0.46	4.77	0.00

The Research & Development department actively supports the College Board's mission by:

- Providing data-based solutions to important educational problems and questions
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- Designing and evaluating improvements to current assessments and developing new assessments as well as educational tools to ensure the highest technical standards
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- Developing standards and conducting college and career readiness alignment studies
- Publishing findings and presenting our work at key scientific and education conferences
- Generating new knowledge and forward-thinking ideas with a highly trained and credentialed staff

Our work focuses on the following areas

Admission	Measurement
Alignment	Research
Evaluation	Trends
Fairness	Validity

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Attachment 4

Pre-AP Courses

Pre-AP®

Pre-AP English 1 English 2



Empowering Your Students' Growth

In Pre-AP® English courses, texts take center stage, inspiring and preparing all students for close, critical reading and analytical writing. Students examine how authors use specific words to affect the thoughts, emotions, and actions of readers and listeners. Students progress on their own writer's journey by first refining their approach to crafting complex, thought-provoking sentences, and then creating well-organized paragraphs and analytical essays.

Although both courses prioritize well-crafted texts and analytical writing, Pre-AP English 1 provides a foundation that's strengthened and extended in Pre-AP English 2. Beginning with an examination of key details in short fiction, Pre-AP English 1 moves to the study of pivotal words and phrases in poetry and drama, compelling evidence in nonfiction, and the techniques used by novelists to create powerful openings.

In Pre-AP English 2, students build on what they learned by examining how poets, playwrights, novelists, and writers of nonfiction use language to serve their unique purposes. Students' writing becomes more nuanced and sophisticated without losing sight of the importance of well-crafted sentences.

Challenges and Opportunities

Pre-AP English courses were designed in collaboration with educators nationwide to address the central curricular challenges they face every day. The research-supported course materials provide targeted and effective strategies educators can customize to meet students' specific needs. By addressing these challenges, Pre-AP empowers all students to learn, grow, and succeed, while building critical thinking skills for high school and beyond.

Pre-AP English courses provide focused time for students to engage with well-crafted texts.

Pre-AP English courses equip students with the skills to engage directly with a variety of literary and nonfiction texts. Students are encouraged to slow down to notice and enjoy rich texts that invite close reading and to first observe before analyzing and evaluating.

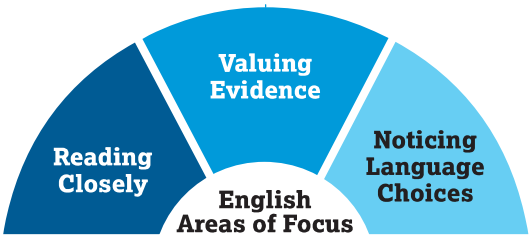
Pre-AP English courses help young writers build a foundation in evidence-based writing.

Pre-AP English courses infuse writing practice into daily work so students can internalize the habits of mind associated with analytical writing. Students learn to weigh options for evidence and to then embed that evidence seamlessly into their writing.

Pre-AP English courses emphasize the importance of language choices.

Pre-AP English courses guide students to investigate the meaning of words in context and to develop word consciousness—an awareness of the deliberate choices writers make when choosing one word over another.

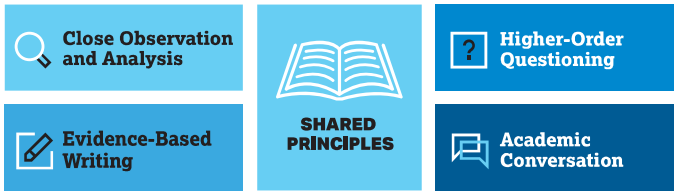
Pre-AP English Areas of Focus



The Pre-AP English areas of focus are English language arts practices that students develop as they engage with the course content. These areas of focus are vertically aligned to the disciplinary reasoning skills necessary for success in high school and beyond.

Pre-AP Shared Principles

The Pre-AP shared principles—a horizontal alignment across all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP English Course Model: Putting It All Together

Three essential Pre-AP course components: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress with both content and skills throughout the year.

Focused Course Framework

The Pre-AP English course framework focuses on a limited number of concepts and skills with the broadest relevance for high school coursework and college and career success.

Each Pre-AP English course contains four units of study that serve as an organizing frame for the model lessons and assessments for learning.

The Pre-AP English framework includes five Big Ideas:

- Engaging with Texts
- Constructing Texts
- Focusing on Language
- Investigating Through Research
- Entering the Conversation

Engaging Model Lessons

Pre-AP lessons help educators apply the framework, areas of focus, and shared principles to daily instruction.

Pre-AP English lessons feature:

- Rich, engaging, and carefully curated texts that offer a range of familiar and fresh voices, with an emphasis on contemporary, particularly original texts, or classics with timeless relevance.
- Scaffolded writing instruction that builds from the sentence to the paragraph to the page.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress isn't measured by performance on any single assessment. Rather, Pre-AP English courses offer a place to practice, to grow, and to recognize that learning takes time.

High-quality assessments include:

- 2 digital, multiple-choice, formative assessments per unit.
- 1 culminating performance task per unit.
- Question bank that allows teachers to select questions or craft their own to design quizzes.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where adaptations in instruction might be needed.

To learn more about Pre-AP English 1 and English 2 and other Pre-AP courses, visit: **preap.org**

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Pre-AP®

Pre-AP Algebra 1



Empowering Your Students' Growth

Pre-AP® Algebra 1 focuses on the foundational, grade-appropriate concepts and skills required for student growth and success in high school mathematics. Students gain a deep understanding of linear relationships through equations and functions. By mastering these building-block concepts in Pre-AP Algebra 1, they develop the necessary tools to tackle challenging mathematics through the rest of high school and beyond. The Pre-AP Algebra 1 course framework is focused and streamlined, devoting time and space for teachers to support students of any ability to progress toward expertise in important mathematics concepts and skills.

Addressing Inequities with Pre-AP Mathematics

The Pre-AP mathematics sequence of Algebra 1, Geometry with Statistics, and Algebra 2 is designed to create more equitable opportunities for students to take AP STEM courses, especially for those who are currently underrepresented in STEM courses and careers. By narrowing the scope of content across the three courses, it offers a strategic approach to mathematics that concentrates on the content and skills that matter most for college readiness. This intentional focus increases STEM readiness for a larger percentage of students, especially for courses such as AP Computer Science Principles, AP Precalculus, AP Statistics, and/or AP Calculus AB.

Challenges and Opportunities

Pre-AP Algebra 1 was designed in collaboration with educators nationwide to address the central challenges they face. The research-supported course materials provide targeted and effective strategies that educators can customize to meet students' specific needs. By addressing these challenges, Pre-AP empowers all students to learn, grow, and succeed, while building critical thinking skills for high school and beyond.

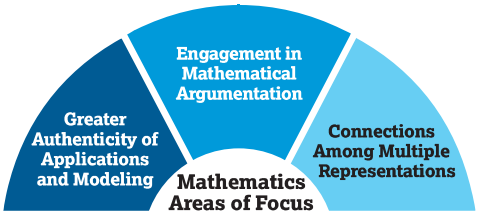
Pre-AP Algebra 1 is a course for all students.

Pre-AP Algebra 1 gives students ample time to synthesize foundational standards learned in middle school (such as proportions, plotting points, calculating slope, writing equations, and making tables of values) into a complete understanding of linear relationships and their practical applications. The progression of the course builds durable skills and a deep knowledge of the mathematical tools essential for success in mathematics and for life beyond school.

Pre-AP Algebra 1 optimizes students' readiness for college-level mathematics.

The modern world is shaped by advances in mathematics. Pre-AP Algebra 1 students explore real-world applications of linear, quadratic, and exponential functions. They use their understanding of these contexts to explain the world around them—from natural phenomena to the technology that connects our global community. By exploring problems and contexts that are relevant to their daily lives, students appreciate mathematics and build the critical thinking skills necessary to become true problem solvers.

Pre-AP Mathematics Areas of Focus



The Pre-AP mathematics areas of focus are math practices that students develop as they engage with the course content. These areas of focus are vertically aligned to the disciplinary reasoning skills necessary for success in high school and beyond.

Pre-AP Shared Principles

The Pre-AP shared principles—a horizontal alignment across all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP Algebra 1 Course Model: Putting It All Together

Three essential Pre-AP course components: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress with both content and skills throughout the year.

Focused Course Framework

The Pre-AP Algebra 1 course framework focuses on a limited number of concepts and skills with the broadest relevance for high school coursework and college and career success.

The framework defines what students should know and be able to do by the end of the course and organizes the year into four core units:

Unit 1: Linear Functions and Linear Equations

Unit 2: Systems of Linear Equations and Inequalities

Unit 3: Quadratic Functions

Unit 4: Exponent Properties and Exponential Functions

Engaging Model Lessons

Pre-AP lessons help educators apply the framework, areas of focus, and shared principles to daily instruction.

Pre-AP Algebra 1 lessons feature:

- Authentic, relevant, and engaging contexts enabling real-world applications.
- Disciplinary thinking skills of modeling and argumentation.
- Tasks that challenge students to think and value the mathematical process, building skills that serve them in school and in life.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress isn't measured by performance on any single assessment. Rather, Pre-AP Algebra 1 offers a place to practice, to grow, and to recognize that learning takes time.

High-quality assessments include:

- 2 digital, multiple-choice, technology-enhanced, formative assessments per unit.
- 1 or 2 practice performance tasks per unit and 1 culminating performance task per unit.
- Question bank that allows teachers to select questions or craft their own to design quizzes.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where adaptations in instruction might be needed.

To learn more about Pre-AP Algebra 1 and other Pre-AP courses, visit: **preap.org**

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Pre-AP®

Pre-AP Biology



Empowering Your Students' Growth

Pre-AP® Biology focuses on developing students' skills and knowledge through the study of four core units: ecological systems, evolution, cellular systems, and genetics. The course purposefully sequences the units of study from a macro-level understanding before focusing on the micro-level. Students begin exploring the workings of biological systems through an easily observable, macroscopic lens in ecology first because it's typically an accessible entry point for all students. Then, they apply this understanding of the interdependent nature of biological systems to better understand microscopic systems later in the course.

By engaging in science practices, through the Pre-AP science areas of focus, students increase their mastery of biological knowledge and strengthen cross-disciplinary reading, writing, and data-analysis skills. Students make meaningful connections among the structures, processes, and interactions that exist across biological systems—from cells to ecological communities. They analyze real-world phenomena and collaborate with peers in dialogue, investigations, and problem solving.

Challenges and Opportunities

Pre-AP Biology was designed in collaboration with educators nationwide to address the central curricular challenges they face every day in biology classrooms. The research-supported course frameworks provide targeted and effective strategies that educators can customize to meet students' specific needs. By addressing these challenges, Pre-AP empowers all students to learn, grow, and succeed, while building critical thinking skills for high school and beyond.

Pre-AP Biology courses engage students with relevant contextual problems to drive curiosity, observation, and analysis.

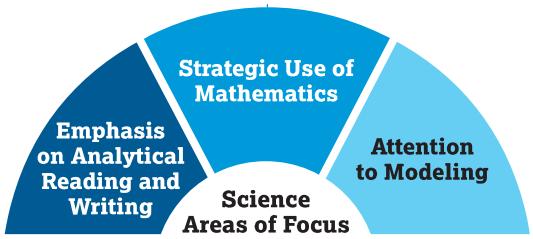
Pre-AP Biology asks students to think like scientists by deeply observing and analyzing complex living systems. Students learn to synthesize key content and apply scientific practices. This approach sparks students' curiosity about the living world around them and helps them make relevant connections to real-world applications and contexts in their lives.

Pre-AP Biology courses connect core ideas to drive deeper understanding of biological concepts.

Pre-AP Biology students must use and build upon prior knowledge of biology concepts to new scientific ideas strategically scaffolded throughout the course. This process helps students make meaningful connections. Pre-AP Biology instructional sequencing and design challenges students to develop a durable and coherent understanding of key biology concepts that prepares them for success in high school, as well as college science courses.

> "Those skills that students really need to excel on an SAT or on an AP Bio Exam … those skills are being asked of them in the 9th grade. Pre-AP prepares students not just for AP classes but also to be well-rounded students."
>
> —Demetrius, Pre-AP Biology Teacher

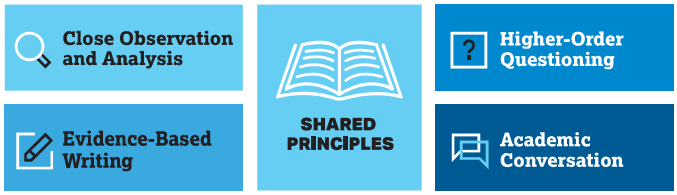
Pre-AP Science Areas of Focus



The Pre-AP science areas of focus are science practices that students develop as they engage with the course content. These areas of focus are vertically aligned to the disciplinary reasoning skills necessary for success in high school and beyond.

Pre-AP Shared Principles

The Pre-AP shared principles—a horizontal alignment across all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP Biology Course Model: Putting It All Together

Three essential Pre-AP course components: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress with both content and skills throughout the year.

Focused Course Framework

The Pre-AP Biology course framework focuses on a limited number of concepts and skills with the broadest relevance for high school coursework and college and career success.

The framework defines what students should know and be able to do by the end of the course and organizes the year into four core units:

Unit 1: Ecological Systems

Unit 2: Evolution

Unit 3: Cellular Systems

Unit 4: Genetics

Engaging Model Lessons

Pre-AP lessons help educators apply the framework, areas of focus, and shared principles to daily instruction.

Pre-AP Biology lessons feature:

- Authentic and engaging contexts enabling real-world applications.
- Disciplinary thinking skills of modeling and argumentation, making student thinking visible.
- Tasks that require students to do the thinking and value what they can DO, rather than just showing content facts they KNOW.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress isn't measured by performance on any single assessment. Rather, Pre-AP Biology offers a place to practice, to grow, and to recognize that learning takes time.

High-quality assessments include:

- 2 digital, multiple-choice, formative assessments per unit.
- 1 or 2 practice performance tasks per unit and 1 culminating performance task per unit.
- Question bank that allows teachers to select questions or craft their own to design quizzes.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where adaptations in instruction might be needed.

To learn more about Pre-AP Biology and other Pre-AP courses, visit: **preap.org**

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Pre-AP®

Pre-AP Chemistry



Empowering Your Students' Growth

The Pre-AP® Chemistry course is designed to leave students with a deep—and lasting—understanding of the nature of matter at the molecular level. The course starts by engaging students in analyzing properties of matter that are observable and measurable. This not only sparks their interest in chemistry but also provides a better foundation from which to build deeper understanding as students explore properties of molecules and atoms. By the end of the course, students will see how a particle view of matter can explain the phenomena under study and be used to make predictions about matter.

Pre-AP Chemistry motivates students to be active participants as they engage in critical thinking and strategically apply mathematical skills through data analysis, modeling, and productive collaboration with their peers.

Challenges and Opportunities

Pre-AP Chemistry was designed in collaboration with educators nationwide to address the central curricular challenges they face every day in chemistry. The research-supported course materials provide targeted and effective strategies that educators can customize to meet students' specific needs. By addressing these challenges, Pre-AP empowers all students to learn, grow, and succeed, while building critical thinking skills for high school and beyond.

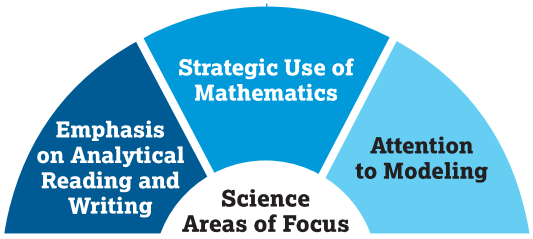
Pre-AP Chemistry provides students with opportunities to develop a deep, coherent conceptual understanding of matter at the molecular level by moving strategically from macroscopic to atomic explorations of the properties of matter.

Many introductory chemistry courses are conceptually organized in a manner that results in students having few opportunities to appropriately scaffold their understanding of the particle nature of matter. Without this deeper, coherent understanding of matter, students may not be adequately prepared to tackle the more advanced concepts of matter and energy. To address this challenge, Pre-AP Chemistry starts with macroscopic properties of everyday materials and progresses throughout the course to the study of increasingly deeper and more detailed perspectives.

Pre-AP Chemistry prioritizes opportunities to use context-driven mathematics, across multiple representations, to establish connections between quantitative and conceptual understandings.

Introductory chemistry courses often use mathematics without context-focused applications, and students may be able to solve problems but lack understanding of the underlying chemical principles. To avoid this challenge, Pre-AP Chemistry doesn't ask students to demonstrate their knowledge only by mathematical problem solving. Pre-AP Chemistry's first unit, with its focus on observable properties of matter, allows for a context-focused introduction of the mathematical skills that will be necessary throughout the course.

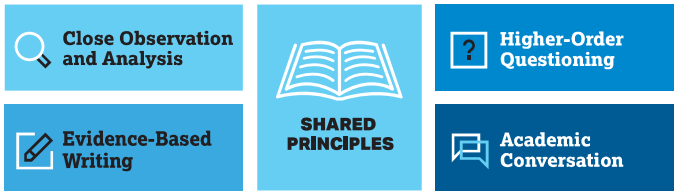
Pre-AP Science Areas of Focus



The Pre-AP science areas of focus are science practices that students develop as they engage with the course content. These areas of focus are vertically aligned to the disciplinary reasoning skills necessary for success in high school and beyond.

Pre-AP Shared Principles

The Pre-AP shared principles—a horizontal alignment across all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP Chemistry Course Model: Putting It All Together

Three essential Pre-AP course components: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress with both content and skills throughout the year.

Focused Course Framework

The Pre-AP Chemistry course framework focuses on a limited number of concepts and skills with the broadest relevance for high school coursework and college and career success.

The framework defines what students should know and be able to do by the end of the course and organizes the year into four core units:

Unit 1: Particle View of Matter

Unit 2: Particle Interactions

Unit 3: Chemical Quantities

Unit 4: Chemical Transformations

Engaging Model Lessons

Pre-AP lessons help educators apply the framework, areas of focus, and shared principles to daily instruction.

Pre-AP Chemistry lessons feature:

- Analysis of authentic and engaging contexts enabling real-world applications.
- Disciplinary reasoning tools of strategically using mathematics, modeling, and scientific argumentation.
- Tasks that require students to do the thinking and value what they can DO, rather than just showing content facts they KNOW.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress isn't measured by performance on any single assessment. Rather, Pre-AP Chemistry offers a place to practice, to grow, and to recognize that learning takes time.

High-quality assessments include:

- 2 digital, multiple-choice, technology-enhanced, formative assessments per unit.
- 1 practice performance task per unit and 1 culminating performance task per unit.
- Question bank that allows teachers to select questions or craft their own to design quizzes.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where instructional adaptions might be needed.

To learn more about Pre-AP Chemistry and other Pre-AP courses, visit: **preap.org**

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Pre-AP®

Pre-AP Geometry with Statistics



Empowering Your Students' Growth

The Pre-AP® Geometry with Statistics course has a central focus on measurement as it promotes compelling questions about what a measure is, what we measure, how to measure, and when measurements do or don't change. It invites the use of inherently authentic problems to frame important mathematical concepts because measurement is a fundamental tool we use to understand and interpret the world. Finally, this course's focus on measurement establishes a conceptual bridge between the topics in the geometry units and those in the statistics and probability unit.

Addressing Inequities with Pre-AP Mathematics

The Pre-AP mathematics sequence of Algebra 1, Geometry with Statistics, and Algebra 2 is designed to create more equitable opportunities for students to take AP STEM courses, especially for those who are currently underrepresented in STEM courses and careers. By narrowing the scope of content across the three courses, it offers a strategic approach to mathematics that concentrates on the content and skills that matter most for college readiness. This intentional focus increases STEM readiness for a larger percentage of students, especially for courses such as AP Computer Science Principles, AP Precalculus, AP Statistics, and/or AP Calculus AB.

Challenges and Opportunities

Pre-AP Geometry with Statistics was designed in collaboration with educators nationwide to address the central curricular challenges they face. The research-supported course materials provide targeted and effective strategies that educators can customize to meet students' specific needs. By addressing these challenges, Pre-AP empowers all students to learn, grow, and succeed, while building critical thinking skills for high school and beyond.

Pre-AP Geometry with Statistics provides opportunities to examine problems that can be solved using both algebraic and geometric approaches.

Pre-AP Geometry with Statistics provides students with a meaningful conceptual bridge between algebraic and geometric problem-solving methods, which deepens their understanding of the utility of mathematics.

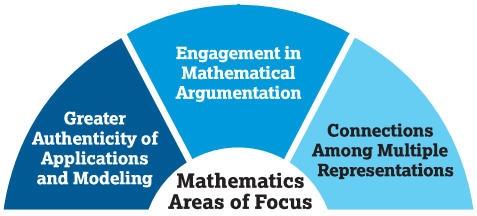
Pre-AP Geometry with Statistics provides opportunities to strategically leverage transformations.

Pre-AP Geometry with Statistics provides a strong focus on strategically leveraging transformations to deepen students' understanding of similarity and congruence. Also, transformations are used to broaden students' understanding of functions.

Pre-AP Geometry with Statistics provides a consolidated, deeper exploration of probability and statistics.

Pre-AP Geometry with Statistics provides students with an opportunity for sustained and focused examination of topics that are essential for quantitative literacy, and it helps students develop a deep understanding and appreciation of statistical and probabilistic reasoning.

Pre-AP Mathematics Areas of Focus



The Pre-AP mathematics areas of focus are math practices that students develop as they engage with the course content. These areas of focus are vertically aligned to the disciplinary reasoning skills necessary for success in high school and beyond.

Pre-AP Shared Principles

The Pre-AP shared principles—a horizontal alignment across all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP Geometry with Statistics Course Model: Putting It All Together

Three essential Pre-AP course components: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress with both content and skills throughout the year.

Focused Course Framework

The Pre-AP Geometry with Statistics course framework focuses on a limited number of concepts and skills with the broadest relevance for high school coursework and college and career success.

The framework defines what students should know and be able to do by the end of the course and organizes the year into four core units:

Unit 1: Measurement in Data

Unit 2: Tools and Techniques of Geometric Measurement

Unit 3: Measurement in Congruent and Similar Figures

Unit 4: Measurement in Two and Three Dimensions

Engaging Model Lessons

Pre-AP lessons help educators apply the framework, areas of focus, and shared principles to daily instruction.

Pre-AP Geometry with Statistics lessons feature:

- Authentic, relevant, and engaging contexts enabling real-world applications.
- Disciplinary reasoning tools that focus on multiple representations, modeling, and argumentation, which make student thinking visible.
- Tasks that challenge students to think and value the mathematical process, building skills that serve them in school and in life.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress isn't measured by performance on any single assessment. Rather, Pre-AP Geometry with Statistics offers a place to practice, to grow, and to recognize that learning takes time.

High-quality assessments include:

- 2 digital, multiple-choice, formative assessments per unit.
- 1 practice performance task per unit and 1 performance task per unit.
- Question bank that allows teachers to select questions or craft their own to design quizzes.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where adaptations in instruction might be needed.

To learn more about Pre-AP Geometry with Statistics and other Pre-AP courses, visit: **preap.org**

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Pre-AP®

Pre-AP Algebra 2



Empowering Your Students' Growth

The Pre-AP® Algebra 2 course capitalizes on, solidifies, and extends the conceptual understanding and procedural fluency of functions and data analysis that students developed in prior courses. They build upon linear, quadratic, and exponential functions as they work to define logarithmic, polynomial, rational, square root, and trigonometric functions. Quantitative literacy is developed by weaving data sets, contextual scenarios, and mathematical modeling throughout the course. Students are able to make sense of many real-world scenarios because of their increased toolbox of functions. These skills make students critical consumers of the day-to-day mathematics that surrounds them, as well as prepare them for subsequent coursework in mathematics and the sciences.

Addressing Inequities with Pre-AP Mathematics

The Pre-AP mathematics sequence of Algebra 1, Geometry with Statistics, and Algebra 2 is designed to create more equitable opportunities for students to take AP® STEM courses, especially for those who are currently underrepresented in STEM courses and careers. By narrowing the scope of content across the three courses, it offers a strategic approach to mathematics that concentrates on the content and skills that matter most for college readiness. This intentional focus increases STEM readiness for a larger percentage of students, especially for courses such as AP Computer Science Principles, AP Precalculus, AP Statistics, and/or AP Calculus AB.

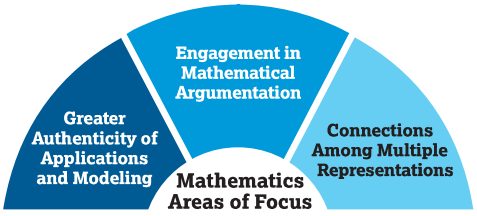
Challenges and Opportunities

Pre-AP Algebra 2 was designed in collaboration with educators nationwide to address the central challenges they face. The research-supported course materials provide targeted and effective strategies that educators can customize to meet students' specific needs. By addressing these challenges, Pre-AP empowers all students to learn, grow, and succeed, while building critical thinking skills for high school and beyond.

Pre-AP Algebra 2 is a course for all students.
Many traditional Algebra 2 courses prioritize unnecessary symbolic manipulation and arcane topics with little relevance to students' lives. Not everyone will leave high school intending to become engineers, scientists, or mathematicians, but all students benefit from working collaboratively to solve cognitively demanding problems. Pre-AP Algebra 2 accomplishes this goal through a focus on authentic applications, increased focus on prioritized content, and increased emphasis on bivariate data analysis.

Pre-AP Algebra 2 optimizes students' readiness for college-level mathematics.
Every student who successfully completes the course must have several choices available to them, including progressing to a college-level statistics or calculus course. It could mean choosing to hone their skills in a college algebra or mathematical modeling course before tackling AP Precalculus, AP Calculus, or AP statistics. Pre-AP Algebra 2 also creates opportunities for students to take college-level science classes that require a basic working understanding of trigonometry. Regardless of an individual student's path, Pre-AP Algebra 2 serves their needs by engaging them in authentic mathematical experiences.

Pre-AP Mathematics Areas of Focus



The Pre-AP mathematics areas of focus are math practices that students develop as they engage with the course content. These areas of focus are vertically aligned to the disciplinary reasoning skills necessary for success in high school and beyond.

Pre-AP Shared Principles

The Pre-AP shared principles—a horizontal alignment across all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP Algebra 2 Course Model: Putting It All Together

Three essential Pre-AP course components: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress with both content and skills throughout the year.

Focused Course Framework

The Pre-AP Algebra 2 course framework focuses on a limited number of concepts and skills with the broadest relevance for high school coursework and college and career success.

The framework defines what students should know and be able to do by the end of the course and organizes the year into four core units:

Unit 1: Modeling with Functions

Unit 2: The Algebra of Functions

Unit 3: Function Families

Unit 4T: Trigonometric Functions

Unit 4M: Matrices and Their Applications

Schools can chose one of the two available fourth units based on the best alignment to their state and local standards.

Engaging Model Lessons

Pre-AP lessons help educators apply the framework, areas of focus, and shared principles to daily instruction.

Pre-AP Algebra 2 lessons feature:

- Authentic, relevant, and engaging contexts enabling real-world applications.
- Disciplinary reasoning tools that focus on multiple representations, mathematical modeling, and argumentation, which make student thinking visible.
- Tasks that challenge students to think and value the mathematical process, building skills that serve them in school and in life.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress isn't measured by performance on any single assessment. Rather, Pre-AP Algebra 2 offers a place to practice, to grow, and to recognize that learning takes time.

High-quality assessments include:

- 2 digital, multiple-choice, formative assessments per unit.
- 1 practice performance task per unit and 1 culminating performance task per unit.
- Question bank that allows teachers to select questions or craft their own to design quizzes.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where adaptations in instruction might be needed.

To learn more about Pre-AP Algebra 2 and other Pre-AP courses, visit: **preap.org**

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Pre-AP®

Pre-AP World History and Geography



Empowering Your Students' Growth

Pre-AP® World History and Geography focuses on building the disciplinary skills of contextualization, causation,comparison, continuity and change over time. The course framework encourages students to use the tools of the historian and geographer on a regular basis: sources, data, maps, and evidence-based inquiry. Primary and secondary sources, paired with investigative questions, develop historical thinking skills and learning key concepts that shape our understanding of world history and geography.

> "At the beginning of the year, not many students ask questions. They're still nervous. After a few months of Pre-AP, they're beginning to get the confidence to ask questions in a way that they never have before."
>
> —**Matthew**, Pre-AP World History and Geography Teacher

Challenges and Opportunities

Pre-AP World History and Geography was designed in collaboration with educators nationwide to address the central curricular challenges they face every day in their classrooms. The research-tested course materials provide targeted and effective strategies educators can customize to meet students' specific needs. Pre-AP empowers all students to learn, grow, and succeed, building critical thinking skills they need for high school and beyond.

PRE-AP WORLD HISTORY AND GEOGRAPHY courses utilize high-quality sources to guide students toward evidence-based discoveries.

Pre-AP World History and Geography allows students to encounter a wide range of primary and secondary sources as they regularly practice discovering, analyzing, and weighing evidence. Often, students have too few opportunities to interact directly with sources. In this course, students become inquisitive investigators who use the tools of the discipline to uncover and interpret new evidence about the world and its inhabitants.

PRE-AP WORLD HISTORY AND GEOGRAPHY courses allow students to make connections across time and space.

Pre-AP World History and Geography allows students to identify connections within geographic and historical relationships across time and space. They practice contextualization, causation, comparison, continuity and change over time. By allowing teachers and students to slow down and focus, students can strengthen and flex these social studies skills to evaluate historical and geographic relationships.

PRE-AP WORLD HISTORY AND GEOGRAPHYcourses support students to develop evidence-based arguments.

Pre-AP World History and Geography includes regular, purpose-driven writing practice that sharpens students' argumentation skills. Students discover that claims require accurate, appropriate evidence, and they reinforce these skills through regular practice of purpose-driven writing exercises.

World History and Geography Areas of Focus



Each Pre-AP course is focused on three instructional priorities that are central to meaningful learning and student engagement in that discipline. They represent the reasoning skills that students need to develop and strengthen in history and social sciences.

Pre-AP Shared Principles

The Pre-AP shared principles—a defining touchstone of all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP World History and Geography Course Model

Three essential Pre-AP course ingredients: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These instructional resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress and growth throughout the year.

Focused Course Framework

The Pre-AP World History and Geography course framework creates time and space for deep learning.

The framework defines what students should know and be able to do by the end of the course and is organized by seven units: one geography unit to open the year and six units based on historical periods. Schools have flexibility to select the pathway of units that best aligns to their district course sequence and state standards.

Engaging Model Lessons

Pre-AP lessons help educators apply the Framework, Areas of Focus, and Shared Principles to daily instruction.

- Sources are central to the model lessons, allowing students to interact regularly with accessible, authentic textual excerpts as well as images, maps, and charts.
- The course challenges students to investigate, collaborate, and debate ideas—skills to build and retain content knowledge while acquiring confidence and self-discipline.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress is not measured by performance on any single assessment. Rather, Pre-AP World History and Geography assessments offers a place to practice, to grow, and to recognize that learning takes time.

High-quality resources include:

- Two digital, multiple-choice, formative assessments per unit
- One culminating performance task per unit
- Question bank that allows teachers to select questions or craft their own to design quizzes.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where adaptations in instruction might be needed.

For more about Pre-AP World History and Geography and other Pre-AP courses, visit: **preap.org**

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CollegeBoard Pre-AP®

Pre-AP Arts



Empowering Your Students' Growth

Expression and creativity are key to building critical thinking skills in high school. To increase students' access to high-quality arts instruction, College Board has carefully cultivated four arts courses—dance, music, theatre, and visual arts—as part of the suite of Pre-AP® courses. In each arts course, students are guided to observe and interpret, practice and experiment, research and make, reflect and evaluate, and revise and share. Students grow in their appreciation for the creative process, as well as through their final products and performances.

Challenges and Opportunities

Pre-AP Arts courses were designed in collaboration with educators nationwide to address the central curricular challenges they face every day. The research-supported course materials provide targeted and effective strategies educators can customize to meet students' specific needs. By addressing these challenges, Pre-AP empowers all students to learn, grow, and succeed, while building critical thinking skills for high school and beyond.

Pre-AP Arts courses are designed with flexibility for universal implementation.

Pre-AP Arts courses are adaptable so educators can implement instructional lessons in different settings. This allows schools to make the best use of their available resources. The Pre-AP Arts approach complements the already-existing, performance-focused courses in your school, while providing resources to incorporate the core Pre-AP practices throughout the curriculum.

Pre-AP Arts courses focus on the creative process—not just the final product or performance.

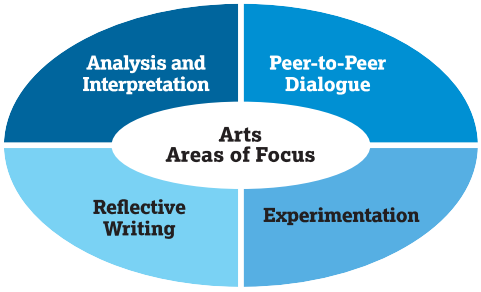
Pre-AP Arts courses challenge students to take a deliberate and critical analysis of their own creative processes. Students take the time to generate and refine ideas, practice skills and techniques, reflect, revise approaches, and collaborate with their peers. Pre-AP Arts courses build confidence as students learn to value the creative process and hone new techniques and skills in their journey of self-expression.

Pre-AP Arts courses employ authentic and relevant assessments.

Pre-AP Arts assessments motivate students to refine and revise their creative work. Students are challenged to analyze, critique, and communicate about their creative process, final product, and technical skill development. These assessments flow seamlessly from the creative work itself, making assessments a relevant, valuable, and meaningful tool for students and educators alike.

> "Even the students who had absolutely no dance experience were able to incorporate dance movement that we had taught prior into a new context."
>
> —Pre-AP Arts Teacher, Florida High School

Pre-AP Arts Areas of Focus



Pre-AP Arts courses are built on four foundational instructional priorities for meaningful learning and student engagement. The areas of focus are vertically aligned to practices embedded in high school and college arts courses, including AP®.

Pre-AP Shared Principles

The Pre-AP shared principles—a horizontal alignment across all Pre-AP courses—are a set of research-supported instructional principles and practices that build important cross-disciplinary skills and foster cross-curricular alignment in a school. These four principles create a common instructional focus for both students and educators.



The Pre-AP Arts Course Model: Putting It All Together

Three essential Pre-AP course components: (1) a focused course framework, (2) engaging model lessons, and (3) assessments for learning. These resources help educators plan their year, deliver rigorous grade-level appropriate instruction, and monitor student progress throughout the year.

Focused Course Framework

The Pre-AP Arts framework focuses on a limited number of concepts and skills with the broadest relevance for high school coursework and college and career success.

The framework defines what students should know and be able to do and is unified by five Big Ideas:

- Observe and Interpret
- Practice and Experiment
- Research and Make
- Reflect and Evaluate
- Revise and Share

Engaging Model Lessons

Pre-AP lessons help educators apply the framework, areas of focus, and shared principles to daily instruction.

Pre-AP Arts lesson highlights:

- The arts courses offer instructional modules. These units of study can be flexibly integrated into a school's existing arts course.
- All arts courses feature a wide range of engaging and contemporary anchor works, and the lessons elevate the creative process. This builds student interest and confidence.

Assessments for Learning

Pre-AP assessments function as a component of the teaching and learning cycle. Progress isn't measured by performance on any single assessment. Rather, Pre-AP Arts courses offer a place to practice, to grow, and to recognize that learning takes time.

The high-quality assessments:

- Include 1 authentic performance-based assessment per module.
- Are embedded in instructional practice, honing technical skill as well as revision and reflection.

These assessments serve as valuable tools for educators and students to gauge understanding and to determine where adaptations in instruction might be needed.

To learn more about Pre-AP Arts and other Pre-AP courses, visit: **preap.org**

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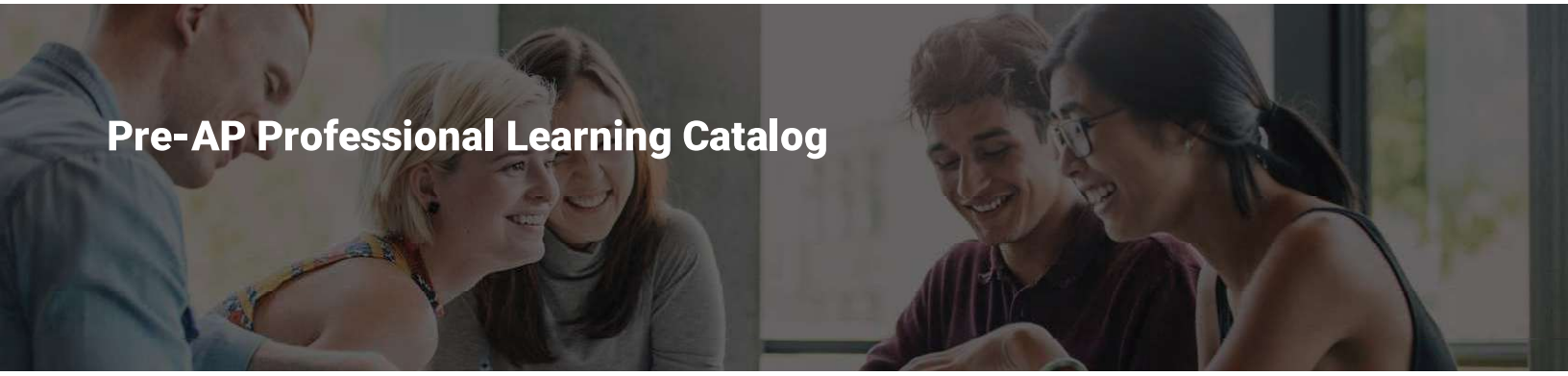
Attachment 5

Pre-AP Professional Learning



Pre-AP Professional Learning Catalog

- Pre-AP Professional Learning Catalog: Introduction
- Building Readiness for All Educators
- Building the Foundation for Teachers New to Pre-AP Courses
- Building the Foundation for Leaders New to Pre-AP Courses
- Building Expertise for Educators Experienced with Pre-AP Courses
- Ordering
- Resource Library

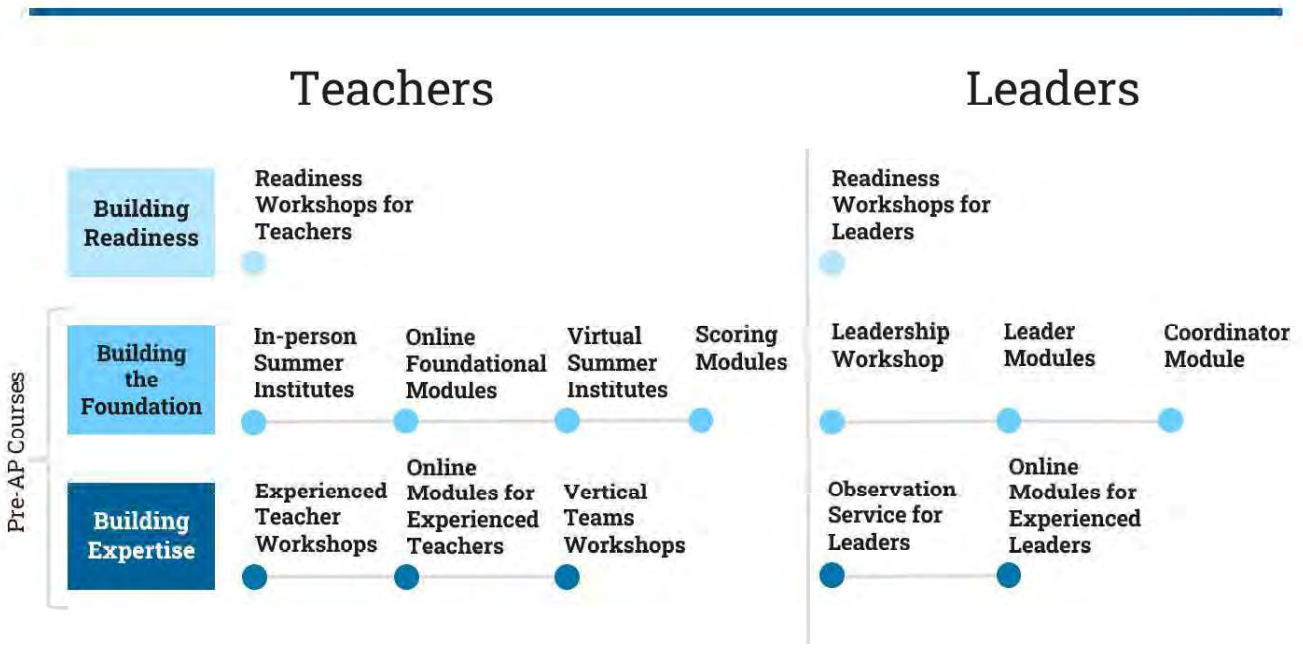
Pre-AP Professional Learning Catalog: Introduction

Welcome to the Pre-AP Professional Learning Catalog

Pre-AP offers a wide range of professional learning opportunities customized for your role and level of experience with the Pre-AP Program.

Here you'll get an overview of the Pre-AP Professional Learning services.

Use the menu or the Continue bar at the bottom of each page to explore our services according to your role and experience with the program.



Why Pre-AP Professional Learning?



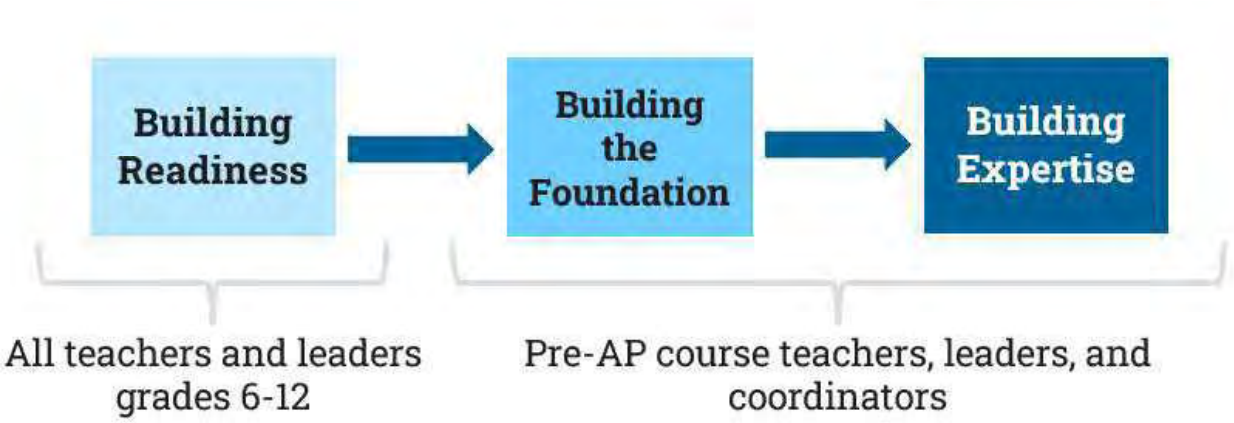
It's a catalyst for Pre-AP success.

Pre-AP Professional Learning aligns with best practices in adult learning theory. At the core of our services is the mission to increase equity and access for all students.

Our participants work through objectives that are engaging, active, and easily transferable into classroom practices. Educator expertise is respected and expanded by prioritizing collaboration with diverse colleagues and promoting sharing, application, and reflection. Participants are given space to plan and apply strategies to their own classrooms and circumstances.

We offer ongoing, multiyear support.

Pre-AP offers a range of professional learning opportunities customized for your role and level of experience with the Pre-AP Program:



1. **Building Readiness.** **Created for *all* teachers and leaders of grades 6—12,** these workshops introduce the design and pedagogy of the Pre-AP Program—empowering participants to apply Pre-AP principles to their own content, grade level, and school.

2. **Building the Foundation.** **Created for teachers, leaders, and coordinators *new* to Pre-AP courses.** Institutes and modules introduce course teachers, leaders, and coordinators to the Pre-AP Approach to Teaching and Learning and prepare them to start building courses at their schools.

3. **Building Expertise.** **Created for *experienced* Pre-AP course teachers and leaders who teach or lead Pre-AP courses and have completed foundational professional learning.** Focused workshops, modules, and observations develop educators' expertise in best classroom practices that

support the needs of all students on the road to achieving their goals in Pre-AP and beyond.

Professional Learning Recommended Pathway

	When	Who	What
Building Readiness	Ongoing	Any teacher 6-12	Pre-AP Readiness Workshops
	Prior to Course Implementation	Future Pre-AP course teachers	Pre-AP Readiness Workshops
Building the Foundation	Summer	Pre-AP course teachers	Pre-AP Summer Institutes
	Ongoing	Pre-AP course teachers	Online Foundational Learning Modules Online Scoring Modules
Building Expertise	Ongoing	Pre-AP course teachers	Experienced Teacher Workshop or Online Experienced Teacher Modules
	Ongoing	Pre-AP and AP course teachers	Vertical Team Workshops

You'll work with expert Pre-AP National Faculty.

National Faculty members facilitate professional learning experiences. Faculty who lead course teacher experiences are College Board–endorsed teachers who teach Pre-AP courses and have detailed knowledge of the program. National Faculty who lead readiness experiences are fully committed to the mission of College Board and goals of the Pre-AP Program. Facilitators for leader services are both practicing Pre-AP leaders and implementation directors. All National Faculty members are veteran educators.






The experience is endorsed by teachers and leaders.

Whether virtual or in person, Pre-AP teachers and leaders report that their professional learning is helpful, informative, and engaging.

Use the flash cards to read what educators have shared about their experiences with our professional learning services.

Arts Readiness:
Documenting Thinking and Creating

"It was wonderful to be able to collaborate and plan with my colleagues all the informative strategies acquired in this course. We learned additional ways to liven up and strengthen our lesson plans for the achievement of all students."

— Art Teacher, Massachusetts

ELA Readiness:
Texts Take Center Stage

"The information given in this workshop is applicable anywhere in education, so I was excited to be able to apply this to any lesson, not just certain texts."

— English Teacher, Wyoming

Experienced Leader:
Observation Service

"Our directors were AMAZING!"

Math Readiness:
Using Higher-Order Questioning to Support Conceptual Understanding

"I was very impressed. [My facilitator] was great and I was pleasantly surprised with how informative the session was and how many strategies I gained."

— Math Teacher, Virginia

Science Readiness:
Building Conceptual Understanding Using Analytical Reading and Writing

"Excellent course—useful, informative, clear! A pleasure to learn and be reminded of strategies to help students learn!"

— Science Teacher, New York

Social Studies Readiness:
Fostering Disciplinary Skills

"I can see great value incorporating these principles and strategies in my classroom."

— History Teacher, Georgia

Pre-AP Summer Institute:
Algebra 1

"I wish all professional development courses were this good and useful!"

— Pre-AP Algebra 1 Teacher, Texas

Pre-AP Summer Institute:
English 1

"[My facilitator] made me feel an excitement for teaching that I was a little apprehensive about. Her level of knowledge and the resources she provided were extremely beneficial."

— Pre-AP English 1 Teacher, Georgia

World Language and Culture Readiness:
Applying Pre-AP Shared Principles

"The guidance and support through the training was great. Moderator was clear and gave several opportunities to apply the learned material and to discuss main topics."

— Spanish Teacher, Delaware

Private Pre-AP Professional Learning Order Form

Complete the form to order a private teacher or leader service, or request a quote for your school or district.

PRIVATE ORDER

Public Pre-AP Course Professional Learning Registration

Peruse the calendar for public teacher and leader events and register for a service.

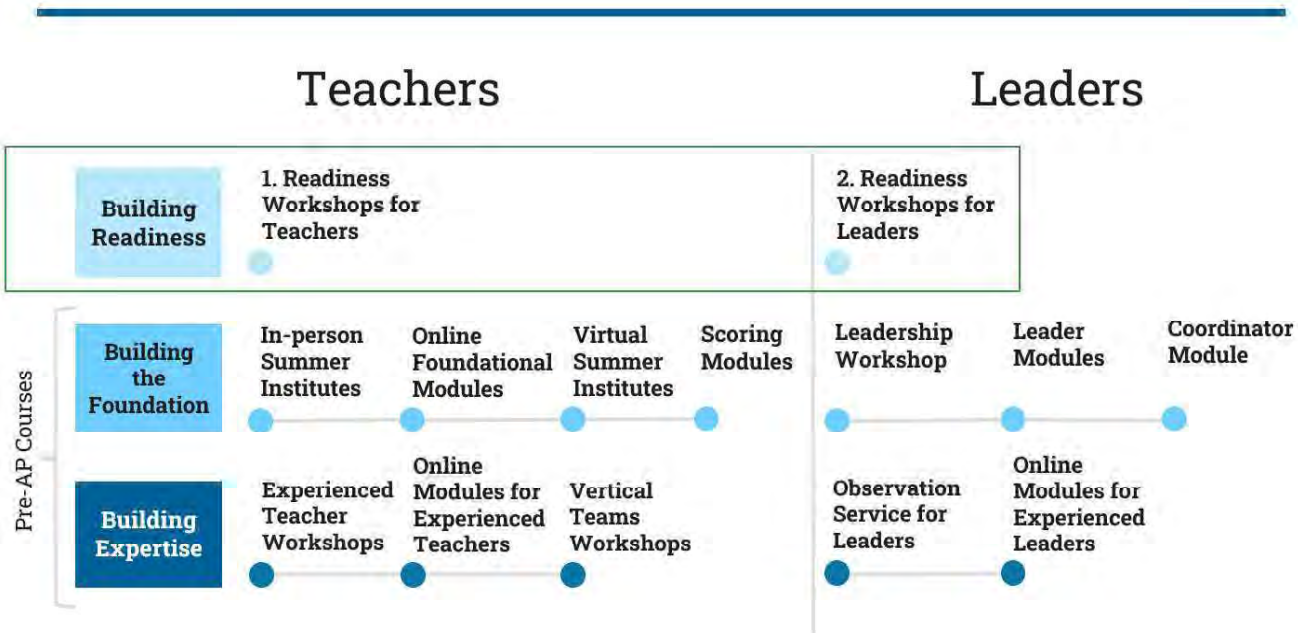
PUBLIC CALENDAR

CONTINUE TO BUILDING READINESS FOR ALL EDUCATORS

Building Readiness for All Educators

Pre-AP Professional Learning: Building Readiness

Created for ***all* teachers and leaders of grades 6—12**, these workshops introduce the design and pedagogy of the Pre-AP Program.



1. Readiness Workshops for Teachers





Purpose

Pre-AP Readiness Workshops were created for educators of grades 6—12 who are interested in Pre-AP but not quite ready to implement the full program. These workshops introduce the design and pedagogy of the Pre-AP Program and empower participants to apply Pre-AP principles to their own content and grade level.

Objectives

- Examine the Pre-AP mission of equity and access for all students.
- Explore Pre-AP shared principles and disciplinary areas of focus.
- Experience and analyze model lessons from Pre-AP instructional resources.
- Collaborate to design classroom activities that build readiness and meet the needs of all learners.

Pre-AP Readiness Workshop Offerings

Use the plus sign (+) to learn more about the Pre-AP Readiness Workshops available in each discipline, including the titles, foci, objectives, and sample agendas.

English Language Arts

Texts Take Center Stage

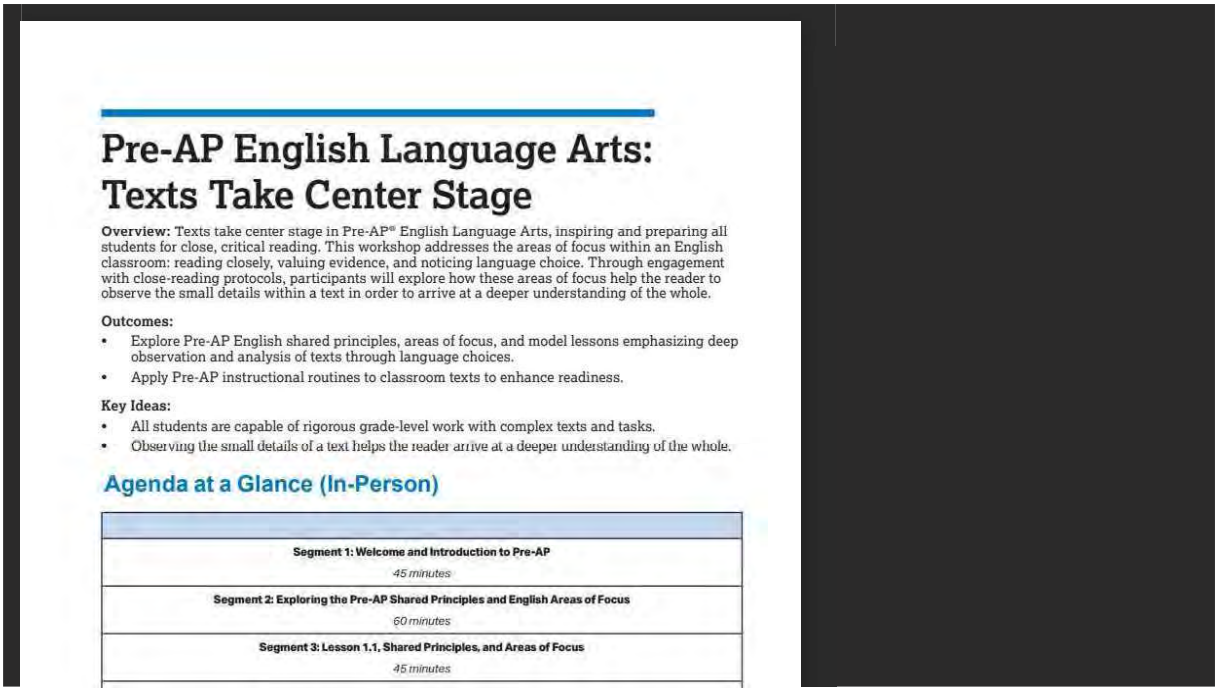
Focus: Concentrating on three key areas of Pre-AP English—reading closely, valuing evidence, and noticing language choices—participants will:

- Explore Pre-AP English 1 model lessons focusing on deep observation and analysis of texts across multiple genres.
- Collaborate and design in-person and virtual classroom activities featuring Pre-AP shared principles and English areas of focus.

From Sentence to Synthesis

Focus: Focusing on the crafting of complex sentences as a foundation for complex thinking and communicating ideas clearly, participants will:

- Examine foundational writing techniques, specifically at the sentence and paragraph level, that enable students to comprehend text and incorporate textual evidence.
- Collaborate to design classroom activities featuring sentence-level writing strategies.



Pre-AP English Language Arts: Texts Take Center Stage

Overview: Texts take center stage in Pre-AP® English Language Arts, inspiring and preparing all students for close, critical reading. This workshop addresses the areas of focus within an English classroom: reading closely, valuing evidence, and noticing language choice. Through engagement with close-reading protocols, participants will explore how these areas of focus help the reader to observe the small details within a text in order to arrive at a deeper understanding of the whole.

Outcomes:

- Explore Pre-AP English shared principles, areas of focus, and model lessons emphasizing deep observation and analysis of texts through language choices.
- Apply Pre-AP instructional routines to classroom texts to enhance readiness.

Key Ideas:

- All students are capable of rigorous grade-level work with complex texts and tasks.
- Observing the small details of a text helps the reader arrive at a deeper understanding of the whole.

Agenda at a Glance (In-Person)

Segment 1: Welcome and Introduction to Pre-AP *45 minutes*
Segment 2: Exploring the Pre-AP Shared Principles and English Areas of Focus *60 minutes*
Segment 3: Lesson 1.1, Shared Principles, and Areas of Focus *45 minutes*

Math

Developing Mathematical Knowledge Within a Learner-Centered Classroom

Focus: Examining an engaging, learner-centered mathematics classroom through the lens of the Pre-AP shared principles and mathematics areas of focus—close observation and analysis, higher-order questioning, and evidence-based writing—participants will:

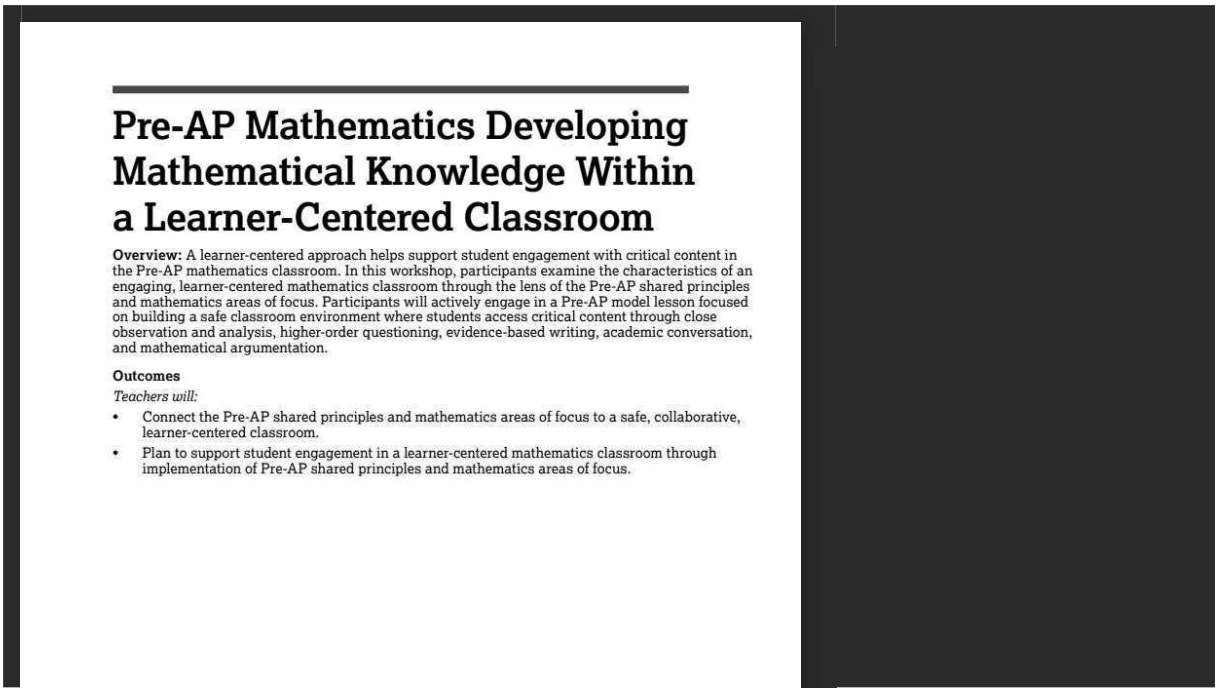
- Connect the Pre-AP shared principles and mathematics areas of focus to a safe, collaborative, learner-centered classroom.
- Plan to support student engagement in a learner-centered mathematics classroom through implementation of Pre-AP shared principles and mathematics areas of focus.

Using Higher-Order Questioning to Support Conceptual Understanding

Focus: The Pre-AP shared principles of higher-order questioning and academic conversation let students bridge concepts and representations to develop deep conceptual understanding. Through modeling of tiered questioning and academic conversations, participants will:

- Connect the Pre-AP shared principle of higher-order questioning to student engagement in grade-level content and the development of mathematical thinking through conceptual understanding.

- Plan to support conceptual understanding through incorporation of higher-order questioning into daily instruction.



Pre-AP Mathematics Developing Mathematical Knowledge Within a Learner-Centered Classroom

Overview: A learner-centered approach helps support student engagement with critical content in the Pre-AP mathematics classroom. In this workshop, participants examine the characteristics of an engaging, learner-centered mathematics classroom through the lens of the Pre-AP shared principles and mathematics areas of focus. Participants will actively engage in a Pre-AP model lesson focused on building a safe classroom environment where students access critical content through close observation and analysis, higher-order questioning, evidence-based writing, academic conversation, and mathematical argumentation.

Outcomes

Teachers will:

- Connect the Pre-AP shared principles and mathematics areas of focus to a safe, collaborative, learner-centered classroom.
- Plan to support student engagement in a learner-centered mathematics classroom through implementation of Pre-AP shared principles and mathematics areas of focus.

Science

Building Conceptual Understanding Using Analytical Reading and Writing

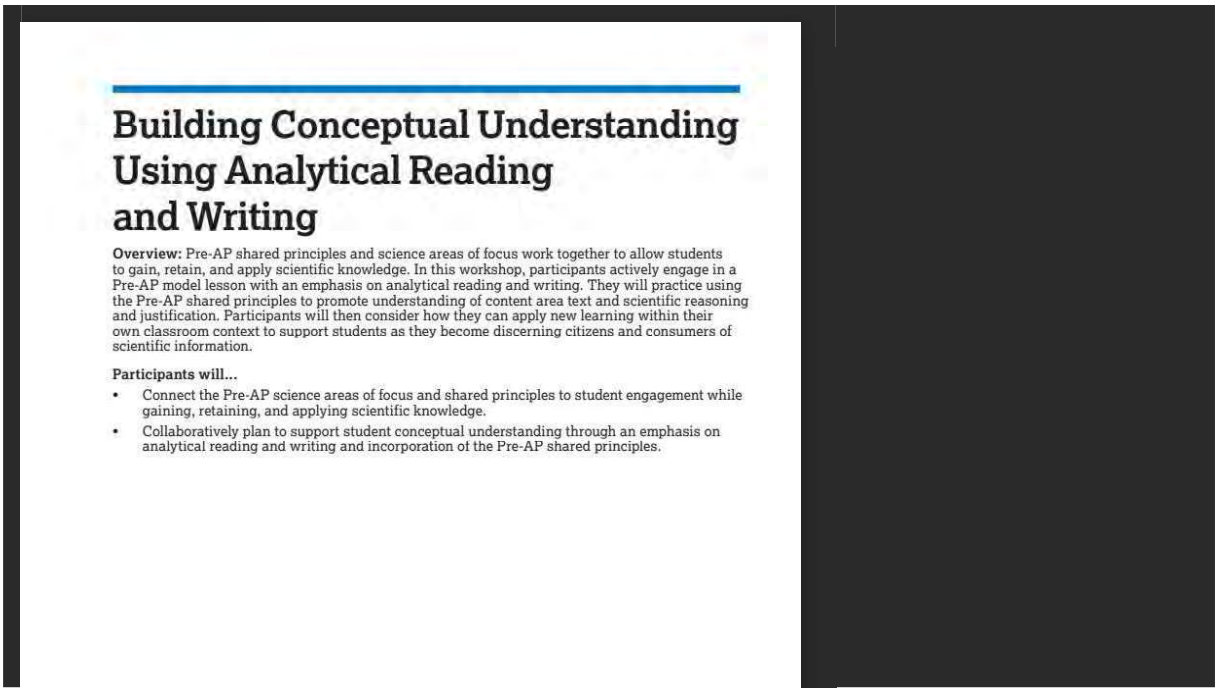
Focus: Actively engaging in a model lesson that emphasizes analytical reading and writing, participants will practice using Pre-AP shared principles to promote understanding of content-area text and scientific reasoning and justification. They'll then consider how they can apply this new learning within their own classrooms—with the goal of supporting students as discerning citizens and consumers of scientific information. Participants will:

- Connect the Pre-AP science areas of focus and shared principles to student engagement in gaining, retaining, and applying scientific knowledge.
- Collaboratively plan to support student conceptual understanding through an emphasis on analytical reading and writing and incorporation of the Pre-AP shared principles.

Developing and Using Models to Construct Scientific Knowledge

Focus: Modeling is a core practice for scientists as they use a variety of models to develop, refine, and communicate their ideas. In this workshop, participants will actively engage in a Pre-AP model lesson with an attention to modeling. They will examine how the Pre-AP shared principles and science areas of focus support student engagement in science practices such as modeling and scientific argumentation. Participants will then consider how they can apply this new learning within their own classroom context to support students in constructing and then modifying their own scientific knowledge as new information becomes available. Participants will:

- Connect the Pre-AP science areas of focus, with attention to modeling, to student engagement in constructing and modifying scientific knowledge.
- Plan to support student construction of scientific knowledge through attention to modeling and incorporation of the Pre-AP shared principles.



Building Conceptual Understanding Using Analytical Reading and Writing

Overview: Pre-AP shared principles and science areas of focus work together to allow students to gain, retain, and apply scientific knowledge. In this workshop, participants actively engage in a Pre-AP model lesson with an emphasis on analytical reading and writing. They will practice using the Pre-AP shared principles to promote understanding of content area text and scientific reasoning and justification. Participants will then consider how they can apply new learning within their own classroom context to support students as they become discerning citizens and consumers of scientific information.

Participants will...

- Connect the Pre-AP science areas of focus and shared principles to student engagement while gaining, retaining, and applying scientific knowledge.
- Collaboratively plan to support student conceptual understanding through an emphasis on analytical reading and writing and incorporation of the Pre-AP shared principles.

Social Studies

Fostering Shared Principles

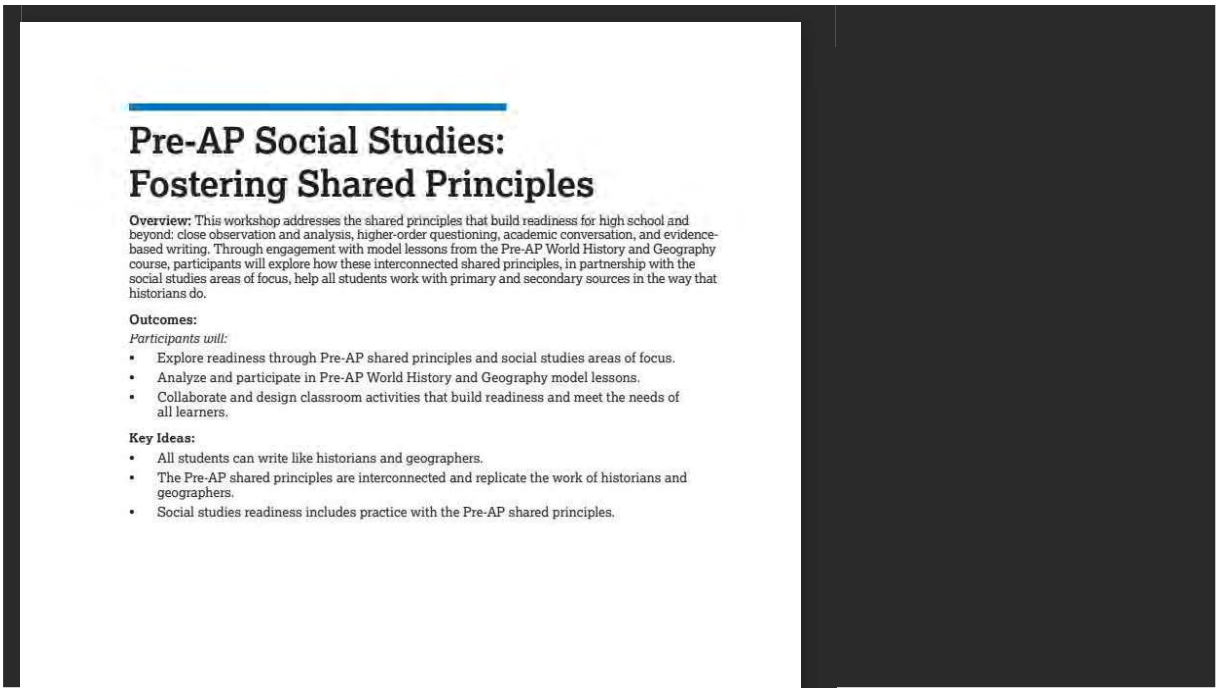
Focus: This workshop addresses the shared principles that build readiness for high school and beyond: close observation and analysis, higher-order questioning, academic conversation, and evidence-based writing. Through engagement with model lessons from the Pre-AP World History and Geography course, participants will explore how these interconnected shared principles, in partnership with the social studies areas of focus, help all students work with primary and secondary sources in the way that historians do. Participants will:

- Explore readiness through Pre-AP shared principles and social studies areas of focus.
- Analyze and participate in model lessons from Pre-AP World History and Geography.
- Collaborate and design classroom activities that build readiness and meet the needs of all learners.

Fostering Disciplinary Skills

Focus: Addressing three areas of focus—evaluating evidence, incorporating evidence, and explaining historical and geographic relationships—participants will:

- Explore Pre-AP model lessons with essential skills and primary and secondary sources.
- Collaborate and design in-person and virtual classroom activities featuring the Pre-AP shared principles and social studies areas of focus.



Pre-AP Social Studies: Fostering Shared Principles

Overview: This workshop addresses the shared principles that build readiness for high school and beyond: close observation and analysis, higher-order questioning, academic conversation, and evidence-based writing. Through engagement with model lessons from the Pre-AP World History and Geography course, participants will explore how these interconnected shared principles, in partnership with the social studies areas of focus, help all students work with primary and secondary sources in the way that historians do.

Outcomes:

Participants will:

- Explore readiness through Pre-AP shared principles and social studies areas of focus.
- Analyze and participate in Pre-AP World History and Geography model lessons.
- Collaborate and design classroom activities that build readiness and meet the needs of all learners.

Key Ideas:

- All students can write like historians and geographers.
- The Pre-AP shared principles are interconnected and replicate the work of historians and geographers.
- Social studies readiness includes practice with the Pre-AP shared principles.

Visual and Performing Arts

Documenting the Process of Thinking and Creating

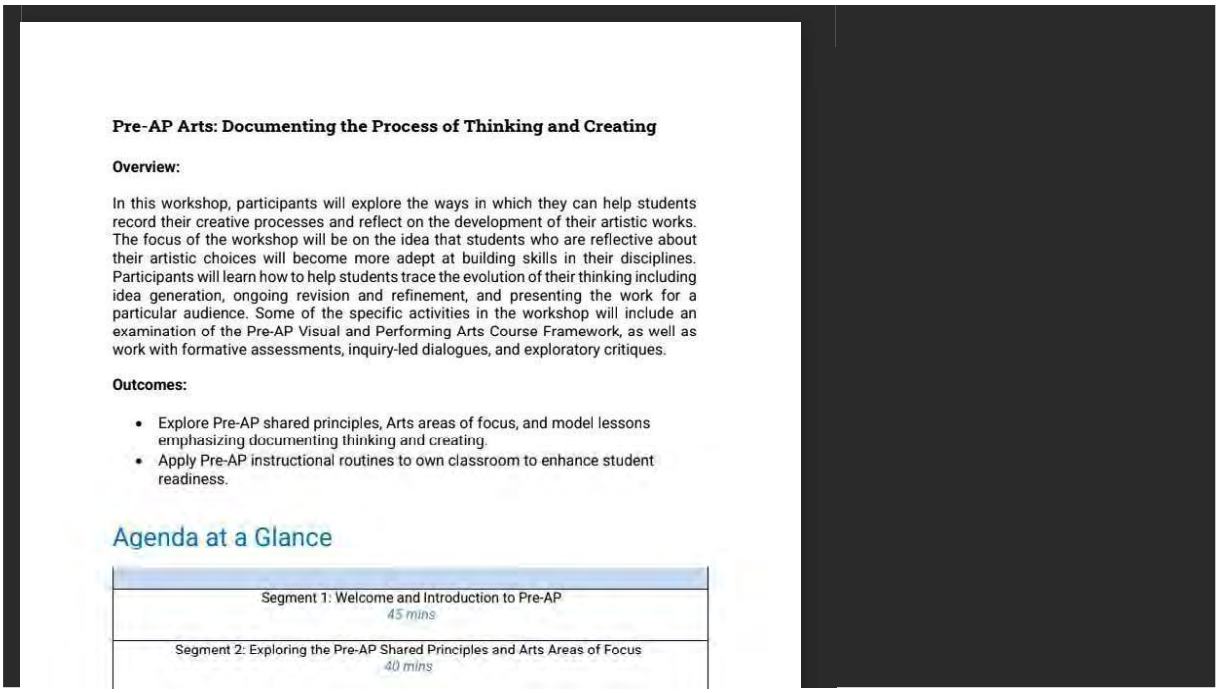
Focus: This workshop is based on the idea that students who are reflective about their artistic choices become adept in building skills in their disciplines. Participants will:

- Examine the Pre-AP Visual and Performing Arts Course Framework, work with formative assessments, inquiry-led dialogues, and exploratory critiques.
- Learn how to get students to trace the evolution of thinking, including idea generation, ongoing revision and refinement, and presentation of their work for an audience.
- Practice classroom exercises alongside their peers and plan instruction that is designed to engage students in analysis, reflection, and metacognition.

Facilitating Risk-Taking, Inventiveness, and Experimentation

Focus: The Pre-AP Arts classroom facilitates risk-taking, inventiveness, and experimentation, so students can engage more deeply in the visual and performing arts creative process. This workshop shows how trial and error supports students who are more confident and willing to improve their skills. Participants will:

- Learn how to provide guided, structured opportunities for student choice and agency in each phase of the creative process.
- Work hands-on with guiding and exploratory questions along with performing reflective activities that will help them empower their students to find new techniques.



Pre-AP Arts: Documenting the Process of Thinking and Creating

Overview:

In this workshop, participants will explore the ways in which they can help students record their creative processes and reflect on the development of their artistic works. The focus of the workshop will be on the idea that students who are reflective about their artistic choices will become more adept at building skills in their disciplines. Participants will learn how to help students trace the evolution of their thinking including idea generation, ongoing revision and refinement, and presenting the work for a particular audience. Some of the specific activities in the workshop will include an examination of the Pre-AP Visual and Performing Arts Course Framework, as well as work with formative assessments, inquiry-led dialogues, and exploratory critiques.

Outcomes:

- Explore Pre-AP shared principles, Arts areas of focus, and model lessons emphasizing documenting thinking and creating.
- Apply Pre-AP instructional routines to own classroom to enhance student readiness.

Agenda at a Glance

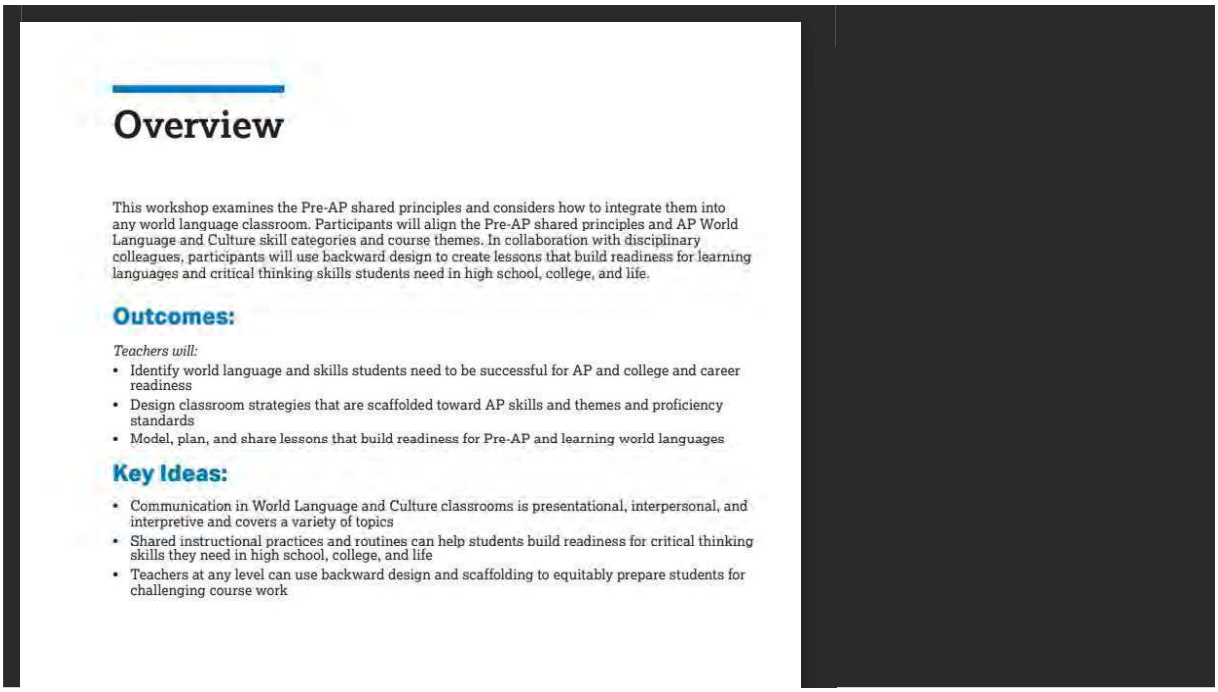
Segment 1: Welcome and Introduction to Pre-AP *45 mins*
Segment 2: Exploring the Pre-AP Shared Principles and Arts Areas of Focus *40 mins*

World Language and Culture

Applying Pre-AP Shared Principles

Focus: Examining Pre-AP shared principles, participants will learn how to integrate them into any world language classroom. Participants will:

- Examine AP themes of World Language and Culture and consider how to use them in their current work.
- Use their findings to collaborate on instructional plans that integrate Pre-AP shared principles and AP themes and, in doing so, help students work toward Pre-AP, AP, college, and career readiness.



Overview

This workshop examines the Pre-AP shared principles and considers how to integrate them into any world language classroom. Participants will align the Pre-AP shared principles and AP World Language and Culture skill categories and course themes. In collaboration with disciplinary colleagues, participants will use backward design to create lessons that build readiness for learning languages and critical thinking skills students need in high school, college, and life.

Outcomes:

Teachers will:

- Identify world language and skills students need to be successful for AP and college and career readiness
- Design classroom strategies that are scaffolded toward AP skills and themes and proficiency standards
- Model, plan, and share lessons that build readiness for Pre-AP and learning world languages

Key Ideas:

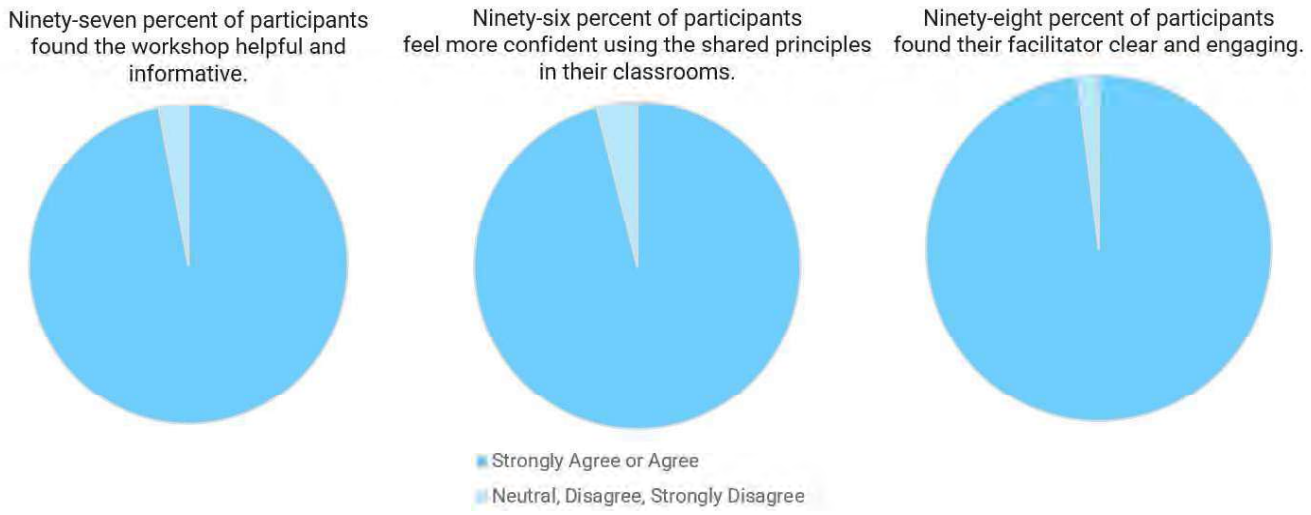
- Communication in World Language and Culture classrooms is presentational, interpersonal, and interpretive and covers a variety of topics
- Shared instructional practices and routines can help students build readiness for critical thinking skills they need in high school, college, and life
- Teachers at any level can use backward design and scaffolding to equitably prepare students for challenging course work

Audience	• Any teacher or instructional coach in grades 6—12 • Participants: 5 minimum, 28 maximum
Delivery	• In person • Virtual, synchronous (all but Arts and World Language and Culture)
Duration	• In person, one day • Virtual, one day
Availability	• Private purchase by school, district, or state • Available throughout the year • Order required *at least* 60 days in advance
Price	• In-person: $4,600 for members; $5,250 for nonmembers. • Virtual: $2,500 for members; $2,850 for nonmembers. Membership is based on an annual fee paid by your institution.

	Find the membership status of your institution here: Home -- Membership | College Board
Continuing Education Units (CEUs)	• In person: 0.6 • Virtual: 0.5
Course Audit Required	No

Preview a virtual workshop with a clip from the Virtual Pre-AP English Language Arts Readiness Workshop: Texts Take Center Stage.

Participant Feedback



Need an agenda? Use the following printable PDF version.

PDF

Pre-AP Readiness Workshops Agendas at a Glance.pdf
857 KB

2. Readiness Workshops for Leaders



Purpose

The Pre-AP Leadership Readiness Workshop is designed for leaders interested in preparing for a Pre-AP implementation or integrating the Pre-AP instructional principles into classrooms to support high-quality instruction.

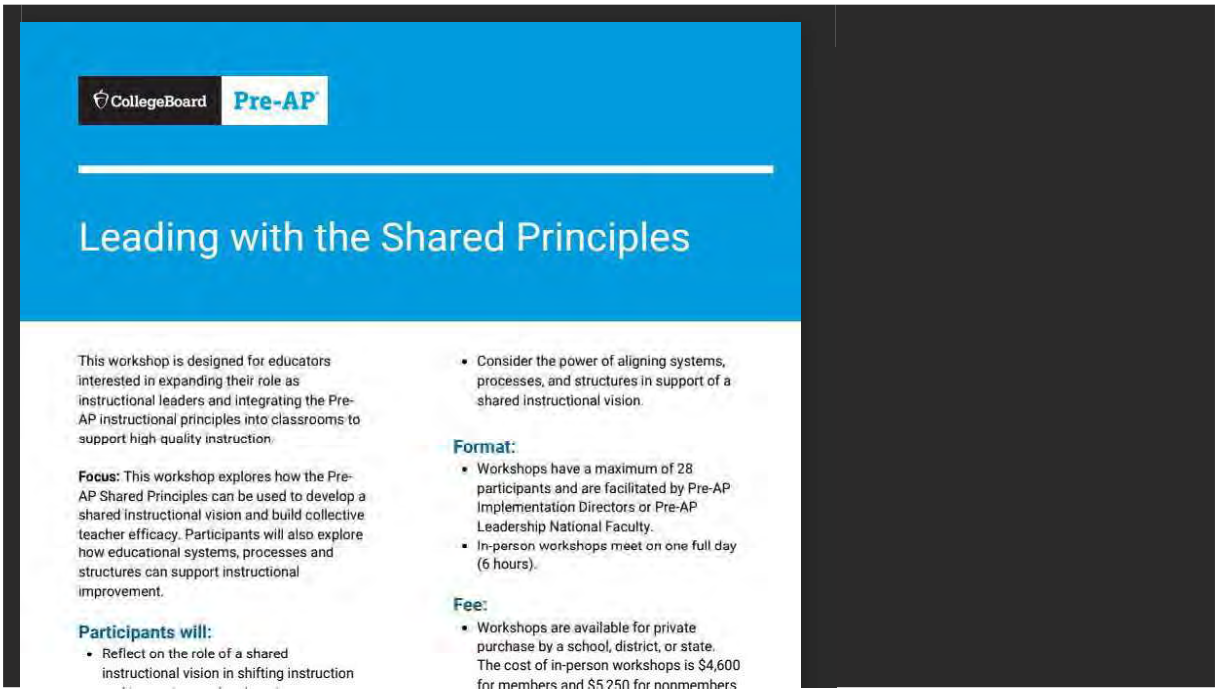
Objectives

- Explore how the Pre-AP shared principles can be used to develop a shared instructional vision and build collective teacher efficacy.
- Explore how educational systems, processes and structures can support instructional improvement.

Pre-AP Readiness Workshop Offering

Use the plus sign (+) to learn more about this leadership readiness workshop, including the focus, objectives, and format.

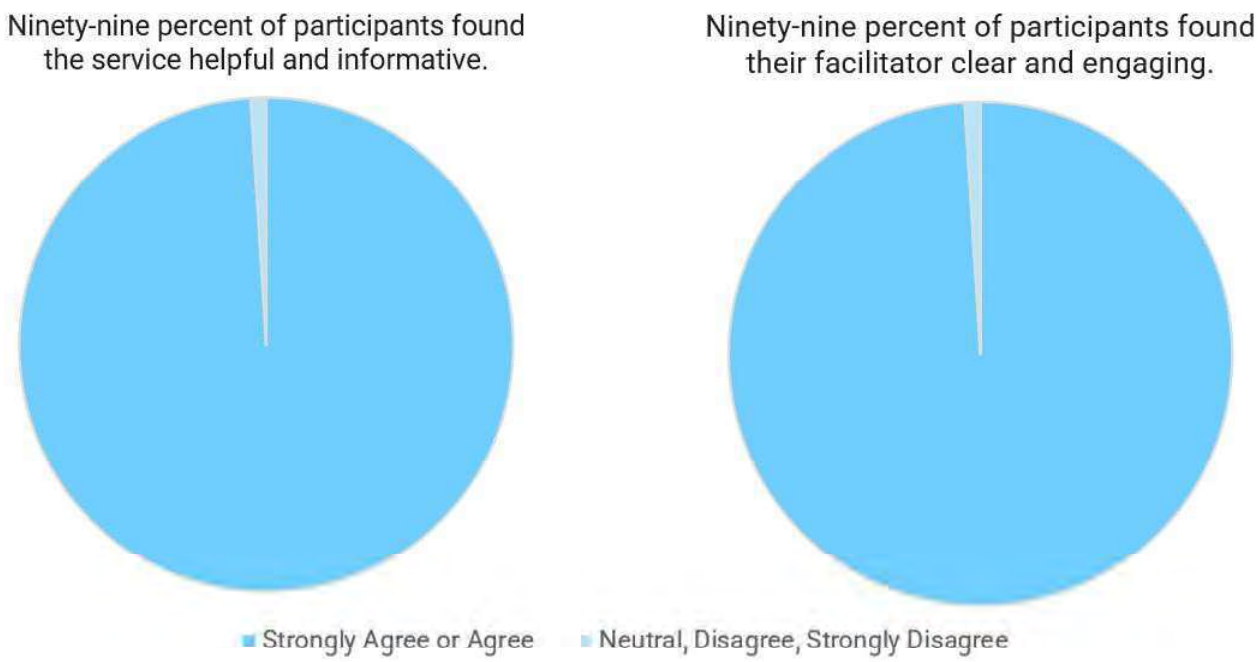
Leading with the Shared Principles



Audience	• Any leader or instructional coach in grades 6—12 • Participants: 5 minimum, 28 maximum
Delivery	• In person • Virtual, synchronous
Duration	One day
Availability	• Private purchase by school, district, or state • Available throughout the year • Order required *at least* 60 days in advance

Price	• In person: $4,600 for members; $5,250 for nonmembers. • Virtual: $2,500 for members; $2,850 for nonmembers. Membership is based on an annual fee paid by your institution. Find the membership status of your institution here: Home -- Membership | College Board.
Continuing Education Units (CEUs)	0.6
Course Audit Required	No

Participant Feedback



Need an agenda? Use the following printable PDF version.

PDF

Pre-AP Readiness Workshop Leading with the Shared Principles.pdf
1.7 MB

Comparison Analysis

Teacher and Leader Pre-AP Readiness Workshops at a Glance

	Teacher Readiness Workshops	Leader Readiness Workshop
Audience	• Any teacher or instructional coach in grades 6—12 • Participants: 5 minimum, 28 maximum	• Any leader or instructional coach in grades 6—12 • Participants: 5 minimum, 28 maximum
Delivery	• In person • Virtual, synchronous	• In person • Virtual, synchronous
Duration	One day	One day
Availability	• Private purchase by school, district, or state • Available throughout the year	• Private purchase by school, district, or state • Available throughout the year

	• Order required *at least* 60 days in advance	• Order required *at least* 60 days in advance
Price	• In person: $4,600 for members; $5,250 for nonmembers • Virtual: $2,500 for members; $2,850 for nonmembers	• In person: $4,600 for members; $5,250 for nonmembers • Virtual: $2,500 for members; $2,850 for nonmembers
Continuing Education Units (CEUs)	• In person: 0.6 • Virtual: 0.5	0.6
Course Audit Required	No	No

PDF

Building the Foundation for Leaders at a Glance 2025.pdf
108.9 KB

Private Pre-AP Professional Learning Order Form

Complete the form to order a private teacher or leader service, or request a quote for your school or district.

READINESS

Thank you!

Use the Continue bar to explore professional learning offerings that build the foundation for course teachers new to Pre-AP.

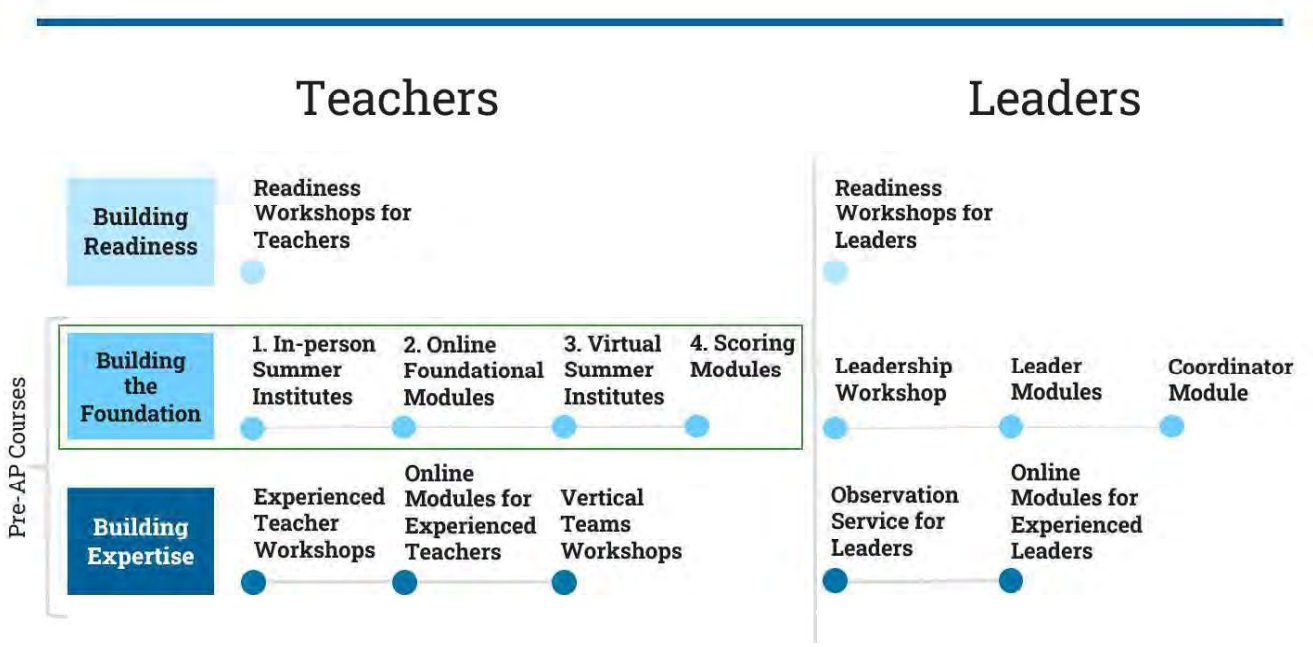
CONTINUE TO BUILDING THE FOUNDATION FOR COURSE TEACHERS

Building the Foundation for Teachers New to Pre-AP Courses

Pre-AP Professional Learning:

Building the Foundation for Teachers

Created for course teachers ***new*** to Pre-AP courses.



1. In-Person Pre-AP Summer Institutes

We come to you!



Purpose

Pre-AP Summer Institutes provide the most comprehensive professional learning available for teachers new to Pre-AP courses. These institutes empower participants to learn about the Pre-AP Program, familiarize themselves with the student and teacher resources, and start building their courses so they're ready on the first day of school. Participants gain new skills and insights with a supportive peer network and expert National Faculty, while developing connections within the Pre-AP community.

Objectives

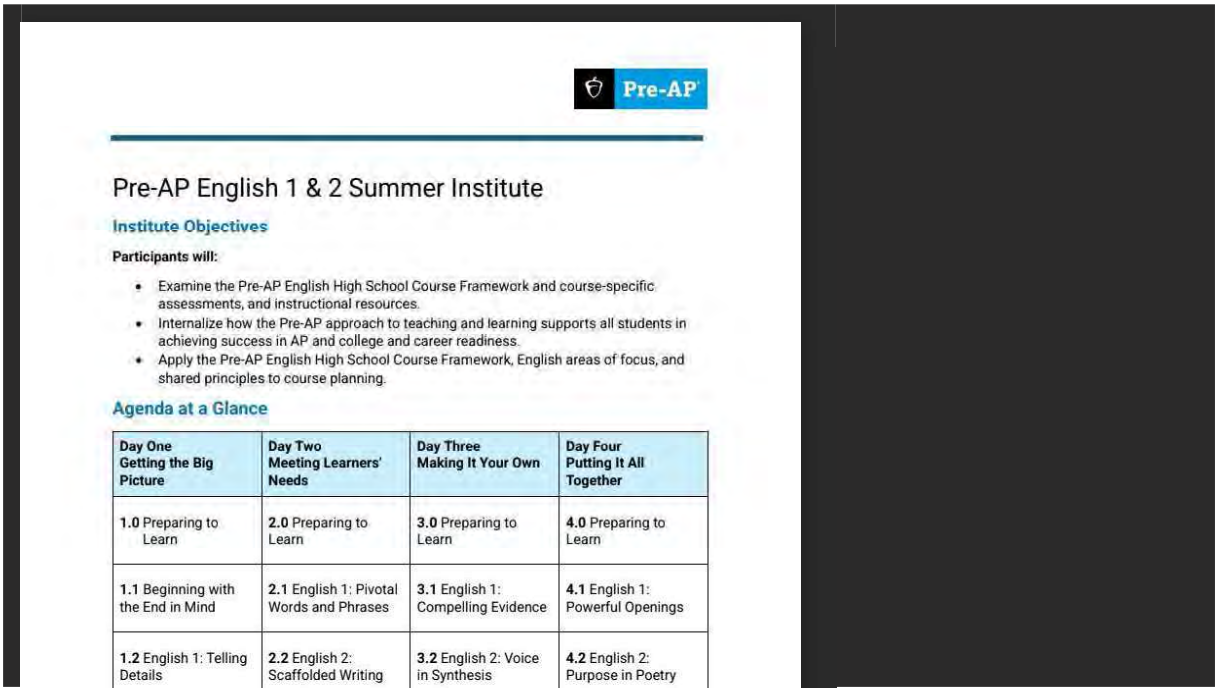
- Demonstrate how Pre-AP courses support all students in achieving college and career readiness, access to AP coursework, and beyond.

- Examine the Pre-AP course frameworks, instructional materials, and assessments.
- Build a Pre-AP course by applying Pre-AP course frameworks, shared principles, and disciplinary areas of focus.

In-Person Pre-AP Summer Institutes

Use the plus sign (+) to learn more about the Pre-AP Summer Institutes available including the objectives and sample agendas.

Pre-AP English: English 1 and English 2



Pre-AP

Pre-AP English 1 & 2 Summer Institute

Institute Objectives

Participants will:

- Examine the Pre-AP English High School Course Framework and course-specific assessments, and instructional resources.
- Internalize how the Pre-AP approach to teaching and learning supports all students in achieving success in AP and college and career readiness.
- Apply the Pre-AP English High School Course Framework, English areas of focus, and shared principles to course planning.

Agenda at a Glance

Day One Getting the Big Picture	Day Two Meeting Learners' Needs	Day Three Making It Your Own	Day Four Putting It All Together
1.0 Preparing to Learn	**2.0** Preparing to Learn	**3.0** Preparing to Learn	**4.0** Preparing to Learn
1.1 Beginning with the End in Mind	**2.1** English 1: Pivotal Words and Phrases	**3.1** English 1: Compelling Evidence	**4.1** English 1: Powerful Openings
1.2 English 1: Telling Details	**2.2** English 2: Scaffolded Writing	**3.2** English 2: Voice in Synthesis	**4.2** English 2: Purpose in Poetry

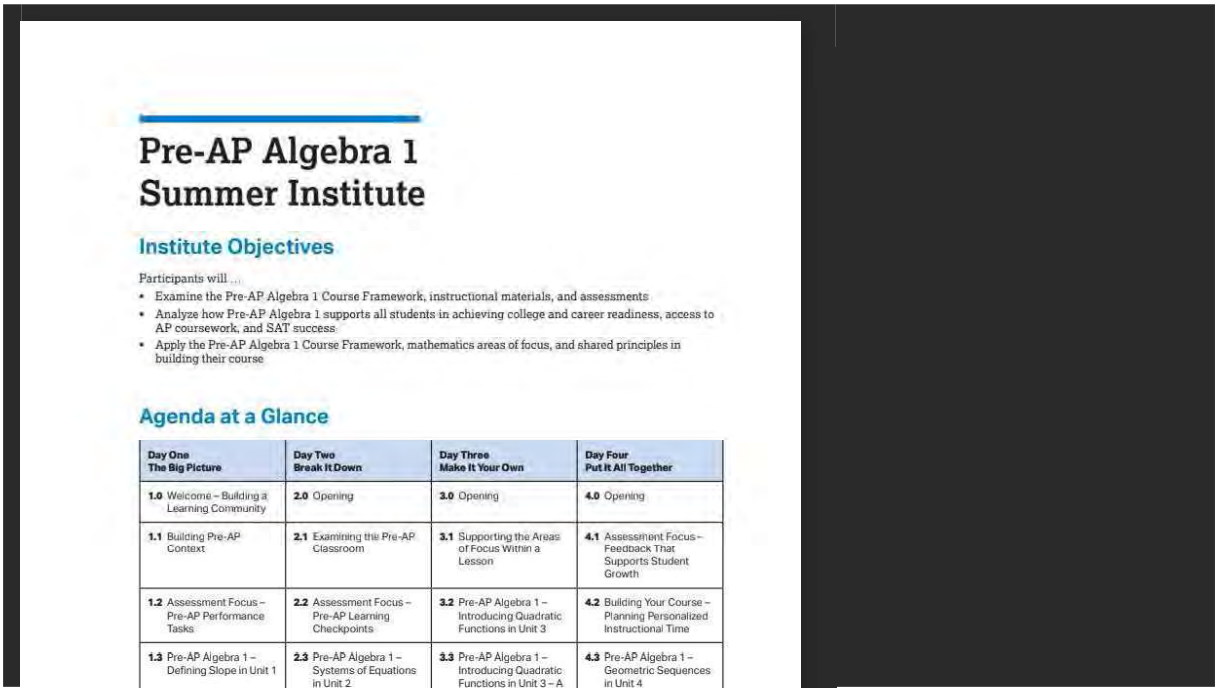
Pre-AP Math: Algebra 1, Algebra 2, and Geometry with Statistics

Agenda coming in March 2025.

Pre-AP Science: Biology and Chemistry

Agenda coming in March 2025.

Algebra 1



Pre-AP Algebra 1 Summer Institute

Institute Objectives

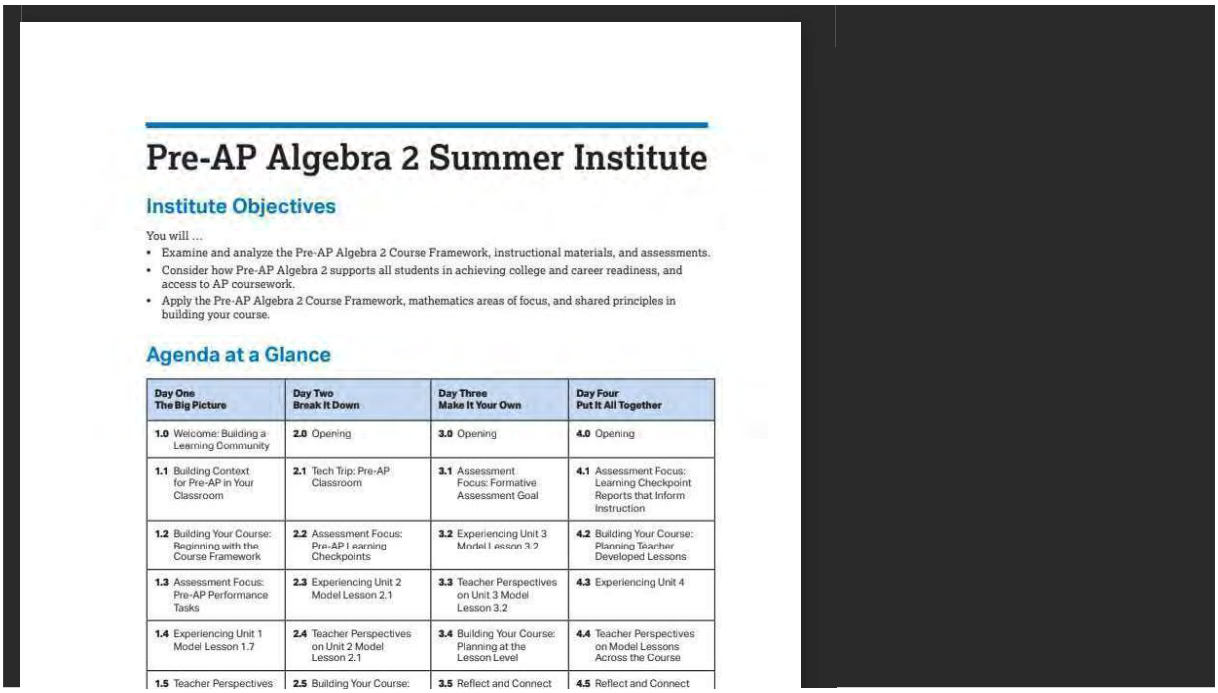
Participants will ...

- Examine the Pre-AP Algebra 1 Course Framework, instructional materials, and assessments
- Analyze how Pre-AP Algebra 1 supports all students in achieving college and career readiness, access to AP coursework, and SAT success
- Apply the Pre-AP Algebra 1 Course Framework, mathematics areas of focus, and shared principles in building their course

Agenda at a Glance

Day One The Big Picture	Day Two Break It Down	Day Three Make It Your Own	Day Four Put It All Together
1.0 Welcome – Building a Learning Community	**2.0** Opening	**3.0** Opening	**4.0** Opening
1.1 Building Pre-AP Context	**2.1** Examining the Pre-AP Classroom	**3.1** Supporting the Areas of Focus Within a Lesson	**4.1** Assessment Focus – Feedback That Supports Student Growth
1.2 Assessment Focus – Pre-AP Performance Tasks	**2.2** Assessment Focus – Pre-AP Learning Checkpoints	**3.2** Pre-AP Algebra 1 – Introducing Quadratic Functions in Unit 3	**4.2** Building Your Course – Planning Personalized Instructional Time
1.3 Pre-AP Algebra 1 – Defining Slope in Unit 1	**2.3** Pre-AP Algebra 1 – Systems of Equations in Unit 2	**3.3** Pre-AP Algebra 1 – Introducing Quadratic Functions in Unit 3 – A	**4.3** Pre-AP Algebra 1 – Geometric Sequences in Unit 4

Algebra 2



Pre-AP Algebra 2 Summer Institute

Institute Objectives

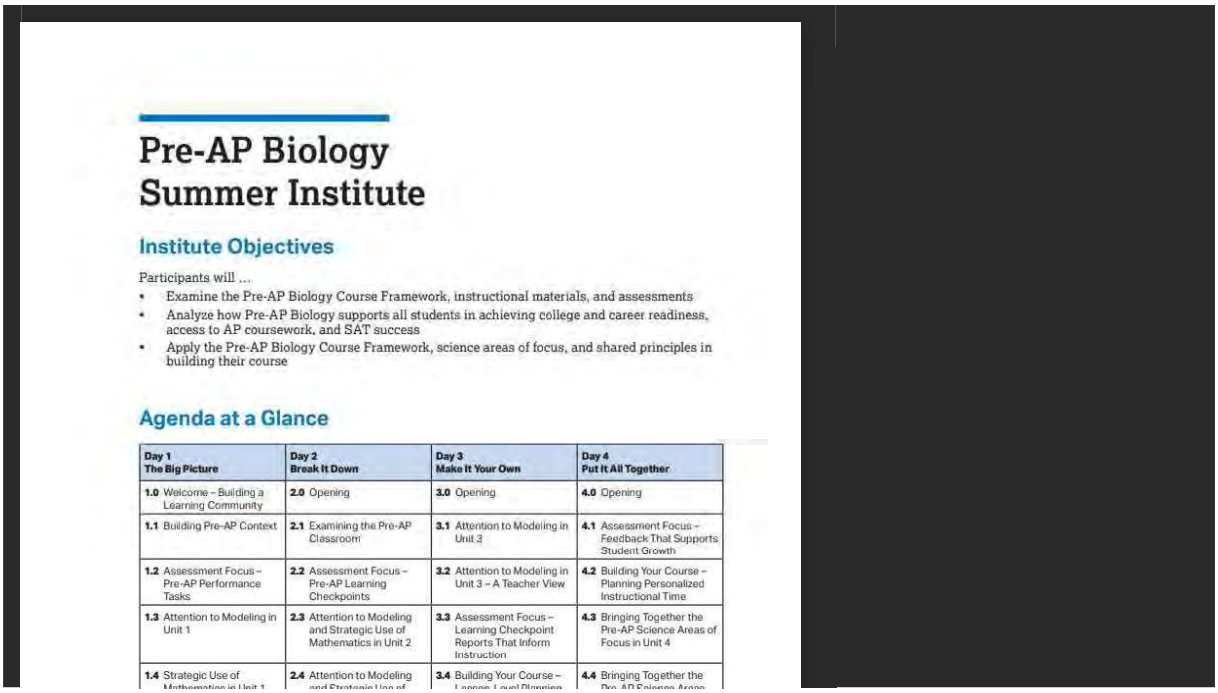
You will …

- Examine and analyze the Pre-AP Algebra 2 Course Framework, instructional materials, and assessments.
- Consider how Pre-AP Algebra 2 supports all students in achieving college and career readiness, and access to AP coursework.
- Apply the Pre-AP Algebra 2 Course Framework, mathematics areas of focus, and shared principles in building your course.

Agenda at a Glance

Day One The Big Picture	Day Two Break It Down	Day Three Make It Your Own	Day Four Put It All Together
1.0 Welcome: Building a Learning Community	**2.0** Opening	**3.0** Opening	**4.0** Opening
1.1 Building Context for Pre-AP in Your Classroom	**2.1** Tech Trip: Pre-AP Classroom	**3.1** Assessment Focus: Formative Assessment Goal	**4.1** Assessment Focus: Learning Checkpoint Reports that Inform Instruction
1.2 Building Your Course: Beginning with the Course Framework	**2.2** Assessment Focus: Pre-AP Learning Checkpoints	**3.2** Experiencing Unit 3 Model Lesson 3.2	**4.2** Building Your Course: Planning Teacher Developed Lessons
1.3 Assessment Focus: Pre-AP Performance Tasks	**2.3** Experiencing Unit 2 Model Lesson 2.1	**3.3** Teacher Perspectives on Unit 3 Model Lesson 3.2	**4.3** Experiencing Unit 4
1.4 Experiencing Unit 1 Model Lesson 1.7	**2.4** Teacher Perspectives on Unit 2 Model Lesson 2.1	**3.4** Building Your Course: Planning at the Lesson Level	**4.4** Teacher Perspectives on Model Lessons Across the Course
1.5 Teacher Perspectives	**2.5** Building Your Course:	**3.5** Reflect and Connect	**4.5** Reflect and Connect

Biology _



Pre-AP Biology Summer Institute

Institute Objectives

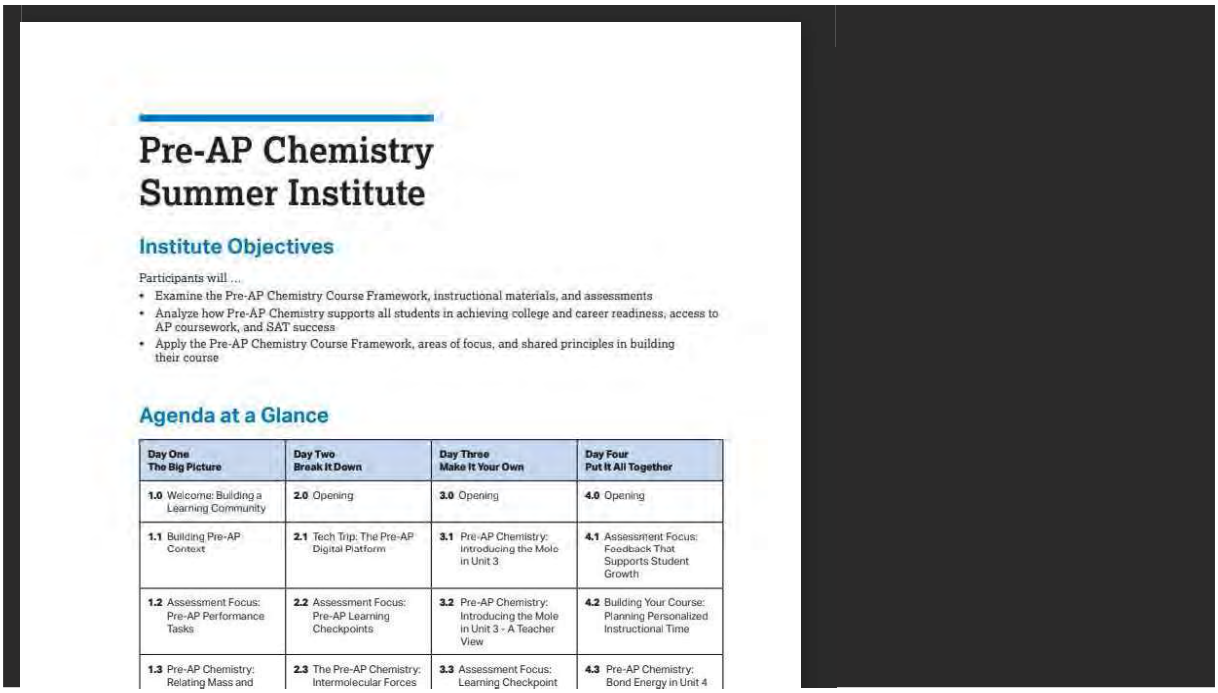
Participants will ...

- Examine the Pre-AP Biology Course Framework, instructional materials, and assessments
- Analyze how Pre-AP Biology supports all students in achieving college and career readiness, access to AP coursework, and SAT success
- Apply the Pre-AP Biology Course Framework, science areas of focus, and shared principles in building their course

Agenda at a Glance

Day 1 The Big Picture	Day 2 Break It Down	Day 3 Make It Your Own	Day 4 Put It All Together
1.0 Welcome – Building a Learning Community	**2.0** Opening	**3.0** Opening	**4.0** Opening
1.1 Building Pre-AP Context	**2.1** Examining the Pre-AP Classroom	**3.1** Attention to Modeling in Unit 3	**4.1** Assessment Focus – Feedback That Supports Student Growth
1.2 Assessment Focus – Pre-AP Performance Tasks	**2.2** Assessment Focus – Pre-AP Learning Checkpoints	**3.2** Attention to Modeling in Unit 3 – A Teacher View	**4.2** Building Your Course – Planning Personalized Instructional Time
1.3 Attention to Modeling in Unit 1	**2.3** Attention to Modeling and Strategic Use of Mathematics in Unit 2	**3.3** Assessment Focus – Learning Checkpoint Reports That Inform Instruction	**4.3** Bringing Together the Pre-AP Science Areas of Focus in Unit 4
1.4 Strategic Use of	**2.4** Attention to Modeling	**3.4** Building Your Course –	**4.4** Bringing Together the

Chemistry _



Pre-AP Chemistry Summer Institute

Institute Objectives

Participants will ...

- Examine the Pre-AP Chemistry Course Framework, instructional materials, and assessments
- Analyze how Pre-AP Chemistry supports all students in achieving college and career readiness, access to AP coursework, and SAT success
- Apply the Pre-AP Chemistry Course Framework, areas of focus, and shared principles in building their course

Agenda at a Glance

Day One The Big Picture	Day Two Break It Down	Day Three Make It Your Own	Day Four Put It All Together
1.0 Welcome: Building a Learning Community	**2.0** Opening	**3.0** Opening	**4.0** Opening
1.1 Building Pre-AP Context	**2.1** Tech Trip: The Pre-AP Digital Platform	**3.1** Pre-AP Chemistry: Introducing the Mole in Unit 3	**4.1** Assessment Focus: Feedback That Supports Student Growth
1.2 Assessment Focus: Pre-AP Performance Tasks	**2.2** Assessment Focus: Pre-AP Learning Checkpoints	**3.2** Pre-AP Chemistry: Introducing the Mole in Unit 3 - A Teacher View	**4.2** Building Your Course: Planning Personalized Instructional Time
1.3 Pre-AP Chemistry: Relating Mass and	**2.3** The Pre-AP Chemistry: Intermolecular Forces	**3.3** Assessment Focus: Learning Checkpoint	**4.3** Pre-AP Chemistry: Bond Energy in Unit 4

English 1 _



Pre-AP English 1 Summer Institute

Institute Objectives

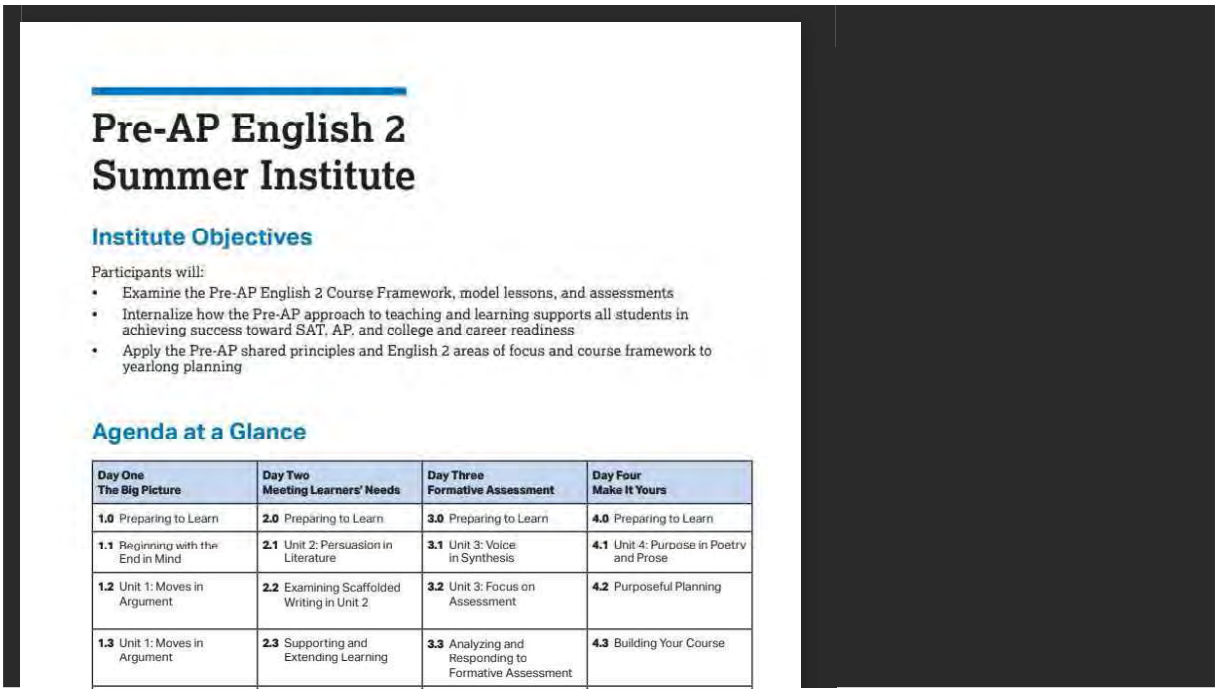
Participants will:

- Examine the Pre-AP English 1 Course Framework, assessments, and instructional resources
- Internalize how the Pre-AP approach to teaching and learning supports all students in achieving success toward SAT, AP, and college and career readiness
- Apply the Pre-AP English 1 course framework, areas of focus, and shared principles to course planning

Agenda at a Glance

Day One Getting the Big Picture	Day Two Meeting Learners' Needs	Day Three Making It Your Own	Day Four Putting It All Together
1.0 Preparing to Learn	**2.0** Preparing to Learn	**3.0** Preparing to Learn	**4.0** Preparing to Learn
1.1 Beginning with the End in Mind	**2.1** Experiencing Instructional Resources: From Unit 2 – Pivotal Words and Phrases	**3.1** Experiencing Instructional Resources: Unit 3 – Compelling Evidence	**4.1** Experiencing Instructional Resources: Unit 4 – Powerful Openings
1.2 Experiencing Instructional Resources: Unit 1 – Telling Details	**2.2** Analyzing Instructional Resources: Writing Tasks	**3.2** Examining Pre-AP Assessments for Learning	**4.2** Synthesizing Course Components
1.3 Analyzing Instructional Resources: Writing Instruction	**2.3** Examining Teacher Resources & Online Tools	**3.3** Using Pre-AP Assessment Results for Actionable Feedback	**4.3** Synthesizing the Year-long Sequence
1.4 Connecting, Reflecting, Goal Setting	**2.4** Building Your Course	**3.4** Building Your Course	**4.4** Building Your Course

English 2 _



Pre-AP English 2 Summer Institute

Institute Objectives

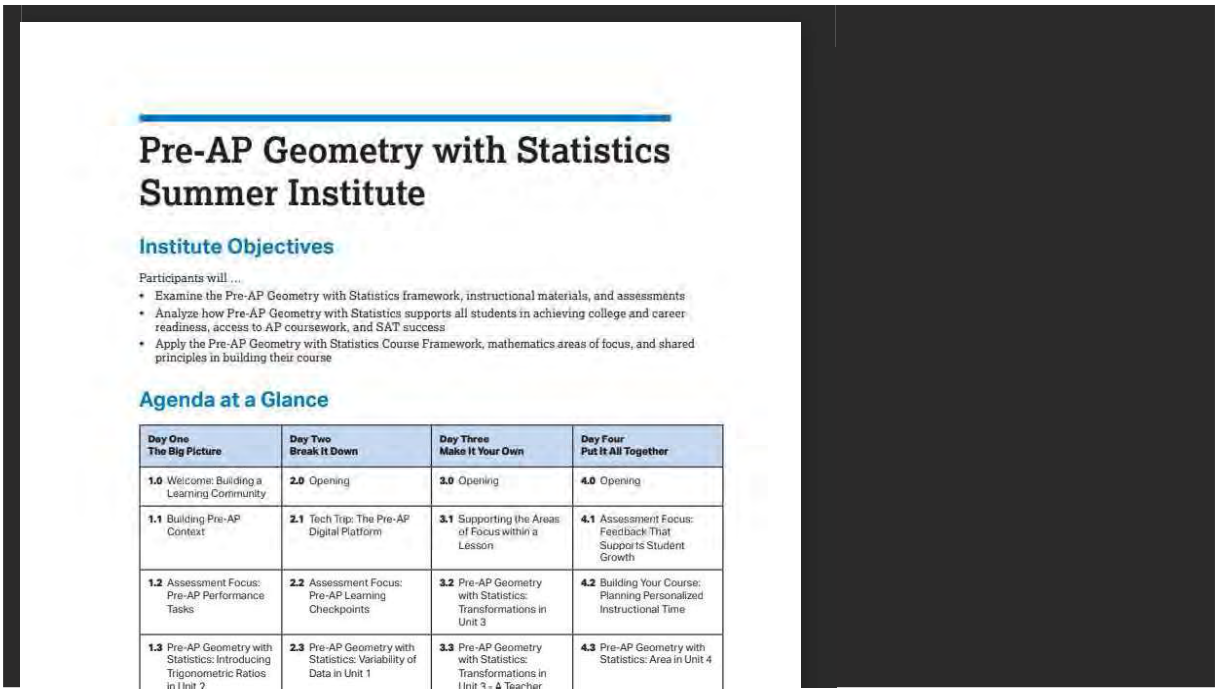
Participants will:

- Examine the Pre-AP English 2 Course Framework, model lessons, and assessments
- Internalize how the Pre-AP approach to teaching and learning supports all students in achieving success toward SAT, AP, and college and career readiness
- Apply the Pre-AP shared principles and English 2 areas of focus and course framework to yearlong planning

Agenda at a Glance

Day One The Big Picture	Day Two Meeting Learners' Needs	Day Three Formative Assessment	Day Four Make It Yours
1.0 Preparing to Learn	**2.0** Preparing to Learn	**3.0** Preparing to Learn	**4.0** Preparing to Learn
1.1 Beginning with the End in Mind	**2.1** Unit 2: Persuasion in Literature	**3.1** Unit 3: Voice in Synthesis	**4.1** Unit 4: Purpose in Poetry and Prose
1.2 Unit 1: Moves in Argument	**2.2** Examining Scaffolded Writing in Unit 2	**3.2** Unit 3: Focus on Assessment	**4.2** Purposeful Planning
1.3 Unit 1: Moves in Argument	**2.3** Supporting and Extending Learning	**3.3** Analyzing and Responding to Formative Assessment	**4.3** Building Your Course

Geometry with Statistics _



Pre-AP Geometry with Statistics Summer Institute

Institute Objectives

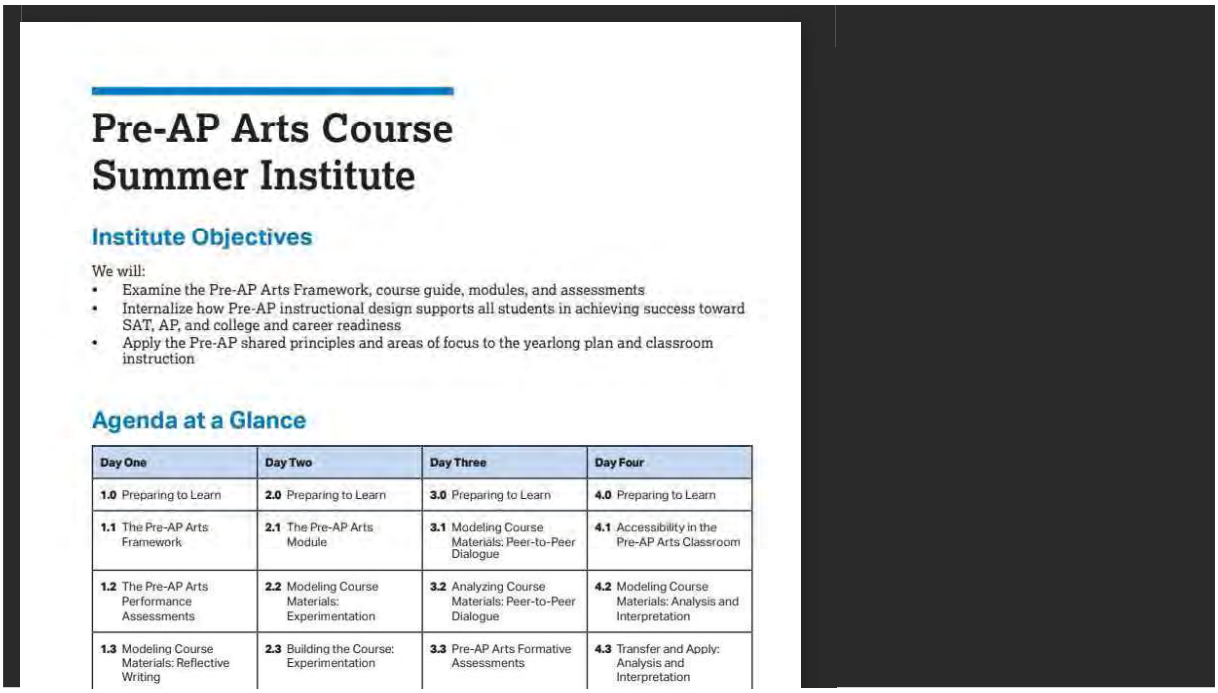
Participants will ...

- Examine the Pre-AP Geometry with Statistics framework, instructional materials, and assessments
- Analyze how Pre-AP Geometry with Statistics supports all students in achieving college and career readiness, access to AP coursework, and SAT success
- Apply the Pre-AP Geometry with Statistics Course Framework, mathematics areas of focus, and shared principles in building their course

Agenda at a Glance

Day One The Big Picture	Day Two Break it Down	Day Three Make It Your Own	Day Four Put It All Together
1.0 Welcome: Building a Learning Community	**2.0** Opening	**3.0** Opening	**4.0** Opening
1.1 Building Pre-AP Context	**2.1** Tech Trip: The Pre-AP Digital Platform	**3.1** Supporting the Areas of Focus within a Lesson	**4.1** Assessment Focus: Feedback That Supports Student Growth
1.2 Assessment Focus: Pre-AP Performance Tasks	**2.2** Assessment Focus: Pre-AP Learning Checkpoints	**3.2** Pre-AP Geometry with Statistics: Transformations in Unit 3	**4.2** Building Your Course: Planning Personalized Instructional Time
1.3 Pre-AP Geometry with Statistics: Introducing Trigonometric Ratios in Unit 2	**2.3** Pre-AP Geometry with Statistics: Variability of Data in Unit 1	**3.3** Pre-AP Geometry with Statistics: Transformations in Unit 3 – A Teacher	**4.3** Pre-AP Geometry with Statistics: Area in Unit 4

Visual and Performing Arts _



Pre-AP Arts Course Summer Institute

Institute Objectives

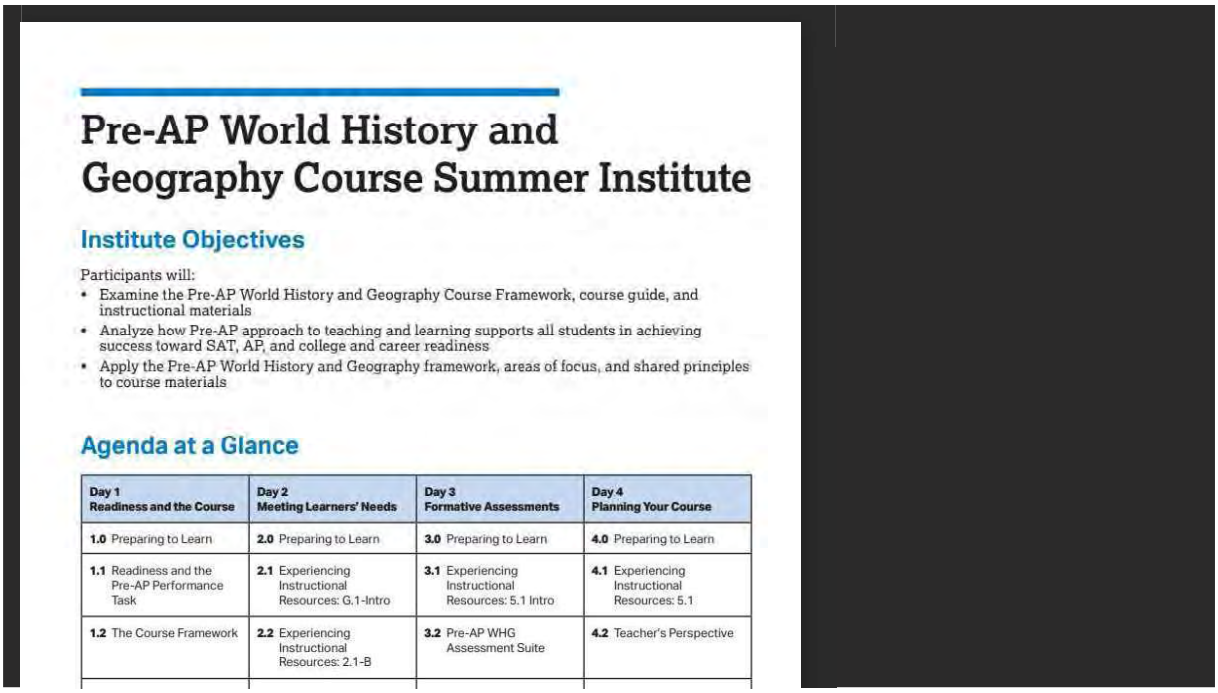
We will:

- Examine the Pre-AP Arts Framework, course guide, modules, and assessments
- Internalize how Pre-AP instructional design supports all students in achieving success toward SAT, AP, and college and career readiness
- Apply the Pre-AP shared principles and areas of focus to the yearlong plan and classroom instruction

Agenda at a Glance

Day One	Day Two	Day Three	Day Four
1.0 Preparing to Learn	**2.0** Preparing to Learn	**3.0** Preparing to Learn	**4.0** Preparing to Learn
1.1 The Pre-AP Arts Framework	**2.1** The Pre-AP Arts Module	**3.1** Modeling Course Materials: Peer-to-Peer Dialogue	**4.1** Accessibility in the Pre-AP Arts Classroom
1.2 The Pre-AP Arts Performance Assessments	**2.2** Modeling Course Materials: Experimentation	**3.2** Analyzing Course Materials: Peer-to-Peer Dialogue	**4.2** Modeling Course Materials: Analysis and Interpretation
1.3 Modeling Course Materials: Reflective Writing	**2.3** Building the Course: Experimentation	**3.3** Pre-AP Arts Formative Assessments	**4.3** Transfer and Apply: Analysis and Interpretation

World History and Geography



Pre-AP World History and Geography Course Summer Institute

Institute Objectives

Participants will:

- Examine the Pre-AP World History and Geography Course Framework, course guide, and instructional materials
- Analyze how Pre-AP approach to teaching and learning supports all students in achieving success toward SAT, AP, and college and career readiness
- Apply the Pre-AP World History and Geography framework, areas of focus, and shared principles to course materials

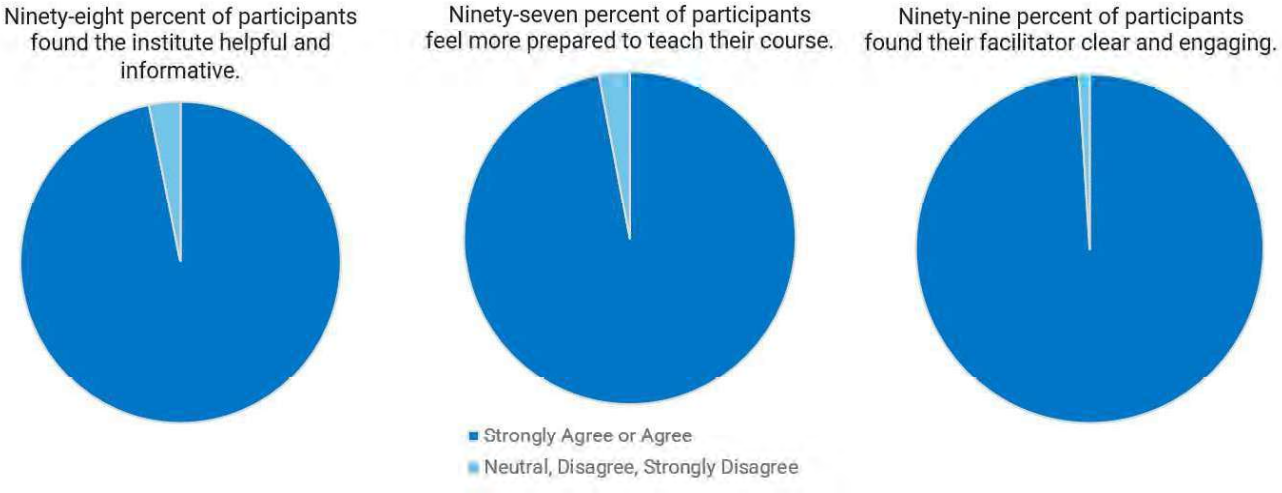
Agenda at a Glance

Day 1 Readiness and the Course	Day 2 Meeting Learners' Needs	Day 3 Formative Assessments	Day 4 Planning Your Course
1.0 Preparing to Learn	**2.0** Preparing to Learn	**3.0** Preparing to Learn	**4.0** Preparing to Learn
1.1 Readiness and the Pre-AP Performance Task	**2.1** Experiencing Instructional Resources: G.1-Intro	**3.1** Experiencing Instructional Resources: 5.1 Intro	**4.1** Experiencing Instructional Resources: 5.1
1.2 The Course Framework	**2.2** Experiencing Instructional Resources: 2.1-B	**3.2** Pre-AP WHG Assessment Suite	**4.2** Teacher's Perspective

Audience	• Course teachers or instructional coaches *new* to Pre-AP • Participants: 5 minimum, 28 maximum per room
Delivery	• In person • Privately ordered by school or district
Duration	Four consecutive days
Availability	• Institutes begin June 1, 2025 • Ordering begins January 25, 2025

Price	• Members: $9,500 per institute. • Nonmembers: $11,000 per institute. Membership is based on an annual fee paid by your institution. Find the membership status of your institution here: Home -- Membership | College Board. *One free Pre-AP Leadership Workshop is available with the purchase of two or more in-person Pre-AP Summer Institutes. If you would like to take advantage of this offer, please order all three services using the order form. Discount will be applied in quotes, contracts, and invoices.*
Continuing Education Units (CEUs)	2.4
Course Audit required	Yes

Participant Feedback



Need an agenda? Use the following printable PDF versions.

PDF

Pre-APSI Agendas at a Glance.pdf
367.6 KB

Private Pre-AP Professional Learning Order Form

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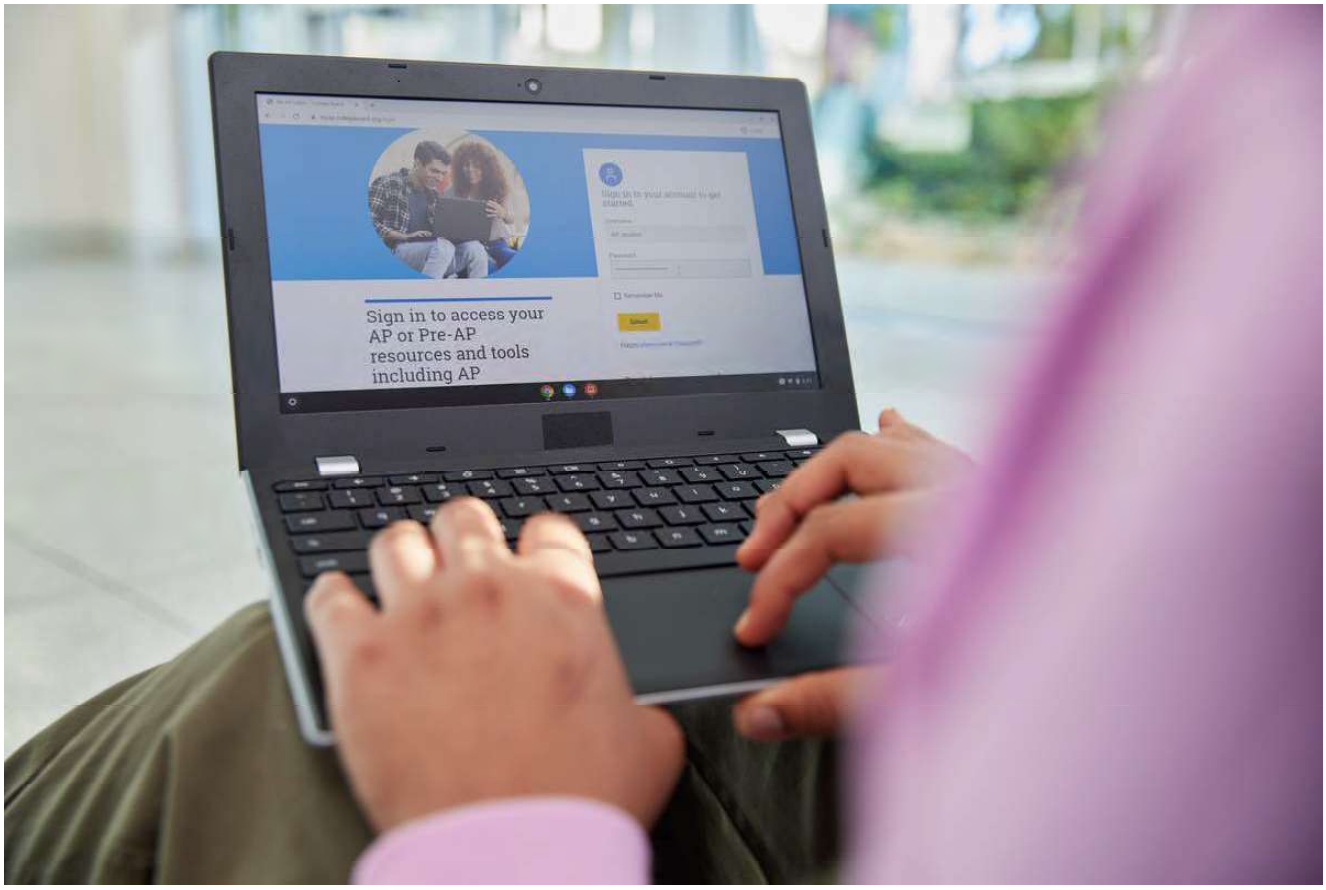
PRIVATE ORDER

Public Pre-AP Course Professional Learning Registration

Peruse the calendar for public teacher and leader events and register for a service.

PUBLIC CALENDAR

2. Online Foundational Modules



Purpose

The Online Foundational Module Series supports teachers as they prepare to build their Pre-AP courses. These best in-class, on-demand online modules take teachers through a course-specific series that highlights best practices for teaching Pre-AP. The series is designed around the most pressing questions asked by teachers new to Pre-AP. Once educators complete the series, they can use it as a reference tool throughout the school year.

Objectives

- Explore the Pre-AP Program Approach to Teaching and Learning, including the course framework, focused content, and formative assessments.
- Navigate and experience Pre-AP instructional resources to help you build your course.
- Synthesize and plan for your course.

Module Topics
• Welcome to Pre-AP • Exploring Your Course Framework and Areas of Focus • The Power of Shared Principles • Introduction to Pre-AP Instructional Resources • Exploring Model Lessons • Pre-AP Assessment Opportunities • Assessments for Learning • Building Your Course

Audience	Course teachers or instructional coaches *new* to Pre-AP
Delivery	Virtual, asynchronous
Duration	12—20 hours
Availability	On-demand on Pre-AP Classroom starting May 1, 2025
Price	Free with the purchase of Pre-AP courses
Continuing Education Units (CEUs)	1.6
Course Audit Required	Yes

Preview the Online Foundational Module Series with a clip from "The Power of the Shared Principles."

Participant Feedback



3. Virtual Pre-AP Summer Institutes

Individually register on the public calendar or order privately for your school.



Purpose

Virtual Pre-AP Summer Institutes provide comprehensive professional learning **for teachers *new* to Pre-AP courses**. Virtual institutes follow a **flipped classroom model**. Participants complete portions of the Online Foundational Module Series prior to each class. They complete Draft and Design tasks embedded in the modules to share with their cohort. Participants gain new skills and insights with supportive feedback from their peer network and expert National Faculty. Time outside of class is required to earn the qualified continuing education units (CEUs).

Objectives

- Examine the Pre-AP Approach to Teaching and Learning using the Online Foundational Module Series.
- Draft and design lessons that apply knowledge about the course framework.
- Collaborate and share feedback about Pre-AP lessons that meet the needs of all learners.

Audience	• Course teachers *new* to Pre-AP • Compared to the in-person Pre-APSI, *caters to more independent learners* • Participants: 5 minimum, 28 maximum
Delivery	• Virtual asynchronous and synchronous • Flipped classroom model • Register for designated times or order privately for a school or district
Duration	Hybrid experience of asynchronous and synchronous learning: • Asynchronous completion of the Online Foundational Module Series (12-20 hours) • Completion of draft and design tasks (~4 hours) • 4 synchronous 2-hour classes (8 hours)
Availability	• Institutes begin June 1, 2025 • Ordering and registration opens March 1, 2025

Price	• $175 per person for public institutes • $3,680 per private institute for members; $4,200 non-members Membership is based on an annual fee paid by your institution Find the membership status of your institution here: Home -- Membership I College Board
Continuing Education Units (CEUs)	• 1.6 for completion of Online Foundational Modules • 0.8 for 4, 2-hour classes • 2.4 total
Course Audit Required	Yes

Participant Feedback

"I loved the collaboration portion of this workshop. I received a lot of valuable feedback and ideas based on what everyone was sharing."

"This workshop was super helpful to get me prepared to teacher Pre-AP English 2."

"[My facilitator] was awesome! This was a really rigorous and productive training."

"I enjoyed hearing the perspectives and advice of other teachers. I also enjoyed the work time and how this was broken up."

"Very engaging and it was fun to connect with other teachers in different states."

"This format really allowed us to engage with each other in a productive and positive way. The cohort seemed genuinely engaged with the conversation and able to build off of one another's work and experience."

Need an agenda? Use the following printable PDF version.

PDF

Virtual Pre-APSI Syllabus 2025.pdf
190.8 KB

Private Pre-AP Professional Learning Order Form

Complete the form to order a private teacher or leader service, or request a quote for your school or district.

PRIVATE ORDER

Public Pre-AP Course Professional Learning Registration

Peruse the calendar for public teacher and leader events and register for a service.

PUBLIC CALENDAR

4. Pre-AP Online Scoring Modules



Purpose

The online scoring modules focus on examining and scoring student work for Pre-AP performance tasks. Participants first analyze a performance task and scoring guidelines. Then they interactively practice scoring student work samples and consider how to generate feedback based upon performance trends.

Each course includes at least three scoring modules (except for Pre-AP Visual and Performing Arts, which has one), and each scoring module can be completed in 1-2 hours. We encourage teachers to complete all the scoring modules in advance of administering the associated performance task.

Objectives

- Analyze what the performance tasks are asking students to do and what the scores represent.
- Examine the merits of formative assessment and emphasizing feedback for students.

- Practice scoring a student sample with feedback and rationales generated from a professional learning community.

Audience	Pre-AP course teachers or instructional coaches
Delivery	Virtual, asynchronous
Duration	1-2 hours per unit
Availability	On-demand on Pre-AP Classroom
Price	Free with the purchase of Pre-AP courses
Continuing Education Units (CEUs)	0.1 per module
Course Audit required	Yes

Preview the Scoring Modules with a clip from Pre-AP English 2 Unit 2.

Participant Feedback

HOW DID THE MODULE SUPPORT YOUR CONFIDENCE IN ANALYZING STUDENT WORK?	WHAT DID YOU FIND MOST USEFUL ABOUT THIS MODULE?
• "I feel more confident after practicing and comparing my reasoning to that of the team." • "I really enjoyed reading the samples and seeing if my scores aligned!" • "Seeing a student example, and then hearing fellow educators discuss it helped me a lot!" • "Overall I am usually very confident, but now know that I need to slow down my reading and really do a deep dive." • "The student examples were very beneficial and provided concrete models of what student writing should look like."	

HOW DID THE MODULE SUPPORT YOUR CONFIDENCE IN ANALYZING STUDENT WORK?	WHAT DID YOU FIND MOST USEFUL ABOUT THIS MODULE?

- "I liked how the collaborative approach showed that there is room for more than one interpretation of a score; it is important to have that discussion and come to a consensus when able."
- "I found it useful to grade myself and then compare with others and listen to each person's reasoning."
- "Student feedback was the most useful. This is a layer that is not part of my scoring experience."
- "Good to get us all on the same page and looking deeper at the guidelines."
- "Seeing the beauty in both responses."

Comparison Analysis

Building the Foundation for Teachers NEW to Pre-AP Courses At a Glance

	In-Person Pre-AP Summer Institutes	Online Foundational Modules Series	Virtual Pre-AP Summer Institutes	Online Scoring Modules
Audience	• Course teachers or instructional coaches *new* to Pre-AP • Participants: 5 minimum, 28 maximum per institute	Pre-AP course teachers or instructional coaches	• Course teachers or instructional coaches *new* to Pre-AP • Compared to the in-person Pre-APSI *caters to more independent learners* • Participants: 5 minimum, 28	Pre-AP course teachers or instructional coaches

			maximum	
Delivery	• In person • Privately ordered by school or district	Virtual, asynchronous	• Virtual asynchronous and synchronous • Flipped classroom model • Register for designated times or order privately for a school or district	Virtual, asynchronous
Duration	4 consecutive days	12-20 hours	• *Asynchronous* Online Foundational Modules; • Completion of draft and design tasks (12-20 hours); • Four *synchronous* 2-hour classes (8 hours)	1-2 hours per unit
Availability	• Institutes begin June 1, 2025 • Ordering begins January 25, 2025	On-demand on Pre-AP Classroom starting May 1, 2025	• Institutes begin June 1, 2025 • Ordering and registration begin March 1, 2025	On-demand on Pre-AP Classroom starting May 1, 2025

Price	• Members: $9,500 per institute • Nonmembers: $11,000 per institute	Free with the purchase of Pre-AP courses	• $175 per person for public events • Members: $3,680 per private event; • Nonmembers: $4,200	Free with the purchase of Pre-AP courses
Continuing Education Units (CEUs)	2.4	1.6	2.4	0.1 per module
Course Audit Required	Yes	Yes	Yes	Yes

PDF **Building the Foundation for Teachers at a Glance 2025.pdf**
104.9 KB

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Peruse the calendar for public teacher and leader events and register for a service.

PUBLIC CALENDAR



Thank you!

Use the continue bar below to learn more about Pre-AP professional learning for leaders.

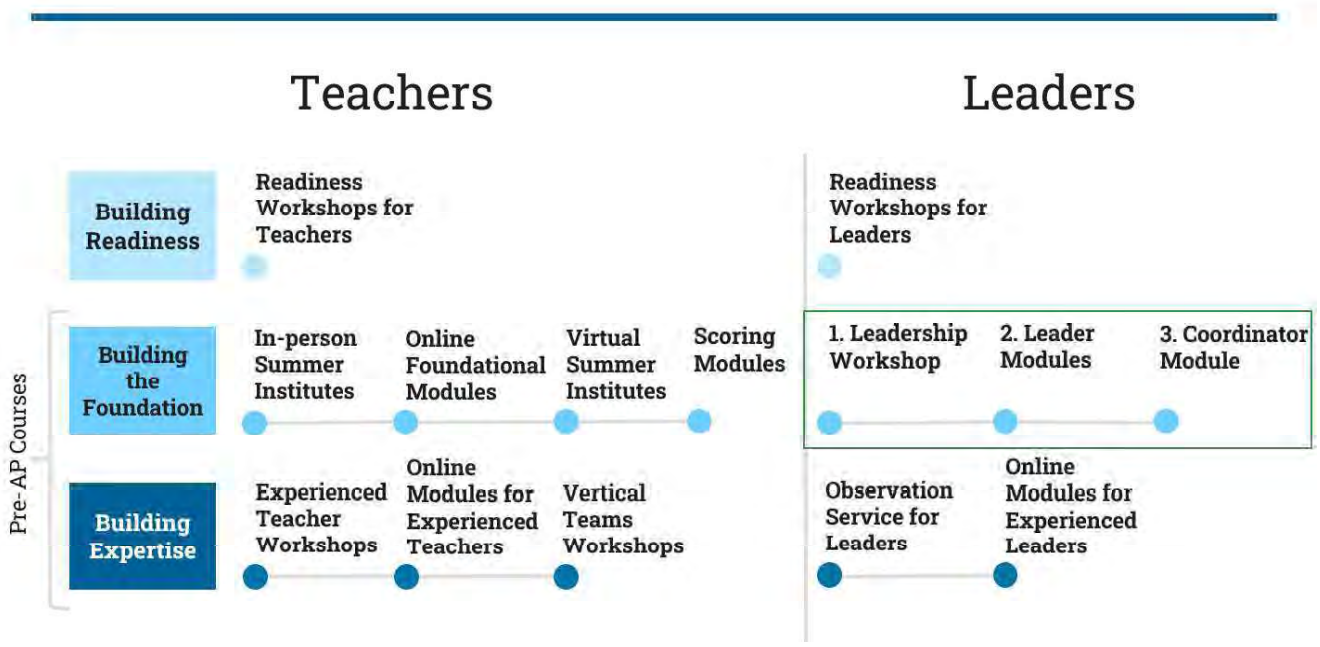
CONTINUE TO BUILDING THE FOUNDATION FOR LEADERS NEW TO PRE-AP

Building the Foundation for Leaders New to Pre-AP Courses

Pre-AP Professional Learning:

Building the Foundation for Leaders

Created for leaders and coordinators *new* to Pre-AP courses.



1. Leadership Workshop



Purpose

In this workshop, Pre-AP leaders explore the best practices and resources to support their implementation. The focus is on the completing professional learning, following course frameworks, administering assessments, and offering Pre-AP for all.

Pre-AP administrators include anyone at the site or district level supporting the implementation of the Pre-AP Program. This may include district-level leaders, principals, instructional coaches, and counselors, in addition to the Pre-AP coordinator.

Objectives

- Articulate the impact they want Pre-AP to have on their students.
- Understand how the professional learning fosters ongoing teacher development.
- Explore how the Pre-AP shared principles support effective instruction and encourage cross-content collaboration.
- Investigate Pre-AP course frameworks and corresponding instructional resources and how to use them in conjunction with their local curriculum.
- Understand how to monitor and support expectations for assessments.
- Identify common barriers to Pre-AP success, and explore resources to support building stakeholder and community buy-in for their Pre-AP for All program.

Audience	• School- and district-level administrators, including instructional coaches • Participants: 5 minimum, 28 maximum
Delivery	• In person • Virtual
Duration	• One day for in-person, Day 4 of Pre-AP Summer Institute for teachers • Three hours for virtual/synchronous
Availability	• Throughout the year • Order at least 60 days in advance

Price	• Virtual: $175 per person for public virtual events. • Members: $4,600 per private workshop, in-person workshop or $2,500 per private, virtual workshop. • Nonmembers: $5,250 per private, in-person workshop or $2,850 per private, virtual workshop. Membership is based on an annual fee paid by your institution. Find the membership status of your institution here: Home -- Membership	College Board. *One free Pre-AP Leadership Workshop is available with the purpose of two or more in-person Pre-AP Summer Institutes. If you would like to take advantage of this offer, please order all three services using the order form. Discount will be applied in quotes, contracts, and invoices.*
Continuing Education Units (CEUs)	• In person: 0.6 • Virtual: 0.3
Course Audit required	Yes

Participant Feedback

"This session was thorough and informative and will be beneficial to creating a shared instructional vision for my school."

"Just what we needed to get rolling!"

"I appreciated that we had opportunities to get the information, digest, discuss, and get clarification on concerns/questions. We received great information as well as next steps to support the development of the program in our school."

"I appreciate the thoroughness of the content session and the facilitator. We were always engaged, and [our facilitator] always checked to see if we understood what was taught, and we were also able to have great whole group and small group discussions that helped our understanding as well.

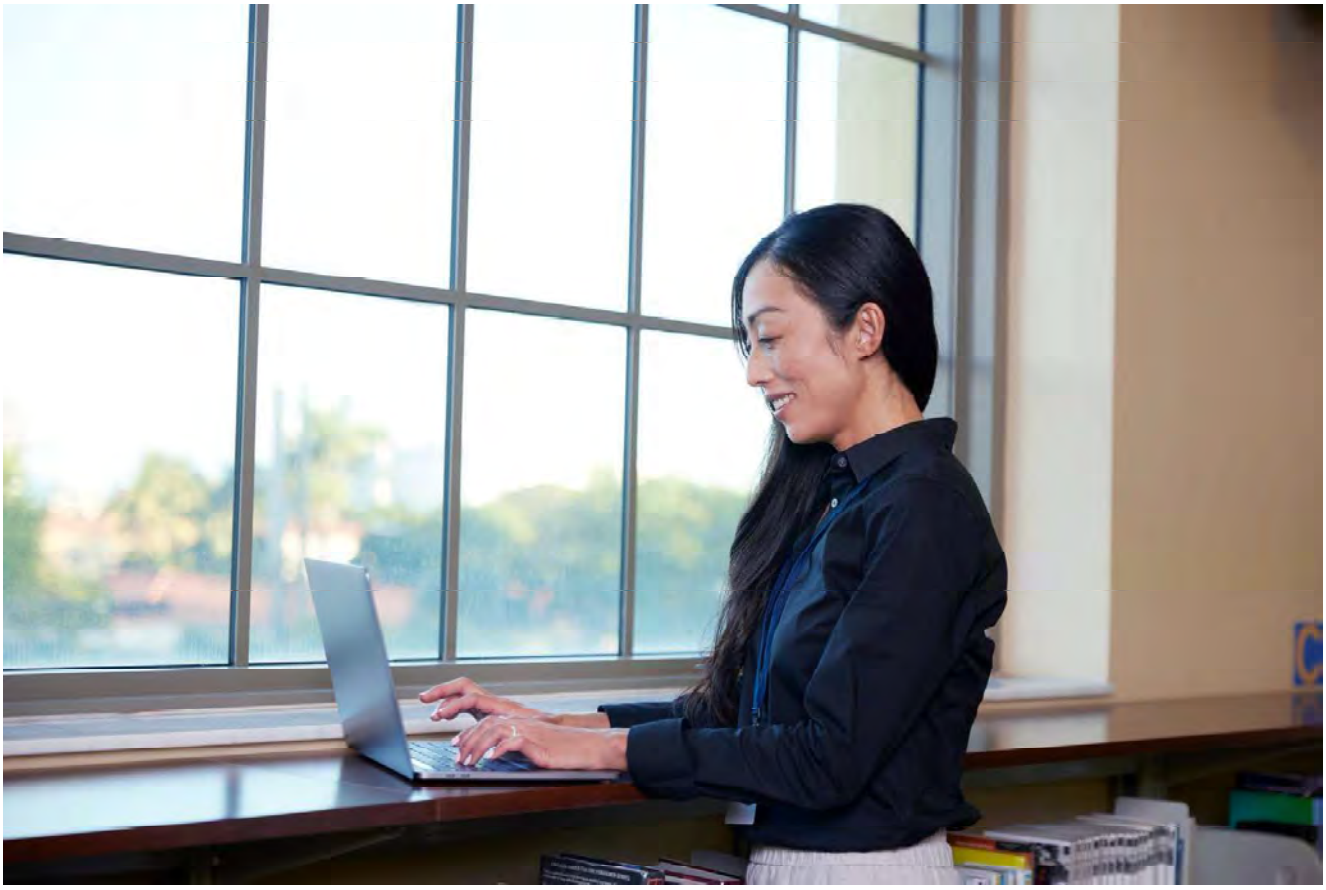
"Both facilitators were very knowledgeable. Allowed us appropriate time to process and delve into the resources presented."

"Thoughtful and relevant."

Need an agenda? Use the following printable PDF versions.

PDF **Pre-AP Leadership Workshop.pdf**
359.2 KB

2. Leader Modules



Purpose

The Pre-AP Foundational Module Series helps familiarize school and district leaders with the Pre-AP Program design and priorities.

Objectives

- Internalize the attributes of the Pre-AP Program, its approach to teaching and learning, and commitments.
- Explore the interdisciplinary Pre-AP shared principles, observe a model lesson, and envision the potential impact on students and teachers.
- Explore Pre-AP best practices and resources to support a successful school-wide implementation.

Module Topics
• Leadership Opening • Welcome to Pre-AP • Pre-AP Program Priorities • The Power of Shared Principles • Pre-AP Leadership Practices

Audience	School and/or district leaders new to the Pre-AP Program
Delivery	Virtual, asynchronous
Duration	4—6 hours
Availability	On-demand on Pre-AP Classroom
Price	Free with the purchase of Pre-AP courses
Continuing Education Units (CEUs)	0.6
Course Audit required	Yes

Use the following video for a glimpse into the Online Foundational Module Series. This clip is from "The Power of the Shared Principles."

Participant Feedback



3,257

Completed e-learning modules

4.9

Average module satisfaction rating out of 5 stars

3. Coordinator Module



Purpose

The Pre-AP coordinator completes the Online Coordinator Module prior to the start of the school year. The module supports the current Pre-AP coordinator of a Pre-AP school. It is recommended that coordinators complete this module prior to the start of the school year, so the coordinators can support the management of the program, including teacher and student onboarding.

Objective

- Determine how to support the most critical aspects of the program's launch and implementation, including access and onboarding.

Module Topics
• Introduction: Why This Matters • Establishing Your Pre-AP Team • Authorizing Pre-AP Courses • Accessing Pre-AP Classroom Resources and Reporting • Getting All Students into Pre-AP Classroom • Growing Teachers and Leaders through Professional Learning • Staying On Track This Year

Audience	Pre-AP Coordinators
Delivery	Virtual, asynchronous
Duration	~1 hour
Availability	On-demand on Pre-AP Classroom Recommended before the start of the school year

Price	Free with the purchase of Pre-AP courses
Continuing Education Units (CEUs)	0.1
Course Audit Required	Yes

Comparison Analysis

Building the Foundation for Leaders of Pre-AP Courses

	Leadership Workshop	**Leader Modules**	**Coordinator Module**
Audience	• School and/or district leaders at Pre-AP schools • Minimum 5, maximum 28 participants	School and/or district leaders new to the Pre-AP Program	Pre-AP Coordinators
Delivery	• In-person • Virtual, synchronous	Virtual, synchronous	Virtual, asynchronous

Duration	One day for in person 3 hours for virtual, synchronous	4—6 hours	~1 hour
Availability	• Throughout the year • Order 60 days in advance	On-demand on Pre-AP Classroom beginning May 1, 2025	On-demand on Pre-AP Classroom beginning May 1, 2025
Price	• $250 per participant for public in-person events • $175 per participant for public virtual events • Members: $4,600 per private customized workshop • Nonmembers: $5,250 per private workshop	Free with the purchase of Pre-AP courses	Free with the purchase of Pre-AP courses
Continuing Education Units (CEUs)	• In-person: 0.6 • Virtual: 0.3	0.6	0.1
Course Audit Required	Yes	Yes	Yes

PDF

Building the Foundation for Leaders at a Glance 2025.pdf
108.9 KB

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Peruse the calendar for public teacher and leader events and register for a service.

PUBLIC CALENDAR

Thank you!

Use the Continue bar below to learn more about Pre-AP Professional Learning that follows the foundation and builds expertise.

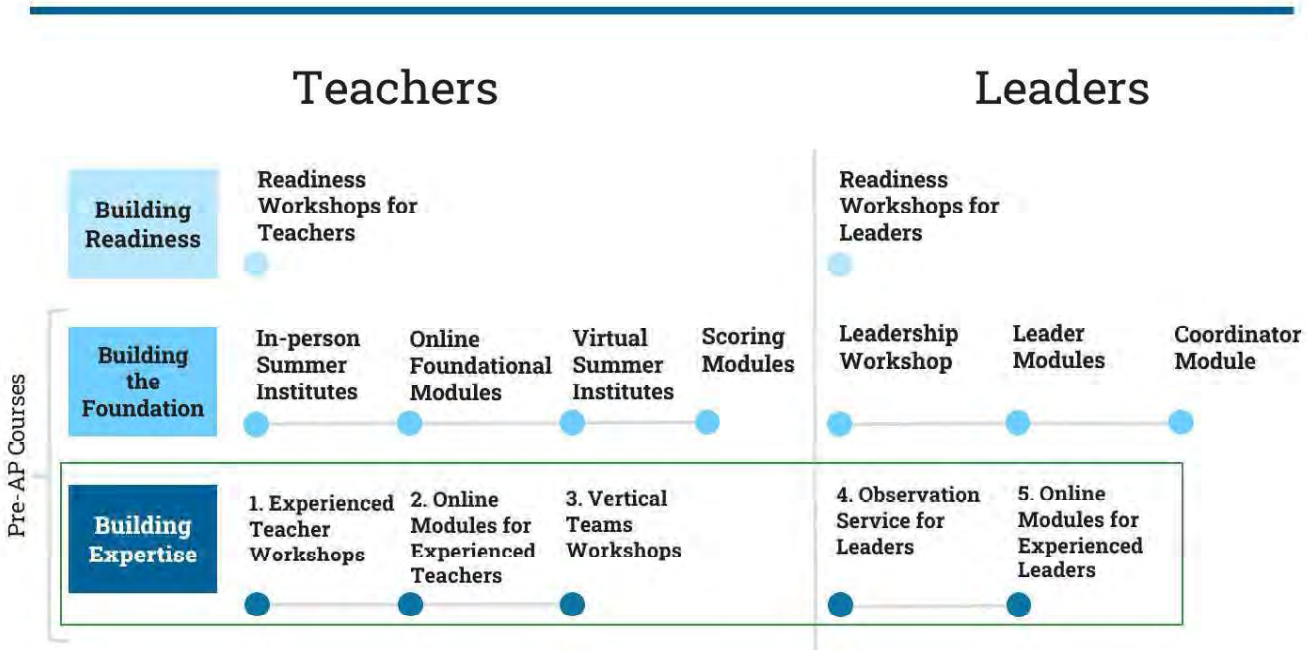
CONTINUE TO BUILDING EXPERTISE FOR COURSE EDUCATORS

Lesson 5 of 7

Building Expertise for Educators Experienced with Pre-AP Courses

Pre-AP Professional Learning: Building Expertise

Created for *course teachers and leaders* who have completed Pre-AP Course Foundational Professional Learning.



1. Experienced Pre-AP Teacher Workshops



Purpose

The Experienced Pre-AP Teacher Workshops reinforce key Pre-AP Program ideas and support teachers as they refine their courses and instructional practices. These one-day professional learning workshops offer ready-to-try ideas and interactions inspired by feedback from Pre-AP teachers.

Objectives

- Revisit and reflect upon Pre-AP classroom instructional experiences and priorities.
- Connect Pre-AP shared principles and disciplinary areas of focus to instructional resources and classroom instruction.
- Collaborate and design lessons for all students using the Pre-AP Approach to Teaching and Learning.

- Grow your confidence as an experienced Pre-AP teacher and lesson designer.

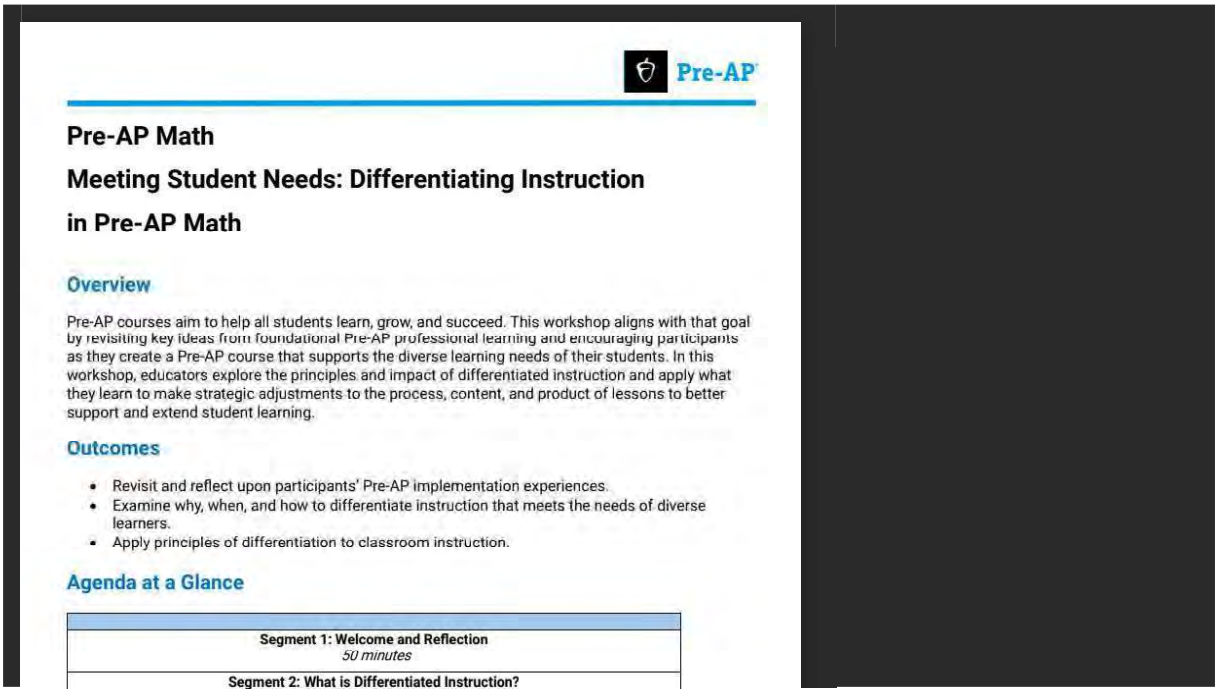
Pre-AP Experienced Teacher Workshop Offerings

Use the plus sign (+) to learn more about the Pre-AP Experienced Teacher Workshops available in each discipline, including titles, foci, objectives, and sample agendas.

Pre-AP Algebra 1, Geometry with Statistics, Algebra 2

Meeting Student Needs: Differentiating Instruction in Pre-AP Math

Overview:
Pre-AP courses aim to help all students learn, grow, and succeed. This workshop aligns with that goal by revisiting key ideas from foundational Pre-AP professional learning and encouraging participants as they create a Pre-AP course that supports the diverse learning needs of their students. In this workshop, educators explore the principles and impact of differentiated instruction and apply what they learn to make strategic adjustments to the process, content, and product of lessons to better support and extend student learning.



Pre-AP

Pre-AP Math

Meeting Student Needs: Differentiating Instruction in Pre-AP Math

Overview

Pre-AP courses aim to help all students learn, grow, and succeed. This workshop aligns with that goal by revisiting key ideas from foundational Pre-AP professional learning and encouraging participants as they create a Pre-AP course that supports the diverse learning needs of their students. In this workshop, educators explore the principles and impact of differentiated instruction and apply what they learn to make strategic adjustments to the process, content, and product of lessons to better support and extend student learning.

Outcomes

- Revisit and reflect upon participants' Pre-AP implementation experiences.
- Examine why, when, and how to differentiate instruction that meets the needs of diverse learners.
- Apply principles of differentiation to classroom instruction.

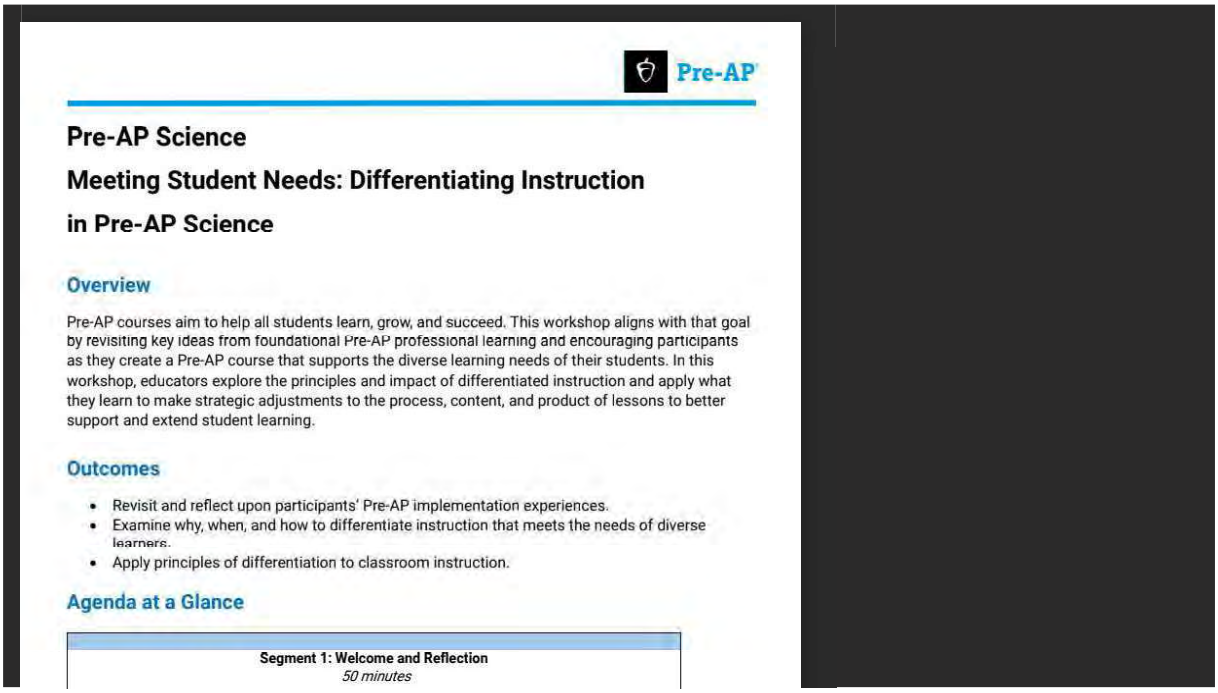
Agenda at a Glance

Segment 1: Welcome and Reflection *50 minutes*
Segment 2: What is Differentiated Instruction?

Pre-AP Biology, Chemistry

Meeting Student Needs: Differentiating Instruction in Pre-AP Science

Overview:
Pre-AP courses aim to help all students learn, grow, and succeed. This workshop aligns with that goal by revisiting key ideas from foundational Pre-AP professional learning and encouraging participants as they create a Pre-AP course that supports the diverse learning needs of their students. In this workshop, educators explore the principles and impact of differentiated instruction and apply what they learn to make strategic adjustments to the process, content, and product of lessons to better support and extend student learning.



Pre-AP English 1, English 2

Two workshops are available for experienced Pre-AP teachers. No recommended order.

Offering 1: A New Palette of Possibilities: Experienced Teacher Lesson Development Using AI Tools

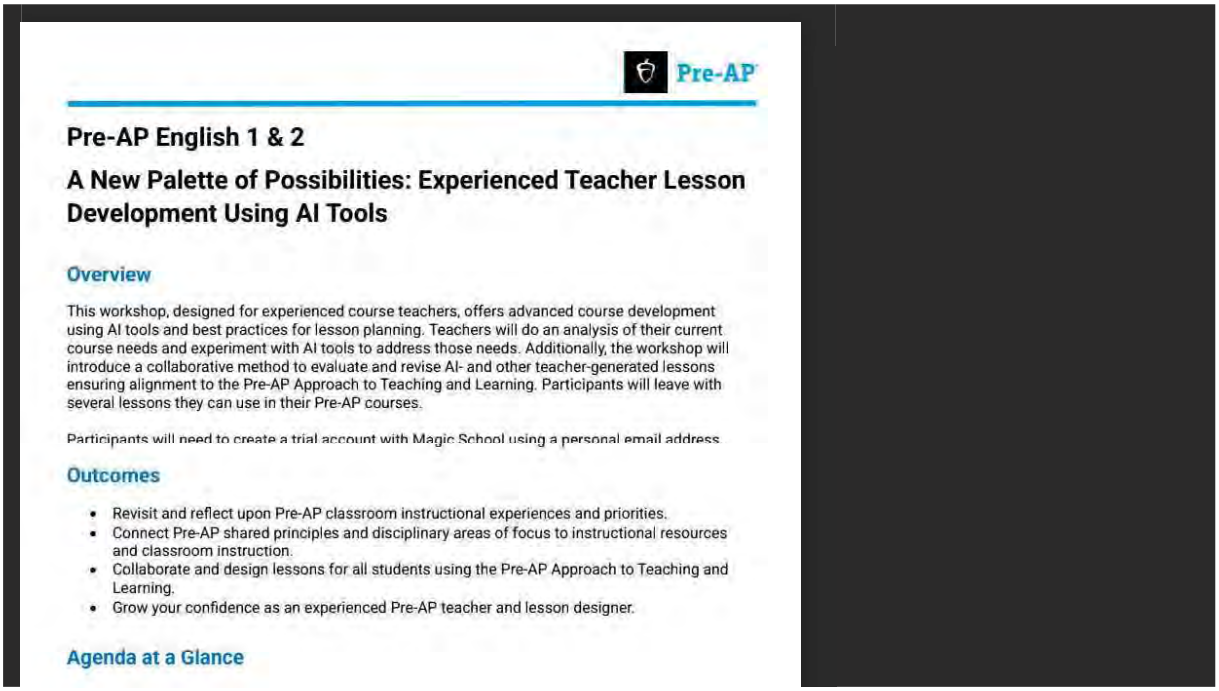
Overview:
This workshop, designed for experienced course teachers, offers advanced course development using AI tools and best practices for lesson planning. Teachers will do an analysis of their current course needs and experiment with AI tools to address those needs. Additionally, the workshop will introduce a collaborative method to evaluate and revise AI- and other teacher-generated lessons ensuring alignment to the Pre-AP Approach to Teaching and Learning. Participants will leave with several lessons they can use in their Pre-AP courses.

Participants will need to create a trial account with Magic School using a personal email address.

Offering 2: Practice in Perspectives: Experienced Teacher Strategies for Building Synthesis

Overview:
The Pre-AP English courses introduce students to synthesis—the consideration, explanation, and integration of others' arguments into one's own argument. Through a scaffolded approach, students build a foundation for complex thinking and for communicating ideas clearly. Students improve

their synthesis skills starting with smaller text-based analytical tasks while learning to manage more and more points of view. By first concentrating on strategies like storyboarding and conversation circles, participants in this workshop learn how to help students acquire strong skills they can later use with essays and other types of writing.

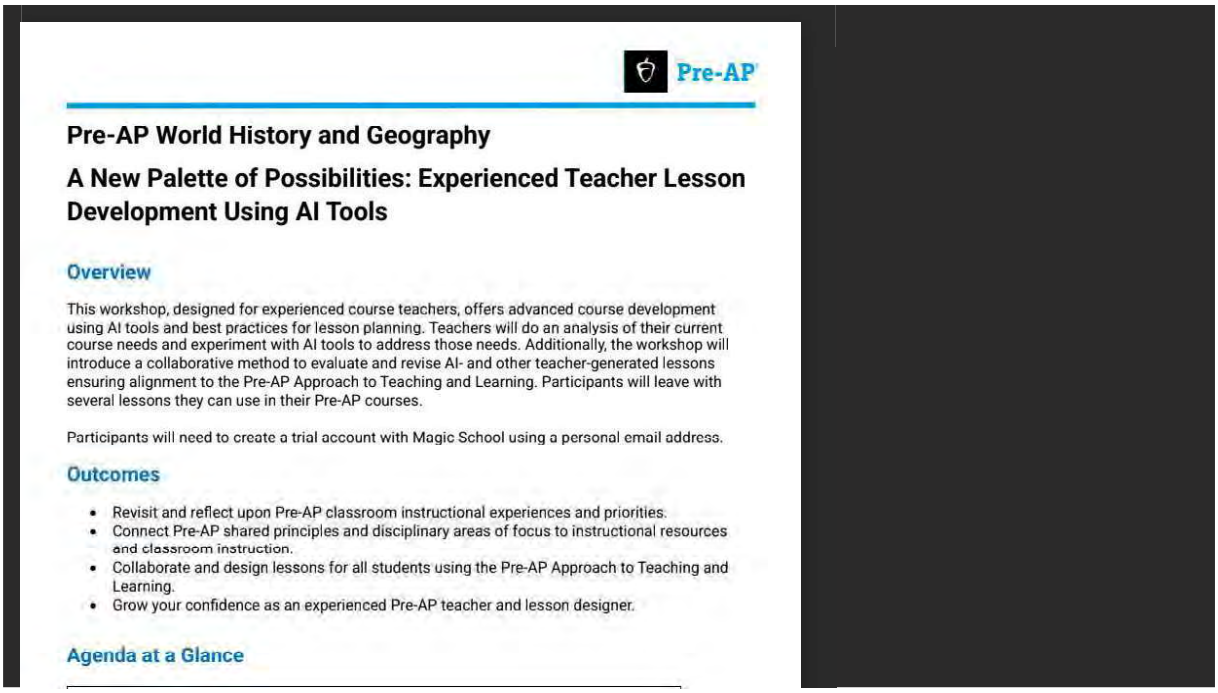


Pre-AP World History and Geography _

A New Palette of Possibilities: Experienced Teacher Lesson Development Using AI Tools

Overview:
This workshop, designed for experienced course teachers, offers advanced course development using AI tools and best practices for lesson planning. Teachers will do an analysis of their current course needs and experiment with AI tools to address those needs. Additionally, the workshop will introduce a collaborative method to evaluate and revise AI- and other teacher-generated lessons ensuring alignment to the Pre-AP Approach to Teaching and Learning. Participants will leave with several lessons they can use in their Pre-AP courses.

Participants will need to create a trial account with Magic School using a personal email address.



Pre-AP

Pre-AP World History and Geography

A New Palette of Possibilities: Experienced Teacher Lesson Development Using AI Tools

Overview

This workshop, designed for experienced course teachers, offers advanced course development using AI tools and best practices for lesson planning. Teachers will do an analysis of their current course needs and experiment with AI tools to address those needs. Additionally, the workshop will introduce a collaborative method to evaluate and revise AI- and other teacher-generated lessons ensuring alignment to the Pre-AP Approach to Teaching and Learning. Participants will leave with several lessons they can use in their Pre-AP courses.

Participants will need to create a trial account with Magic School using a personal email address.

Outcomes

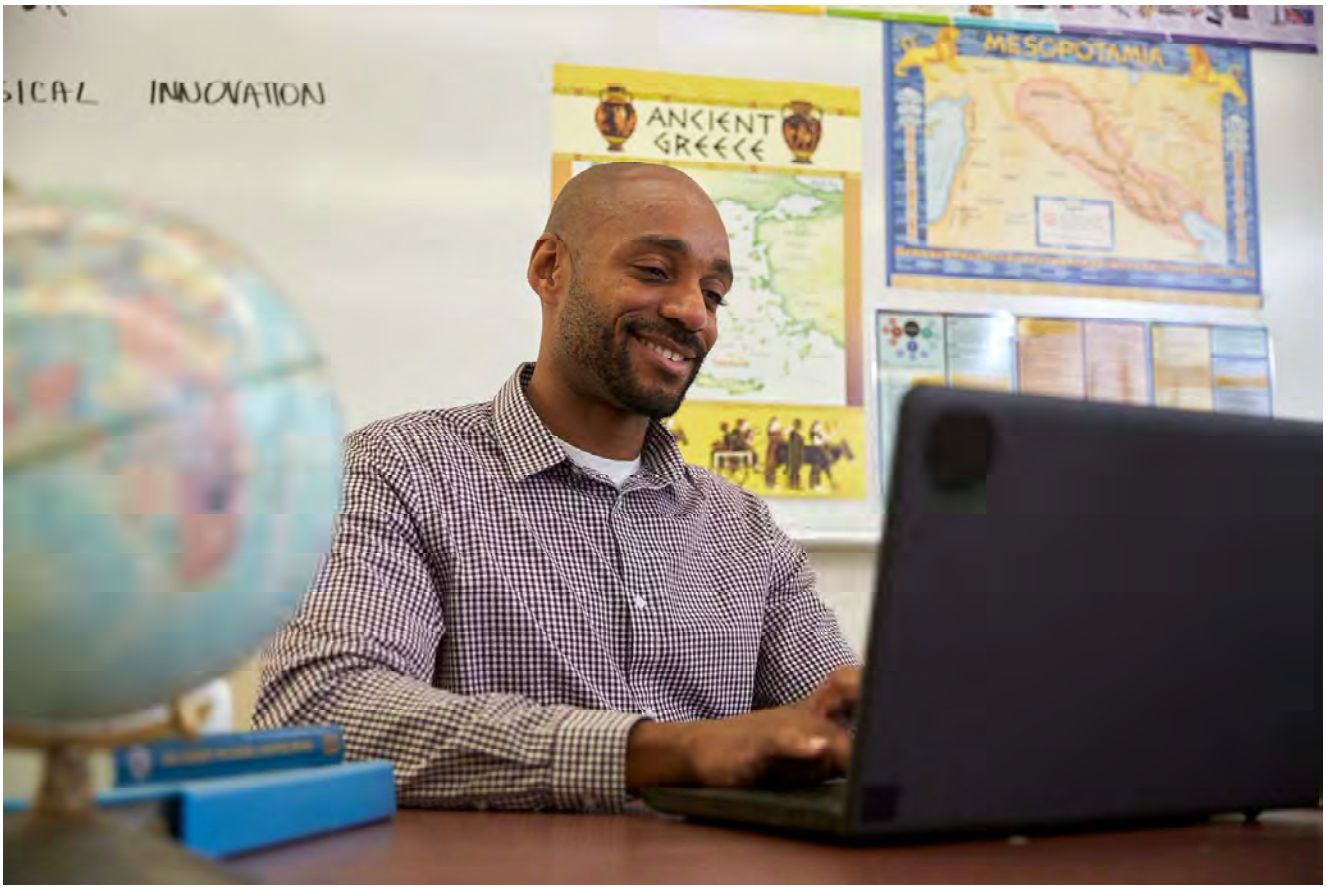
- Revisit and reflect upon Pre-AP classroom instructional experiences and priorities.
- Connect Pre-AP shared principles and disciplinary areas of focus to instructional resources and classroom instruction.
- Collaborate and design lessons for all students using the Pre-AP Approach to Teaching and Learning.
- Grow your confidence as an experienced Pre-AP teacher and lesson designer.

Agenda at a Glance

Audience	Pre-AP course teachers and instructional coaches who have completed Pre-AP foundational professional learning
Delivery	In person
Duration	One day
Availability	• Private purchase by school, district, or state • Available throughout the year • Order required *at least* 60 days in advance
Price	• Members: $4,600.

	• Nonmembers: $5,250. Membership is based on an annual fee paid by your institution. Find the membership status of your institution here: Home -- Membership I College Board
Continuing Education Units (CEUs)	0.6
Course Audit required	Yes

2. Online Modules for Experienced Pre-AP Teachers



Purpose

The Experienced Teacher Online Modules reinforce key Pre-AP Program ideas and support teachers as they continue to refine their courses and instructional practices. These quick-hitting professional learning modules offer ready-to-try ideas and interactions inspired by feedback from Pre-AP teachers.

Objectives

- Analyze opportunities to build students' success in a Pre-AP course.
- Explore professional resources and readings to support your practice.
- Practice protocols that address specific implementation challenges and opportunities.

Module Topics
• Introduction: Experienced Pre-AP Teacher Support • **Plan**: Meeting Learners' Needs by Differentiating Instruction • **Plan**: Personalizing Instruction with Intention • **Teach**: Activating Student Voices • **Teach**: Empowering English Learners • **Assess & Reflect**: Assessment for Learning

Audience	Pre-AP course teachers and instructional coaches who have completed Pre-AP foundational professional learning
Delivery	Virtual, asynchronous

Duration	~1 hour per module
Availability	On-demand on Pre-AP Classroom, starting May 1, 2025
Price	Free with purchase of Pre-AP
Continuing Education Units (CEUs)	0.1 per module
Course Audit Required	Yes

Participant Feedback



3. Vertical Teams Workshops



Purpose

These workshops bring teachers and instructional leaders from different courses and grade levels together to capture the momentum of grade 9 Pre-AP lessons and skills, and ease the continuum of learning for students. By working as a vertical team, educators create a path for students that offers more opportunities and success in higher-level academic work, including AP.

Available in May 2025

Objectives

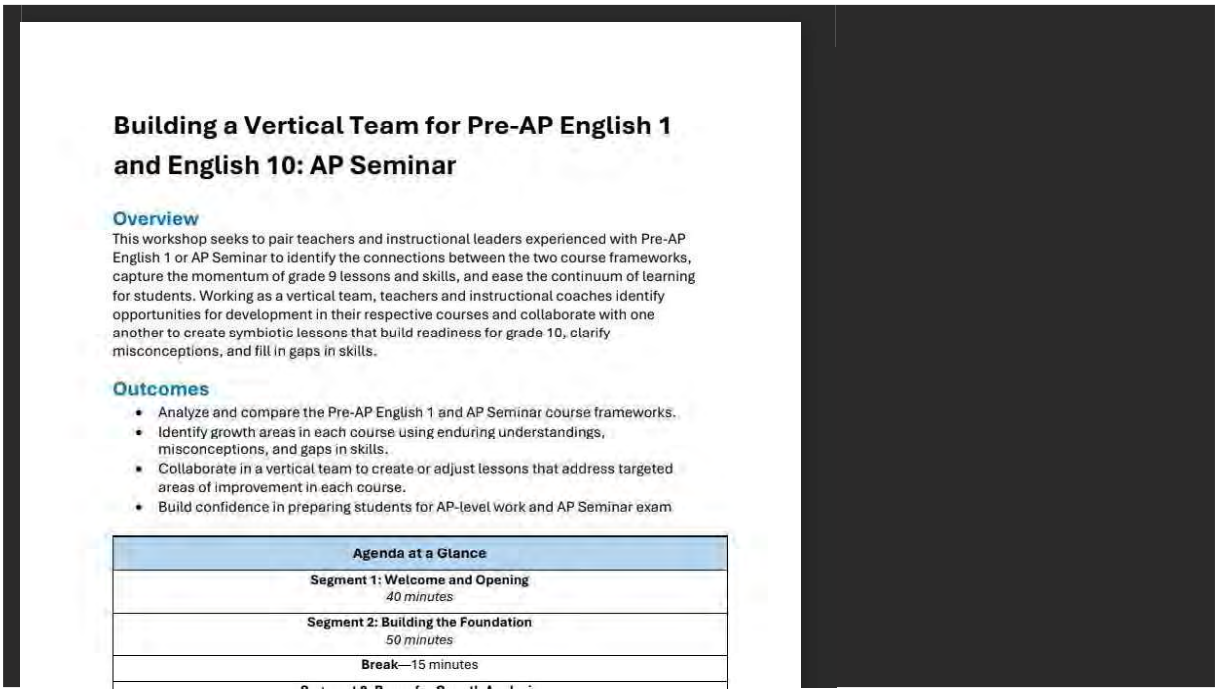
- Analyze and compare course frameworks.
- Identify areas for opportunity and growth between and among courses.
- Collaborate in a vertical team to create or adjust lessons that ease the continuum of learning for students.

- Build confidence in preparing students for AP-level work.

Vertical Teams Workshops

Use the plus sign (+) to learn more about the Vertical Teams Workshops available in English and Math, including the titles, overviews, outcomes, and sample agendas:

Building a Vertical Team for Pre-AP English 1 and English 10: AP Seminar



Building a Vertical Team for Pre-AP English 1 and English 10: AP Seminar

Overview

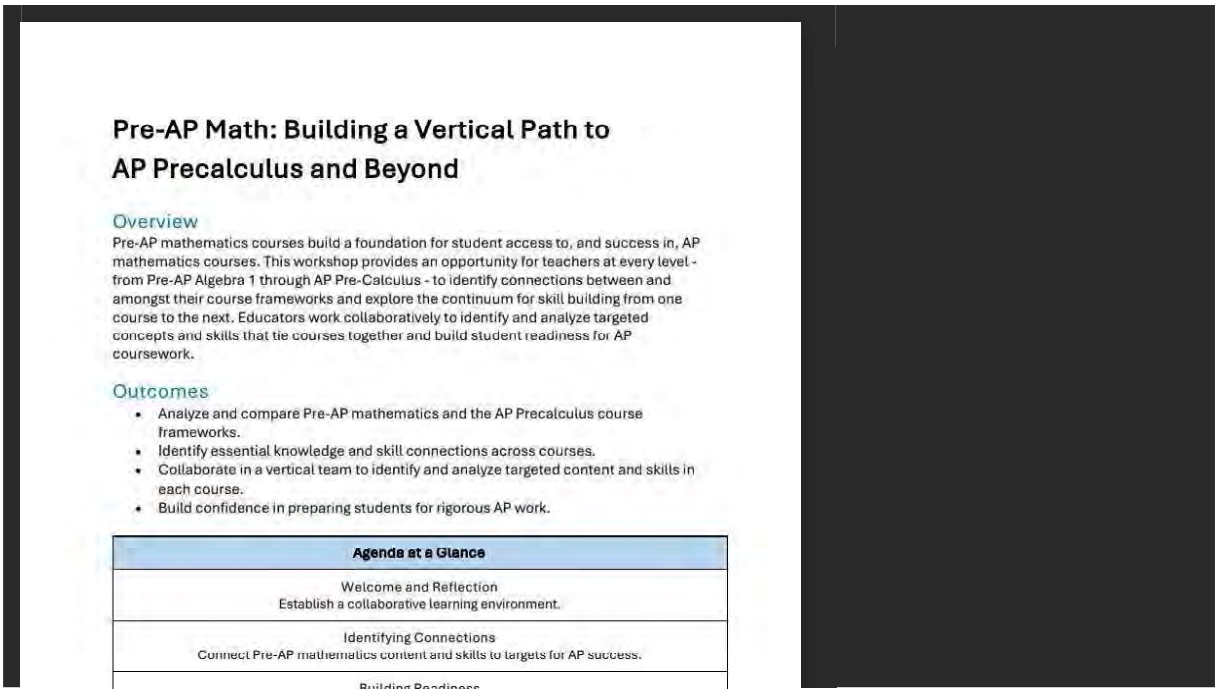
This workshop seeks to pair teachers and instructional leaders experienced with Pre-AP English 1 or AP Seminar to identify the connections between the two course frameworks, capture the momentum of grade 9 lessons and skills, and ease the continuum of learning for students. Working as a vertical team, teachers and instructional coaches identify opportunities for development in their respective courses and collaborate with one another to create symbiotic lessons that build readiness for grade 10, clarify misconceptions, and fill in gaps in skills.

Outcomes

- Analyze and compare the Pre-AP English 1 and AP Seminar course frameworks.
- Identify growth areas in each course using enduring understandings, misconceptions, and gaps in skills.
- Collaborate in a vertical team to create or adjust lessons that address targeted areas of improvement in each course.
- Build confidence in preparing students for AP-level work and AP Seminar exam

Agenda at a Glance
Segment 1: Welcome and Opening *40 minutes*
Segment 2: Building the Foundation *50 minutes*
Break—15 minutes

Pre-AP Math: Building a Vertical Path to AP Precalculus and Beyond



Pre-AP Math: Building a Vertical Path to AP Precalculus and Beyond

Overview

Pre-AP mathematics courses build a foundation for student access to, and success in, AP mathematics courses. This workshop provides an opportunity for teachers at every level - from Pre-AP Algebra 1 through AP Pre-Calculus - to identify connections between and amongst their course frameworks and explore the continuum for skill building from one course to the next. Educators work collaboratively to identify and analyze targeted concepts and skills that tie courses together and build student readiness for AP coursework.

Outcomes

- Analyze and compare Pre-AP mathematics and the AP Precalculus course frameworks.
- Identify essential knowledge and skill connections across courses.
- Collaborate in a vertical team to identify and analyze targeted content and skills in each course.
- Build confidence in preparing students for rigorous AP work.

Agenda at a Glance
Welcome and Reflection Establish a collaborative learning environment.
Identifying Connections Connect Pre-AP mathematics content and skills to targets for AP success.
Building Readiness

Audience	Pre-AP and AP course teachers and instructional coaches who have completed foundational professional learning
Delivery	In person
Duration	One day
Availability	Throughout the school year
Price	• Members: $4,600. • Nonmembers: $5,250. Membership is based on an annual fee paid by your institution. Find the membership status of your institution here: Home -- Membership | College Board.

Continuing Education Units (CEUs)	0.6
Course Audit Required	No

4. Observation Service



Purpose

This observation service allows leaders to walk alongside Pre-AP experts, observing and debriefing classroom instruction to support and improve implementation.

Objectives

- Observe classroom instruction to assess program implementation using a classroom observation tool.
- Engage in collecting data around content, instruction, and assessment.
- Identify instructional practices of close observation and analysis, higher-order questioning, evidence-based writing, and academic conversation to support access to grade-level content.
- Debrief classroom observations to better align data collection and notice trends.

Audience	Pre-AP school- and district-level administrators implementing Pre-AP and/or specific content coaches seeking more depth to support AP.
Delivery	In person
Duration	One day
Availability	Throughout the school year
Price	• Members: $4,600. • Nonmembers: $5,250. Membership is based on an annual fee paid by your institution. Find the membership status of your institution here: Home -- Membership | College Board.
Continuing Education Units (CEUs)	None

Course Audit Required	No

Participant Feedback

"I really enjoyed the process and being provided the resources to effectively conduct walk-throughs."

"This will help us as leaders create focus points to work on with our teachers."

"I really enjoyed working with the facilitator. She made us feel confident in completing the task by setting the expectation and then use the evidence to coach teachers."

"[Our director] connected with and understood our school."

"I appreciate the validation that occurs when coaching cycles and the representative feedback align around problems of practice and next steps."

"This gave us a better idea of how we will implement and be on the same page."

PDF

Pre-AP Observation Service.pdf

388.5 KB

5. Online Modules for Experienced Leaders



Purpose

These modules deepen Pre-AP leaders' understanding of the Pre-AP course frameworks and shared principles and how they can be used to support teachers' implementation and inform site decision making.

Objectives

- Deepen your understanding of the Pre-AP course frameworks and explain how the framework components support local curriculum.
- Examine the components of the Pre-AP course frameworks within the context of a Pre-AP course and investigate how this information can assist leaders in supporting planning, instruction, and assessment.
- Explore what the Pre-AP shared principles look like in the classroom and reflect on how they support collaboration across disciplines.

Module Topics
• Exploring Pre-AP Course Frameworks • Applying the Shared Principles

Audience	Pre-AP school- and district-level administrators who have completed Pre-AP foundational professional learning
Delivery	Virtual, asynchronous
Duration	~1 hour per module
Availability	On-demand on Pre-AP Classroom, starting May 1, 2025
Price	Free with purchase of Pre-AP
Continuing Education Units (CEUs)	0.1 per module
Course Audit Required	Yes

Participant Feedback



Comparison Analysis

Building the Expertise for Educators of Pre-AP Courses

	Experienced Teacher Workshops	Online Modules for Experienced Teachers	Vertical Teams Workshops	Observation Service	Online Modules for Experienced Leaders
Audience	Pre-AP course teachers and instructional coaches who have completed foundational professional learning	Pre-AP course teachers and instructional coaches who have completed foundational professional learning	Pre-AP course teachers and instructional coaches who have completed foundational professional learning and AP Seminar or AP Precalculus teachers	Pre-AP school and district-level administrators implementing Pre-AP and/or specific content coaches seeking more depth to support AP	Pre-AP school- and district-level administrators who have completed Pre-AP foundational professional learning
Delivery	In person	Virtual, asynchronous	In person	In person	Virtual, asynchronous
Duration	One day	~1 hour per module	One day	One day	~1 hour per module
Availability	Throughout the school year; order at least 60 days in advance	On-demand on Pre-AP Classroom on May 1, 2025	Throughout the school year; order at least 60 days in advance	Throughout the school year; order at least 60 days in advance	On-demand on Pre-AP Classroom on May 1, 2025

Price	• Members: $4,600 • Nonmembers: $5,250	Free with purchase of Pre-AP	• Members: $4,600 • Nonmembers: $5,250	• Members: $4,600 • Nonmembers: $5,250	Free with purchase of Pre-AP
Continuing Education Units (CEUs)	0.6	0.1 per module 0.6 total	0.6	None	0.1 per module 0.2 total
Course Audit Required	Yes	Yes	No	No	Yes

PDF **Building Expertise for All Educators at a Glance 2025.pdf**
124.6 KB

Private Pre-AP Professional Learning Order Form

Complete the form to order a private teacher or leader service, or request a quote for your school or district.

PRIVATE ORDER

Thank you!

Questions?

Contact the Pre-AP team at
PreAPPL@collegeboard.org

Ordering

Private Pre-AP Professional Learning Order Form

Complete the form to order a private teacher or leader service, or request a quote for your school or district.

PRIVATE ORDER

Public Pre-AP Course Professional Learning Registration

Peruse the calendar for public teacher and leader events and register for a service.

PUBLIC CALENDAR

Resource Library

Pre-AP Professional Learning: Resource Library

Create print resources to share more information about Pre-AP Professional Learning.

Pre-AP Professional Learning Services At a Glance



Flipbook

Flipbook

READ MORE FLIPBOOKPDF >

PDF

Pre-AP Professional Learning Services at a Glance 2025.pdf

288.9 KB

Pre-AP Professional Learning Success Story

PDF

Pre-AP Professional Learning Success Story.pdf

2.1 MB

Terms and Conditions

PDF

Terms and Conditions for Pre-AP Teacher Services.pdf

231.8 KB

Thank you!

Questions?

Contact the Pre-AP team at
PreAPPL@collegeboard.org

Attachment 6

SAT Suite of Assessments

SAT Suite of Assessments

The College Board is proud to offer our college readiness assessments to Knox County Schools. SAT School Day (SAT SD), along with PSAT/NMSQT®, PSAT 10, and PSAT 8/9, provides students and educators with clear indicators of college and career readiness, makes it easy to understand academic strengths and areas of growth, supports course planning, and helps connect students with an array of post-secondary options and opportunities, including scholarships. No other assessment system can provide all the benefits detailed below.

In this proposal, we provide information on College Board's SAT Suite of Assessments.

The SAT

The SAT is the key component to the SAT Suite, an assessment system comprised of the SAT (including SAT SD), PSAT/NMSQT, PSAT 10, and PSAT 8/9. This set of assessments focuses on the durable knowledge and skills that evidence shows matter most for college and career readiness and success. The tests are connected by the same underlying content continuum of knowledge and skills, and when used together, provide multiple opportunities for students to demonstrate their achievement and make improvements. The tests of the SAT Suite share a vertical scale reported in an integrated portal with student and educator access, making the results clear and actionable for families and schools.

Enduring Value of the SAT

When nearly every college and university went test-optional during the pandemic, millions of students still took the SAT. The SAT continues to play a vital role in a holistic admission process and colleges and universities across the country are reviewing their test policies with some moving back to requiring students to submit test scores. When viewed within the context of where a student lives and learns, test scores can confirm a student's grades or demonstrate their strengths beyond what their high school grades may show.

Most students want to take the SAT, find out how they perform, and then decide whether they want to submit their scores to colleges. When surveyed, 83% of students said they want the option to submit test scores to colleges. This finding remains consistent whether students have taken the SAT and across race/ethnicity and parents' level of education.

SAT Validity

College Board has conducted extensive research on the validity of the SAT as a predictor of college readiness and success, including convergent validity, predictive validity, and course performance. Based on hundreds of thousands of students attending 250+ colleges and universities, our research has found that SAT scores are useful predictors of:

- First-semester college course performance in the matching academic domains
- First-year grade-point average (FYGPA)
- Retention through each year of college
- Degree completion

The PSAT Related Assessments

The PSAT Related Assessments include the PSAT/NMSQT, PSAT10 and PSAT 8/9. These assessments are built on the same content framework and scoring scale as the SAT. They contain grade-level appropriate content and provide the same type of accommodations for students with disabilities and support for EL students are provided for PSAT10 and PSAT 8/9. Additionally, the PSAT/NMSQT and PSAT10 offer opportunities in scholarship and recognition programs from the National Merit Scholarship Corporation (PSAT/NMSQT only) and College Board's 23 scholarship partners, including the APIA Scholars, the Hispanic Scholarship Fund, the American Indian Graduate Center, the Jack Kent Cooke Foundation, the Horatio Alger Association, the Jackie Robinson Foundation, and UNCF (the United Negro College Fund). Districts and schools can utilize these assessments, in conjunction with the SAT, to gain insights into college and career readiness as students progress through grades 8-12.

More About the SAT Suite of Assessments

College Board's College and Career Readiness Benchmarks

Students are considered college and career ready when their SAT section scores meet both the Math and the Reading and Writing benchmarks. It's important to note that college readiness is a continuum—students scoring below the SAT benchmarks can still be successful in college, especially with additional preparation and perseverance.

Students with an SAT Math section score that meets or exceeds the benchmark have a 75% chance of earning at least a C in first-semester, credit-bearing college courses in algebra, statistics, precalculus, or calculus.

Students with an SAT Reading and Writing section score that meets or exceeds the benchmark have a 75% chance of earning at least a C in first-semester, credit-bearing college courses in history, literature, social sciences, or writing classes.

Career Readiness

College Board has engaged in significant research that has found that SAT Suite scores are connected to a student's readiness for careers. With an SAT or PSAT score, students can identify jobs that may be a good fit based on how their test performance aligns to the quantitative and literacy specifications of a career. In partnership with researchers at HumRRO, College Board worked to map SAT scores to the occupational descriptors of jobs, using the U.S. Department of Labor's Occupational Information Network (O*NET) database. Covering the entire U.S. economy, O*NET is the nation's primary source of up-to-date occupational information, including each occupation's knowledge, skill, and ability (KSA) descriptor.

SAT Scores and Reports

Scores for the SAT Suite are reported to the state, districts, and schools via College Board's K-12 Reporting portal. There are three years of data in the system, and a user may request historical data. This allows districts/schools to easily compare performance year over year.

The vertically aligned SAT Suite supports the measurement of student growth year to year. Growth reports are available to districts and schools via College Board's K-12 Reporting Portal. College Board will review and revise our growth tables following the first administration of the digital SAT Suite, which will occur during the 2023-2024 school year. New growth reports will become available in the 2025-2026 school year.

One of the benefits of the SAT Suite is AP Potential, which is a research-based way to identify students who are prepared to be successful in Advanced Placement courses. AP Potential can be a powerful tool to help students maximize their course options in 11th and 12th grades based on their post-secondary and career interests/plans.

The Knowledge and Skills Report will provide districts, schools, and students with detailed feedback on academic strengths and areas for improvement. For educators, this report can support curricular and instructional alignment and enhancements. For students, it can be used to highlight the knowledge and skills that they can develop using free resources such as Official Digital SAT Prep via Khan Academy.

Skills Insight

Skills Insight is a score interpretation framework that College Board developed for the digital SAT Suite. Derived from a careful analysis of student performance on hundreds of digital SAT Suite questions, Skills Insight identifies what test takers who score in particular ranges ("performance score bands") on the Reading and Writing and Math sections typically know and can do in these subject areas, as demonstrated by their digital suite assessment performance. Skills Insight is an online tool that provides an easy and intuitive way for teachers, students, and education professionals to better understand and make use of scores from the digital SAT Suite. In addition to the skill statements, exemplar questions solidify those statements by illustrating the kinds and rigor of test questions that students in various performance score bands are typically able to answer correctly.

SAT Suite Question Bank

The SAT Suite Question Banks is a publicly available resource on our website that provides educators and others with access to Reading and Writing and Math items. Question Bank users can sort questions by content domains, score bands, level of difficulty, and skill area. The Question Bank can be used in concert with Skills Insight and performance reports from the K-12 Reporting Portal to help educators understand how knowledge and skills are assessed on the SAT Suite.

Personalized Resources to Support Students

College Board will continue to provide a series of supports and services that ensure students from all backgrounds have access to focused practice and college and career planning resources. Full-length practice tests are available for each assessment in the digital assessment platform to help students become familiar with the test design, test questions, and tools. In addition, students will be able to practice for the digital SAT using the Official Digital SAT Prep Course on Khan Academy.

BigFuture School and Connections™

College Board's SAT Suite includes educational services to help students navigate post-secondary and career pathways and to help K-12 educators and counselors serve their students' needs, including BigFuture School and Connections.

BigFuture School Mobile App

BigFuture School is a free, optional mobile app offering a new way for students to access their scores. Schools may also continue to distribute score reports directly to students. BigFuture School lets students view their score information and get customized career information and guidance about planning and paying for college. During the testing experience, eligible students may choose to provide a mobile number that will only be used by College Board to text them a link to download the app, send a code they will use to log in to the app, and let them know when their scores are ready. The mobile phone number will not be shared or used for any other reason. For students who provide their mobile number, they will have the opportunity to also provide a recovery email, which we recommend providing a second secure option to authenticate access to the mobile app.

Connections

During the testing experience and when students access BigFuture School, they may opt into Connections, a new optional feature exclusively for eligible students that allows them to hear from nonprofit colleges, scholarship programs, and educational organizations that may be a good match. Connections is free to students. No personal information is shared with these organizations as part of Connections. If a student is interested in one of the colleges or programs, the student decides if and when to contact them. Students may control specific communication preferences in Connections and may opt-out of Connections at any time.

Delivery of the Digital SAT Suite of Assessments

The digital SAT Suite of Assessments utilizes a multi-stage adaptive test design. Each assessment is comprised of two sections – Reading and Writing, and Math. Each section is comprised of two modules. The first module in each section is comprised of a mix of easy, medium, and difficult level questions. Based on how a student performs in the first module, they will automatically be provided with a second module which is comprised of items at a lower or higher level of difficulty.

The digital SAT Suite of Assessment is delivered using College Board's propriety test delivery system which is comprised of two components: Bluebook and Test Day Toolkit. Bluebook is College Board's digital testing application which must be installed on the devices that students will use to take the test. Test Day Toolkit is College Board's web-based test administration tool for test coordinators, proctors, and other staff who are responsible for planning the administration and testing students. Additional information about Bluebook can be found at https://bluebook.collegeboard.org. Information about Test Day Toolkit can be found at https://bluebook.collegeboard.org/test-admin.

Most students will be able to take the SAT Suite digitally. However, some students may require paper testing. College Board will provide linear paper testing to any student who has an accommodation in College Board's SSD Online system which requires that the student be assessed using a linear paper format. In addition, College Board will support linear paper testing for students with religious beliefs and tenets that prohibit the use of technology and for students that are located in specialized facilities that have regulations and/or security protocols that prevent the assessments from being administered online.

2025 – 2026 Test Administration Dates

The digital, adaptive design of the SAT Suite has increased test security as each student is administered a unique version of the assessment which allows more flexibility in when and how schools can administer the assessments. Schools can administer the assessments on as many days of the testing window as needed. Standard and accommodated test takers will test during the window.

The test administration dates for the 2025 – 2026 school year are as follows:

PSAT/NMSQT and PSAT 8/9:

Fall 2025 Digital Administration Window: October 1, 2025 – October 31, 2025[1]

PSAT 10 and PSAT 8/9:

Spring 2026 Digital Administration Window – March 2, 2026 – April 30, 2026

SAT School Day:

Fall 2024 Digital Administration Window: October 1, 2025 – October 31, 2025

Spring 2026 Digital Administration Window – March 2, 2026 – April 30, 2026

SAT Weekend:

Digital Administrations

- August 23, 2025
- September 13, 2025 - **NEW**
- October 4, 2025
- November 8, 2025
- December 6, 2025
- March 14, 2026
- May 2, 2026
- June 6, 2026

For complete details, including all administration related timelines and actions, please visit https://support.satsuite.collegeboard.org/spring-2024-testing/educator-experience-home/getting-started

[1] For Fall 2025 only, the PSAT/NMSQT will be offered on two Saturdays (October 11 and October 18).

Attachment 7
College Board Contracts
and
Terms and Conditions

ADVANCED PLACEMENT SCHEDULE FOR DISTRICT CENTRAL BILLING FOR 2026 AP EXAMS

I. SCOPE OF WORK

A. AP Exam Administration.

The Advanced Placement® Exams will be furnished by College Board to students in May of 2026 ("2026 AP® Exam"). In connection with College Board's administration of the 2026 AP Exams: i) College Board and **{District Name}** (hereinafter "District") will implement this district central billing agreement for the District to pay for 2026 AP Exams on behalf of students and if requested by District, any additional fees incurred for students who have registered to take the 2026 AP Exams; ii) College Board will provide an online participation form ("AP Participation Form") for e-signature to each of District's schools, which authorizes each school to order and administer AP Exams; and iii) College Board will make AP participation and performance data ("AP Online Score Reports") available for District's students enrolled in schools participating under this Agreement.

B. District Central Billing for AP Exams.

College Board's standard fee for each 2026 AP Exam is $99.00 (ninety-nine dollars). The exam fee includes a $9.00 (nine dollars) rebate per exam that schools can retain to offset exam administration costs. College Board provides a $37.00 (thirty-seven dollars) fee reduction per exam for eligible students with financial need ("College Board AP Exam fee reduction").

District will pay College Board for AP Exams on behalf of its students as follows:

1) For each 2026 AP Exam taken by students who attend District's schools and do not qualify for the College Board AP Exam fee reduction, the following will occur:

   i. District will pay $90.00 (ninety dollars) per exam to College Board on behalf of its students; and

   ii. The student's $9.00 (nine dollars) fee per exam paid to the school may be retained by the school unless the applicable school will forego its $9.00 (nine dollars) rebate per exam.

2) For each 2026 AP Exam taken by students who attend District's schools, and who qualify for the College Board AP Exam fee reduction, as indicated by the applicable school's AP coordinator, the following will occur:

   i. College Board will provide a $37.00 (thirty-seven dollars) fee reduction per exam; and

   ii. The applicable school will forego collecting its $9.00 (nine dollars) rebate per exam from the student; and

   iii. District will pay $53.00 (fifty-three dollars) per exam to College Board on behalf of its students.

District is required to designate a duly authorized official ("District Official") to request this district funding arrangement in College Board's "AP Registration and Ordering" system. If the District Official sets up the District funding in AP Registration and Ordering, College Board will then bill the District centrally based on the number of AP Exams administered in each category as indicated. If the District Official does not set up the District funding arrangement in College Board's "AP Registration and Ordering" system, each of District's individual schools will be invoiced and required to pay College Board instead.

C. Additional Fees.

If the designated District Official sets up the District funding arrangement in College Board's "AP Registration and Ordering" system to include any of the following additional fees, College Board will bill the District centrally for the additional fees indicated, if incurred:

i. **Late Order Fee:** $40 per exam in addition to the base exam fee for each exam ordered between November 15, 2025, and March 13, 2026, 11:59 pm ET. This fee will not apply to exams for courses that start after the November 14 final ordering deadline nor for exams for students who transfer to the District.
ii. **Unused/canceled exam fee:** $40 per exam for:
    a. Exams canceled in the AP Registration and Ordering system after November 14, 2025, and by March 13, 2026.
    b. Exams that are not taken and are indicated as unused in AP Registration and Ordering before the school's invoice is generated. (Invoices are generated after late testing ends.)
    c. The original exam fee is removed from the invoice.
iii. **Late-testing fee:** $40 per exam in addition to base exam fee as applicable for late-testing exams.
iv. **Late Exam Return:** Twice the exam fee for each exam in shipments received after June 1, 2026.
v. **Free-Response Booklets:**
    a. Schools can order their students' free-response booklets for a fee that is based on the number of booklets provided:
        i. $60: 1-20 booklets
        $120: 21-50 booklets
        $180: 51-100 booklets
        $300: More than 100 booklets

D. Invoicing.

College Board will bill the District on behalf of its students by June 30, 2026 for the 2026 AP Exams and any additional fees requested to be incurred. District shall remit payment to the address on the invoice of the amount indicated within thirty (30) days upon receipt of such invoice.

II. ADVANCED PLACEMENT TERMS AND CONDITIONS

A. Ownership of Intellectual Property. District acknowledges and agrees that the AP Online Score Reports and the AP Exam, and all items (questions) contained therein, including all copies

thereof, all examination materials, and all data included but not limited to all individually identifiable information collected under this Agreement is at all times exclusively owned by College Board, who is the exclusive owner of all rights therein, in and to the AP Exam, including, without limitation, all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights, and all renewals and extensions thereof. Nothing in this Agreement should be interpreted to indicate that College Board is passing its proprietary rights in and to the AP Exam to the District except for the license that has been granted.

B. AP Online Score Reports. When accessing the AP Online Score Reports, District shall comply with the terms of use of the online site. District may provide the AP Online Score Reports to the state or federal agency that has funded any of the exams furnished under this Agreement. District is prohibited from using the AP Online Score Reports and any data within the reports for any other purpose without the express written consent of College Board.

COLLEGE READINESS PROFESSIONAL LEARNING SCHEDULE

I. PROFESSIONAL LEARNING WORKSHOP AND MATERIALS

The College Board shall furnish the below referenced professional learning workshop(s) for a period indicated below, which is mutually selected, agreed upon, and scheduled by the College Board and Client. During each workshop, the College Board will provide Client's officials, teachers and administrators with instructional strategies, technical training, and associated support. At each workshop each participant will have access to instructional materials through the AP Professional Learning platform. The Client's purchase of the workshop is intended for up to but not to exceed 30 participants (officials, teachers, or administrators) per presenter per workshop. Participants may be of the Client's choosing; however, the Client is prohibited from reselling participant seats.

Workshop Name	Duration	Date Range	Workshop Fee

Purchaser shall be responsible for confirming that the duration, scope, and dates of the workshops are in compliance with applicable local, state, and federal statutes and regulations, applicable standards of relevant national professional associations, and applicable collective bargaining agreements. The College Board reserves the right to change the implementation information at any time. In the event the College Board does not receive the information required prior to the Workshop by the date specified by the College Board, the workshop may or may not be furnished. If the College Board furnishes a Workshop, then the quality of the workshop may or may not be affected, and the College Board shall not be responsible for any problems, issues, or effectiveness of the Services based on Purchaser's failure to provide such information on a timely basis.

II. FEES

The total fees for the Professional Learning Workshops shall be **$0.00**.

The workshop fees do not cover the following costs associated with the workshop: meeting room fees, audio-visual fees, food, insurance, fees for applicable substitute teachers and other costs for Client personnel, and other on-site or transportation expenses. Client shall be responsible for and pay directly the costs not covered by the fee.

III. TERMS AND CONDITIONS

Workshop Cancellation and Rescheduling. The College Board shall make the workshops available to Client at the dates and times set forth in the Schedule. In the event that Client wishes to cancel or reschedule a workshop, Client shall notify the College Board in writing no later than thirty (30) days prior to the first day of the workshop. Client shall notify the College Board in writing of their intent to cancel or reschedule a workshop. If the Client notifies the College Board less than thirty (30) days prior to the first day of the workshop, then Client agrees to pay the College Board the following cancellation fees :

Date of Notice	Cancellation	Reschedule
0-14 days prior to event	50% of workshop fee	$1,000
15-30 days prior to event	25% of workshop fee	$500

Client shall pay cancellation or rescheduling fees within thirty (30) days of issuance of invoice from the College Board to Client. Such fee shall not apply to any cancellations or rescheduling caused by a Force Majeure event.

Expedited Workshop Request Planning Fee. If Client does not provide a completed Meeting-Consultant Request Form, as well as a purchase order, check, or credit card payment for processing at least sixty (60) days in advance of the first day of a scheduled Service or places an order for a Service less than sixty (60) days in advance, Client shall be subject to an expedited planning fee up to 40% of the cost of the Service. These fees apply to all Services in the Agreement, regardless if Client has received any discounts. Client must order all Services no less than Twenty-one (21) days prior to the first day of Services.

IV. ACCOMMODATIONS AND INSTRUMENTS

Client shall furnish workshop space, instruments such as a projector, screen, chairs and desks/tables, and whiteboards as necessary for the Services, and any food or refreshments Client wishes to have onsite.

Client shall designate, and shall cause each Services Location to designate an information technology contact. Client information technology contact and the Services Location information technology contacts shall address any technical issues that may arise in the course of the Service.

Client will ensure network access and Internet connectivity during the workshop, and will require Client information technology contact or another appropriate staff person to be available during the Services to assist in the maintenance of such network access and Internet connectivity.

AP Professional Learning Order Terms and Conditions

AP PROFESSIONAL LEARNING POLICIES

Orders. Orders require a signed order form (this "Agreement") and either a purchase order or check made payable to "College Board".

Services. College Board shall furnish the selected professional learning workshop(s) for the period indicated in Section 2, which is mutually selected, agreed upon, and scheduled by College Board and Client. During each workshop, College Board will provide Client's officials, teachers and administrators with instructional strategies, technical training, and associated support. At each workshop College Board will provide each participant with one copy of the instructional materials (hardcopy or electronic as indicated on the Order Form). The Client's purchase of the workshop is intended for up to but not to exceed 30 participants (officials, teachers, or administrators) per presenter per workshop. Participants may be of the Client's choosing; however, the Client is prohibited from reselling participant seats. AP Professional Learning workshops may not be recorded.

Purchaser Obligations. Purchaser shall be responsible for confirming that the duration, scope, and dates of the workshops are in compliance with applicable local, state, and federal statutes and regulations, applicable standards of relevant national professional associations, and applicable collective bargaining agreements. Client shall choose its teachers and educators to participate in any Workshop; provided, however, Client is prohibited from selling seats to teachers and educators who do not work for Client to any Workshop without advance written consent (with email to suffice) of College Board. College Board reserves the right to change the implementation information at any time. In the event College Board does not receive the information required prior to the Workshop by the date specified by College Board, the workshop may or may not be furnished. If College Board furnishes a Workshop, then the quality of the workshop may be affected, and College Board shall not be responsible for any problems, issues or effectiveness of the Services based on Purchaser's failure to provide such information on a timely basis.

Fees and Payment.

Costs Excluded from Fee. The fees do not cover the following costs associated with Workshops: meeting room fees, audio-visual fees, food, insurance, fees for applicable substitute teachers and other costs for Purchaser personnel, and other on-site or off-site transportation expenses and lodging. Purchaser shall be responsible for and pay directly the costs not covered by the fees.

Workshop Cancellation or Rescheduling. College Board shall make the workshops available to Client at the dates and times set forth in the Schedule. In the event that Client wishes to cancel or reschedule a workshop, Client shall notify College Board in writing no later than thirty (30) days prior to the first day of the workshop. Client shall notify College Board in writing of their intent to cancel or reschedule a workshop. If the Client notifies College Board less than thirty (30) days prior to the first day of the workshop, then Client agrees to pay College Board the following cancellation fees:

Date of Notice	Cancellation	Reschedule
0-14 days prior to event	50% of workshop fee	$1,000
15-30 days prior to event	25% of workshop fee	$500

Client shall pay cancellation or rescheduling fees within thirty (30) days of issuance of invoice from College Board to Client. Such fee shall not apply to any cancellations or rescheduling caused by a Force Majeure event.

In the event that Client wisthes to shift an in-person workshop to an online format, Client shall notify College Board in writing no later than seventy-two (72) hours prior to the workshop start time. This will ensure College Board has time to inform the presenter to cancel their travel plans and shift their agenda to an online format. In the event College Board needs to shift an in-person workshop to an online format, College Board shall notify Client in writing no later than seventy-two (72) hours prior to the workshop start time and provide an online platform.

Expedited Workshop Request Planning Fee. If Client does not provide a completed and signed PL Order Form, as well as a purchase order, check, or credit card payment for processing at least sixty (60) days in advance of the first day of a scheduled Service or places an order for a Service less than sixty (60) days in advance, Client shall be subject to an expedited planning fee up to 40% of the cost of the Service. These fees apply to all Services in this Agreement, regardless if Client has received any discounts. Client must order all Services no less than twenty-one (21) days prior to the first day of the Services.

Information Technology Contact. Client shall designate, and shall cause each school to designate an information technology contact. Client information technology contact and the School information technology contacts shall address any technical issues that may arise in the course of the Service.

Network Access and Internet Connectivity. Client will ensure network access and Internet connectivity during the workshop and, will require Client information technology contact or another appropriate staff person to be available during the Services to assist in the maintenance of such network access and Internet connectivity.

Accommodations and Instruments. (For in-person workshops only) Client shall furnish workshop space, instruments such as a projector, screen, chairs and desks/tables, and whiteboards as necessary for the Services, and any food or refreshments Client wishes to have onsite. All participants will need to bring, or have access to, a device that can connect to the internet. **(For online workshops only)** College Board shall provide a Learning Management System (LMS) that allows attendees to participate and interact in online learning environments.

General Disclaimer. College Board hereby disclaims all warranties, whether express or implied, including, without limitation, any implied warranties of merchantability, or fitness for a particular purpose.

Limitation of Liability. To the extent permitted by law, in no event will the total liability, in the aggregate, of College Board and its affiliates for any and all claims, losses, costs or damages whatsoever arising out of, resulting from or in any way related to this agreement or the work performed by College Board pursuant to this agreement from any cause or causes, included but not limited to the negligence, professional errors or omissions, strict liability or breach of contract or warranty express or implied of College Board or its affiliates, exceed the actual amount paid to College Board under this agreement for the specific deliverable subject to the damages claim.

In no event will College Board and its affiliates have any liability to purchaser in connection with this agreement for any direct, indirect, consequential, incidental, special or punitive damages, regardless of the nature of the claim or theory of liability. To the extent allowed by law, purchaser will indemnify, defend and hold harmless, College Board against third party claims that arise as a result of the breach of this agreement by purchaser.

Ownership of Intellectual Property. Purchaser agrees and acknowledges that all intellectual property provided under or pertaining to this Agreement, including, but not limited to, any College Board publications, College Board website(s), videos, examinations and all items contained therein, including all copies thereof, all data and any parts thereof, all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights are the sole and exclusive property of College Board. Nothing in this Agreement should be interpreted to indicate that College Board is passing its proprietary rights in and to College Board Intellectual Property to the Client. Copying, disseminating, or posting any AP material on an internal or external website, including social media sites, is a breach of your agreement with College Board, unless expressly permitted by College Board.

Force Majeure. Either party may be excused from performance of an obligation under this Agreement in the event that performance of that obligation by such party is prevented by an act of God, act of war, terrorism, riot, fire, explosion, flood or other circumstance that is beyond the control of, and could not reasonably be avoided by, such party.

Payment. This Agreement supersedes any conflicting terms and conditions contained in Purchaser's purchase order.

I verify that the information and quantities on this form are accurate and that I am authorized to approve this order on behalf of the district/school indicated. I understand and accept the terms and conditions outlined in the "AP Professional Learning Policies" section of this form.

Authorized Signature	**Date**
Print Name	**Title**

Pre-AP Ordering Terms & Conditions

By ordering College Board's Pre-AP® program, you ("You") accept the terms of this agreement (this "Agreement"). If You subscribe to Pre-AP pursuant to a separate written contract with College Board ("CRS Agreement"), theterms of the separate written CRS Agreement between College Board and You for Pre-AP supersede the terms contained herein to the extent they conflict with any terms in this Agreement.

License Grant. The following licenses are referred to herein collectively as the "Licenses".

Site License. College Board hereby grants to You and, if applicable, to allow each of your participating schools, a limited, non-exclusive, non-transferable, non- assignable, revocable license during the Term of this Agreement to access and use the Pre-AP website ("Pre-AP Website") and to use all content available on the Pre-AP Website in print or otherwise provided to Client via myap.collegeboard.org (the 'Pre-AP URL'). Access to the Pre-AP Website is for the sole purpose of improving teaching and learning of students in the grades designated by You.

Schools' Compliance with License Terms. You shall be responsible for the school's compliance withthe terms of all Licenses.

Access to Pre-AP Website. If You and you students choose to access the College Board platform available toPre-AP program users, You and your students will receive access to the platform upon acceptance of the Terms and Conditions related to the platform. You understand and agree that there is a risk of interruption to websites. Additionally, the website may be suspended from time to time for administrative purposes, as necessary, including but not limited to, system maintenance. College Board may change the technical functionality of the website at any time upon notice (where reasonable) to You to the extent necessary to address technical and other business needs of College Board.

Restrictions on Use. You shall not: (a) sell, rent, lease, loan, sublicense, disseminate, assign, reverse engineer, attempt to derive the source code of, transfer or otherwise provide access to third parties, make the website available for use by third parties or use the website for the benefit of any third party; (b) copy, reproduce, modify, adapt, translate or create any derivative works from the website; (c) remove, alter, obscure or tamper with any trademark, copyright or other proprietary markings or notices affixed to or contained within the website; or (d) encourage or permit any user or other third party to engage in any of the foregoing. You shall be responsible for ensuring that all students and teachers comply with the terms of this Agreement. If You violate any of the provisions hereof, College Board shall have the right to terminate your right to use Pre-AP, without waiver of any other remedy, whether legal or equitable.

4. Products.
During the Term, College Board shall furnish material for certain courses (collectively, the 'Products'). Products shall include printed student resources and printed teacher resources. For each course, College Board shall deliver one (1) teacher resource per one hundred and twenty (120) students. You acknowledge and agree that College Board shall be responsible for coordinating shipping and handling of the Products, as long as You provide shipping information, contact name and phone number.

Client Obligations. You shall facilitate student's creation of a Pre-AP account. Information that students may provide (or that may be provided by You) includes school code, name, gender, birth date, grade level, race/ethnicity, mailing address, phone number, email address, student ID, the language the student knows best,

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parent/guardian education levels, Services for Students with Disabilities ID and information, and Pre- AP course enrollment and teacher information ("Registration Information").

You shall comply with the Family Educational Rights and Privacy Act, 20 U.S.C. s. 1232g, and its implementing regulations, 34 C.F.R. pt. 99 ("FERPA") in connection with Pre-AP. Client shall obtain any and all consents necessary for students to participate in Pre-AP, and You shall include in its annual notification of rights under FERPA criteria that support the designation of College Board and its employees as school officials with legitimate educational interests. You authorize College Board to use personally identifiable, non-directory information to conduct studies with the purpose of improving instruction for Pre-AP in accordance with 34 C.F.R. 99.31(a)(6)(i).

You shall be responsible for removing access to the Pre-AP website for any personnel who no longer should have access to the Pre-AP website, or promptly notifying College Board to request removal of any such access.

Client Representations. You have designated as "directory information" for purposes of FERPA, a student's name, the most recent educational agency or institution attended, and the other items specifically identified as directory information in 34 C.F.R. 99.3. To the extent the Registration Information includes only such directory information, College Board may redisclose the Registration Information in accordance with its Privacy Policy without the consent of the parent or student eighteen (18) years of age or older. To the extent that the Registration Information or other personally identifiable information from education records of students disclosed by You to College Board includes information other than directory information, for purposes of FERPA, College Board and its employees and independent contractors are "school officials" whom You has determined to have "legitimate educational interests", and You may disclose such non-directory information to College Board consistent with FERPA and other applicable law and policy.

General Disclaimer. COLLEGE BOARD HEREBY DISCLAIMS ALL WARRANTIES, WHETHER EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE.

Limitation of Liability. TO THE EXTENT PERMITTED BY LAW, IN NO EVENT WILL THE TOTAL LIABILITY, IN THE AGGREGATE, OF COLLEGE BOARD AND ITS' AFFILIATES FOR ANY AND ALL CLAIMS, LOSSES, COSTS OR DAMAGES WHATSOEVER ARISING OUT OF, RESULTING FROM OR IN ANY WAY RELATED TO THIS AGREEMENT OR THE WORK PERFORMED BY COLLEGE BOARD PURSUANT TO THIS AGREEMENT FROM ANY CAUSE OR CAUSES, INCLUDED BUT NOT LIMITED TO THE NEGLIGENCE, PROFESSIONAL ERRORS OR OMISSIONS, STRICT LIABILITY OR BREACH OF CONTRACT OR WARRANTY EXPRESS OR IMPLIED OF COLLEGE BOARD OR ITS' AFFILIATES, SHALL NOT EXCEED THE ACTUAL AMOUNT PAID TO COLLEGE BOARD UNDER THIS AGREEMENT FOR THE SPECIFIC DELIVERABLE SUBJECT TO THE DAMAGES CLAIM.

IN NO EVENT WILL COLLEGE BOARD AND ITS AFFILIATES HAVE ANY LIABILITY TO YOU IN CONNECTION WITH THIS AGREEMENT FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, INCIDENTIAL, SPECIAL OR PUNITIVE DAMAGES, REGARDLESS OF THE NATURE OF THE CLAIM OR THEORY OF LIABILITY. TO THE EXTENT ALLOWED BY LAW, YOU WILL INDEMNIFY, DEFEND AND HOLD HARMLESS, COLLEGE BOARD AGAINST THIRD PARTY CLAIMS THAT ARISE ASA RESULT OF THE BREACH OF THIS AGREEMENT BY YOU.

Ownership of Intellectual Property. You agree and acknowledge that all intellectual property provided under or pertaining to this Agreement, including, but not limited to, any College Board publications, College Board website(s), CD-ROMS, videos, consumable workbooks, examinations and all items contained therein, including all copies thereof, all data and any parts thereof, all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights are the sole and exclusive property of College Board.

You acknowledge that College Board: (a) obtains permission, when necessary, to use certain content from persons, other than you, whose text, information, data, images (still and moving), sound recordings, and/or software ("Third-Party Content") is included in the content; and (b) may, at the sole discretion of College Board, eliminate such content from the content at any time. Third Party Content is owned by the respective authors of such content, and you shall not obtain any rights in or use such content except as provided in these services.

College Board retains all rights not expressly granted under these terms. In no way shall these services be construed to grant Client any rights other than those expressly granted herein. You further acknowledge and

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agree that, with the exception of the Third-Party Content, College Board owns all right, title and interest in and to the content, including without limitation all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights, and all renewals and extensions thereof. AS SUCH, YOU ARE STRICTLY PROHIBITED FROM POSTING THE MATERIALS AND/OR THIRD-PARTY CONTENT ON ANY PUBLIC INTERNET SITE OR SITE THAT THE GENERAL PUBLIC MAY ACCESS. USE OF THE MATERIALS AND THIRD-PARTY CONTENT MAY BE GROUNDS FOR IMMEDIATE SUSPENSION OR TERMINATION OF THESE SERVICES AT COLLEGE BOARD'S DISCRETION.

You shall not upload any Third-Party Content to avoid any possible infringement claim. If College Board receives a notice of infringement from a third party rightsholder for content that was uploaded by You, College Board will promptly notify You of the claim and cooperate with College Board in defending the claim. College Board will have full control and authority over the defense, except that: (a) any settlement requiring You to admit liability or to pay any money will require your prior written consent, such consent not to be unreasonably withheld or delayed; and (b) You may join in the defense with its own counsel at its own expense.

Confidentiality. All information exchanged hereunder to which either party shall have access in connection with this Agreement, including the terms of this Agreement, is confidential ("Confidential Information"), and except as otherwise expressly provided in this Agreement, neither party will authorize or permit the other party's Confidential Information to be conveyed or in any manner communicated to or made available to any third party or to be physically duplicated or reproduced or used by or for the benefit of any third party, in whole or in part; provided, however, that Confidential Information shall exclude any data or information that: (a) is publicly disclosed or expressly approved for public disclosure by the act of an authorized agent of either party; (b) becomes publicly known without breach of any confidentiality obligation; or (c) is required to be disclosed pursuant to any applicable law or regulation, government authority or duly authorized subpoena or court order, provided that the disclosing party in such event shall provide the other party with notice of such requirement as soon as practicable.

Data Protection. College Board shall take actions to ensure the security and confidentiality of Confidential Information. College Board assures Client that College Board employs security controls designed to secure and protect personally identifiable information in a manner consistent with industry standards. College Board shall maintain the Registration Information (defined above) that may be obtained pursuant to this Agreement in a secure computer environment and not copy, reproduce or transmit such data except as necessary to fulfill the purpose of the original request.

College Board has security measures in place designed to help protect against loss, misuse and alteration of the data under College Board's control. College Board shall develop, implement, maintain and use reasonably appropriate administrative, technical and physical security measures to preserve the confidentiality, integrity and availability of all stored, managed, retained, accessed or used student records received from or on behalf of You, Parents or Adult Students as determined by College Board. College Board shall host content on the Pre-AP Website in a secure server environment that uses a firewall and other advanced technology designed to prevent interference or access from outside intruders. Where applicable, the Pre-AP Website will require unique account identifiers, usernames and passwords that must be entered each time a Client or user signs on.

College Board warrants that all student records will be encrypted in transmission and storage where technically feasible and when designed as being appropriate by College Board. If not, other security controls may be implemented to reduce risk, mitigate risk, or otherwise protect the data as determined solely by College Board. When the Pre-AP Website is accessed using a supported web browser, Secure Socket Layer ("SSL") or equivalent technology protects information while in transit, using both server authentication and data encryption to help ensure that data are safe, secure and available to only authorized users.

College Board may use de-identified data: to improve Pre-AP, to demonstrate the effectiveness of Pre-AP, and for research or other purposes related to developing and improving Pre-AP. College Board will share de-identified data with a third-party organization Adobe for the purpose of site analytics data. College Board's use of such de-identified data will survive termination of this Agreement.

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Security Measures. To ensure the security and confidentiality of confidential records College Board shall designate an employee responsible for the training and compliance of all College Board employees, agents, and assigns on compliance with security and confidentiality provisions detailed in this Agreement. College Board warrants that the confidentiality requirements and security measures identified in this Agreement will be extended by contract to any and all subcontractors used by College Board, if any, to execute the terms of this Agreement. College Board will use appropriate and reliable storage media, regularly backup student records and retain such backup copies for the duration of this Agreement and as defined by College Board. You acknowledge that College Board utilizes cloud hosting service providers throughout its infrastructure. College Board warrants that all student records will be stored in the United States where technically feasible and reasonable as determined solely by College Board. You acknowledge that in some cases College Board may not be able to restrict the location of data due to limitations within the cloud hosting service provider capabilities. Notice. In the event of an unauthorized disclosure of student records which have been distributed or received in connection with this Agreement, You and College Board agree to notify the other party, fully investigate the incident and fully cooperate with any investigation of the incident, implement remedial measures and respond in a timely manner. Such notification shall be promptly performed as information becomes available but not greater than ten (10) calendar days immediately upon becoming aware of: (1) a confirmed compromise of student records, or of (2) circumstances that could have reasonably resulted in an unauthorized access to or disclosure of these student records. Both You and College Board acknowledge that in the event of an unauthorized disclosure computer forensics teams may require many days, weeks or even months to fully ascertain the details surrounding the disclosure which may delay prompt notification within the 10 calendar day requirement.

Where information is available, You shall notify the parent or adult student of: (1) the nature of the unauthorized use or disclosure (e.g., security breach, nonconsensual re-disclosure, etc.); (2) the specific student records that were used or disclosed without authorization where possible; (3) what College Board and You have done or will do to mitigate any effects of the unauthorized use or disclosure; and (4) what corrective action College Board and You have taken or will take to prevent future occurrences. Except as otherwise required by law, College Board will not provide notice of the incident directly to the parent or adult student whose student records were involved, regulatory agencies, or other entities, without prior written permission from You.

Use of Cookies.A cookie is a small text file placed on your computer's hard drive when you visit a website. The cookie gives you a unique, random ID, and this ID enables our website(s) to readily recognize each user on a subsequent visit to the site(s). For example, a cookie may indicate the preferences you selected on a prior visit. This facilitates more efficient browsing on subsequent visits, by using your preferences to customize the content and/or layout of our site(s). College Board may use cookies in this fashion. Visitors are free to set their Web browsers to prevent the acceptance of cookies. However, subscribers of the Pre-AP Website must enable cookies to access certain areas. Be aware that College Board website cookies do not contain personally identifiable information. Some Service Providers use cookies on College Board site(s). College Board has no access to or control over these cookies. This privacy statement covers the use of cookies by College Board website(s) only and does not cover the use of cookies by any third-party providers.

Content Revision. College Board reserves the right to update the content of Pre-AP Platform, Products and deliverables. If significant revisions are made to any Product, furnished under this Agreement then Client shall receive the most recent version of the Product. This shall only apply to future years from the revision date of the Product's furnished under this Agreement.

Proprietary Rights and Intellectual Property. College Board and its Service Providers have expended substantial time, effort, and funds to create the website(s) and Pre-AP Platform. You acknowledge and agree that College Board or College Board affiliates exclusively own the copyright to (or have been granted licenses by third parties to use) all rights, title, and interest in Pre-AP Platform and the information, data, databases, images, sound recordings, audio and visual clips, and other content (collectively, 'Content') provided by the website(s). Certain materials specifically designated as belonging to another party are not owned by College Board. No copyrighted material or other Content may be performed, distributed, downloaded, uploaded, modified, reused, reproduced, reposted, retransmitted, disseminated, sold, published, broadcast or circulated or otherwise used in any way whatsoever except as expressly stated either in such materials or in this Schedule without express written permission of College Board or permission of the copyright owner. Any modification of the Content, or any portion thereof, or use of the Content for any other purpose constitutes an infringement of College Board's copyrights and other proprietary rights. Use of the Content on any other website (including, without limitation, internal websites and social media sites) or other networked computer environment is prohibited without prior written permission from College Board. **You agree not to reproduce, duplicate, copy, sell, resell, or exploit for any commercial purposes any portion of the Pre-AP Program, use of the Pre-AP Program, or access to the Pre-AP Program.**

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You agree and acknowledge that Workshops and Products, including, but not limited to, training notes, and materials and booklets provided to participants, including all copies thereof, are the sole and exclusive property of College Board. Copying, disseminating, recording or streaming, or posting any Pre-AP Program material on your internal or any external website, including social media sites, or creating and sharing derivative works of the materials is a breach of your agreement with College Board and College Board's intellectual property rights. You may solely use the Products described herein for the professional development and coaching services provided by College Board in connection with Workshop participants' knowledge and use of the Pre-AP Program.

Except for the license expressly granted herein, You have no rights to or other interests in Pre-AP Platform, materials, Products or Content. College Board reserves all rights not explicitly granted to Client under this Schedule.

You agree that You shall not post any Pre-AP Program material on your internal or any external website and shall advise all Pre-AP Program teachers and students that posting any such material, including answers to any questions on Pre-AP Platform or in Pre-AP student or teacher editions is a violation of College Board's copyright. You agree that You shall not offer for resale and shall advise its teachers and administers not to offer for resale, any used or unused Pre-AP Program material, including student or teacher editions.

Force Majeure. Either party may be excused from performance of an obligation under this Agreement in the event that performance of that obligation by such party is prevented by an act of God, act of war, terrorism, riot, disease-related epidemic/pandemic, fire, explosion, flood or other circumstance that is beyond the control of, and could not reasonably be avoided by, such party.

Payment. This Agreement supersedes any conflicting terms and conditions contained in your purchase order, which College Board accepts to facilitate your billing. You agree to pay any applicable sales, use, value added or other taxes or import duties (other than College Board's corporate income taxes) based on, or due as a result of, any fees paid to College Board under this Schedule, unless Client is exempt from such taxes as the result of Client's corporate or government status. You shall furnish College Board with a valid tax exemption certificate.

Return Policy.

Products. Within thirty (30) days of receipt, You may return at your sole expense, unused Products in new condition. College Board will issue a refund within thirty (30) days upon receipt of the Products.

Pre-AP Website. You may receive a refund of fees paid for the Pre-AP Website license only if You terminate this Agreement prior to receiving access to the Pre-AP Website. College Board will issue a refund within thirty (30) days upon receipt of termination notice, so long as You have no outstanding payments due to College Board.

Signature (must be hand-signed):_____

Date:_____

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Terms & Conditions – 2024-25 Pre-AP Professional Learning Order Form

By acquiring College Board's Pre-AP Professional Learning, you ("Client" or "You") accept the terms of this order form (this "Agreement"). If Client subscribes to Pre-AP Professional Learning pursuant to a separate written contract with the College Board ("CRS Agreement"), the terms of the separate written CRS Agreement between the College Board and Client for Pre-AP Professional Learning supersede the terms contained herein to the extent they conflict with any terms in this Agreement.

Pre-AP Professional Learning Orders. To request Pre-AP Professional Learning ("Services"), Client must submit via email this signed Agreement to College Board at least sixty (60) days prior to the start date of in-person Service, or forty-five (45) days prior to the start date of virtual Service. College Board must receive Client's payment via purchase order, check, or credit card at least thirty (30) days prior to the start date of the Service. If Client does not timely provide each of the foregoing, College Board has no obligation to provide the Service.

Products. For certain Services, College Board shall furnish professional learning materials ("Products"). Client acknowledges and agrees that College Board shall be responsible for coordinating, shipping, and handling of the Products, as long as Client provides shipping information, contact name and phone number when submitting this Agreement.

Client Obligations. Client is responsible for confirming that the duration, scope, and dates of the Services are in compliance with applicable local, state, and federal statutes and regulations, applicable standards of relevant national professional associations, and applicable collective bargaining agreements. Client shall choose its teachers and educators to participate in each Service; provided, however, Client is prohibited from selling seats to teachers and educators who do not work for Client to any Service.

Pre-AP Course Enrollment. Client is responsible for enrolling all schools represented in the related Pre-AP course prior to the first day of the Workshop. The College Board shall not be responsible for any problems, issues, or effectiveness of the Services based on Client's failure to complete enrollment on a timely basis.

Fees and Payment. Client agrees to pay any applicable sales, use, value added or other taxes or import duties (other than College Board's corporate income taxes) based on, or due as a result of, any fees paid to College Board under this Agreement, unless Client is exempt from such taxes as the result of Client's corporate or government status. Client shall furnish College Board with a valid tax exemption certificate.

Costs Excluded from Fees. The fees do not cover the following costs associated with Services: meeting room fees, audio-visual fees, food, insurance, fees for applicable substitute teachers and

other costs for Client personnel, and other on-site or off-site transportation expenses and lodging for participants. Client shall be responsible for and pay directly the costs not covered by the fees.

Rescheduling and Cancellation Costs. In addition to the full cost of the Service, for Services cancelled or rescheduled less than thirty (30) days prior to the first day of in-person Services, or seven (7) days prior to the first day of virtual Services, Client shall pay College Board a fee equal to 50% of the full cost of the Service. These fees apply to all Services in this Agreement, regardless of whether Client has received any discounts. College Board retains the right, in its sole discretion, to apply these fees for rescheduling requests.

Late Fee. If Client does not provide a purchase order, check, or credit card payment for processing in addition to all of the required information outlined in the Service Checklist below at least thirty (30) days in advance of the first day of a scheduled Service, Client shall be subject to a late fee of 40% of the cost of Service.

Expedited Service Request Planning Fee. If Client places an order for an in-person Service less than sixty (60) in advance, or a virtual Service less than thirty (30) days in advance, Client shall be subject to an expedited planning fee of 40% of the cost of the Service. For expedited requests, Client must provide a purchase order, check, or credit card payment for processing in addition to all of the required information outlined in the Service Checklist by the applicable due dates. These fees apply to all Services in this Agreement, regardless of whether Client has received any discounts. If Client requests an expedited Service, Client will only be charged the 40% expedited planning fee and will not be charged an additional fee for a late payment if Client submits the payment (i) by the payment deadline, or (ii) if less than thirty (30) days prior to the first day of Service, with a signed copy of this Agreement.

College Board will not approve in-person Services requested less than twenty-one (21) days prior to the first day of the Service or virtual Service requested less than fourteen (14) days prior to the first day of the Service.

Participant Fee. If the number of participants present at the Service exceeds the maximum 28 participants, Client is subject to a fee of up to 20% of the total cost of the Services, and College Board reserves the right to decline furnishing the Services. This fee applies to all Services in this Agreement, regardless of whether Client has received any discounts.

Force Majeure. Either party may be excused from performance of an obligation under this Agreement in the event that performance of that obligation by such party is prevented by an act of God, act of war, epidemic, terrorism, riot, fire, explosion, flood or other circumstance that is beyond the control of, and could not reasonably be avoided by, such party.

Entire Agreement. This Agreement, including the associated purchase order and any counterparts, is the full and entire agreement and supersedes any prior agreements between the parties relating to the subject matter hereof.

Service Checklist. Client will collect and provide College Board with the implementation information ("Implementation Information") below via this Agreement at least thirty (30) days prior to the first day of the Service, or upon execution of this Agreement if College Board is offering an expedited Service:

- District Information. District contact information, District Service Coordinator, District contract signatory, number of participating middle schools, and/or number of participating high schools.
- School Information. School contact information, principal contact information, School Service coordinator, and where applicable, information technology contact information.
- Service Site. Venue address to host the Services, which includes a meeting room and where applicable, audio-visual equipment.
- Pre-AP Course Audit Approval. Client is responsible for ensuring all participants have enrolled in Pre-AP Course Audit and been approved by their school's designated Pre-AP Course Audit Administrator prior to the first day of the Service. College Board shall not be responsible for any problems, issues, or effectiveness of the Services based on Client's failure to complete Course Audit Approvals on a timely basis.
- Virtual Participant Information. Client shall provide participants with registration information provided by College Board, so that participants are able to register and access College Board's virtual meeting platform for the Service. The number of participants may not exceed the maximum outlined in this Agreement, or Client will be subject to the Participant Fee outlined above. Virtual Services are not recorded for use by Client or College Board after the Service.
- In-Person Participant Information. The number of participants, and their subject and grade levels. Client agrees that College Board may rely on such list in determining the number of materials and consultants provided by College Board to Client at such Service. The number of participants may not exceed the maximum outlined in this Agreement, or Client will be subject to the Participant Fee outlined above.
- Designation of Service Coordinator. Client shall designate a Service coordinator who shall be College Board's principal contact and shall assist in the organization and training.
- Information Technology Contact. Client shall designate and shall cause each School to designate an information technology contact. Client information technology contact and the School Information Technology Contact shall address any technical issues that may arise in the course of the Service.
- Network Access and Internet Connectivity. Client will ensure network access and Internet connectivity during the Service for the facilitator and participants and will require Client Information Technology Contact or another appropriate staff person to be available during the Services to assist in the maintenance of such network access and Internet connectivity.
- Accommodations and Instruments. Client shall furnish service space, instruments such as projectors, chairs and desks, and whiteboards as necessary for in-person Services, and any food or refreshments Client wishes to have onsite. All virtual participants will need to have access to an individual device that can connect to the internet.

College Board reserves the right to change the Implementation Information at any time. In the event College Board does not timely receive the Implementation Information required, College Board reserves the right to decline furnishing the Services. If College Board agrees to furnish Services without complete Implementation Information, then College Board shall not be responsible if Client believes it has received incomplete or ineffective Services.

If this Agreement includes any complimentary Services, Client may not make any substitutions.

General Disclaimer. College Board HEREBY DISCLAIMS ALL WARRANTIES, WHETHER EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE.

Limitation of Liability. TO THE EXTENT PERMITTED BY LAW, IN NO EVENT WILL THE TOTAL LIABILITY, IN THE AGGREGATE, OF COLLEGE BOARD AND ITS AFFILIATES FOR ANY AND ALL CLAIMS, LOSSES, COSTS OR DAMAGES WHATSOEVER ARISING OUT OF, RESULTING FROM OR IN ANY WAY RELATED TO THIS AGREEMENT OR THE WORK PERFORMED BY COLLEGE BOARD PURSUANT TO THIS AGREEMENT FROM ANY CAUSE OR CAUSES, INCLUDED BUT NOT LIMITED TO THE NEGLIGENCE, PROFESSIONAL ERRORS OR OMISSIONS, STRICT LIABILITY OR BREACH OF CONTRACT OR WARRANTY EXPRESS OR IMPLIED OF COLLEGE BOARD OR ITS' AFFILIATES, SHALL NOT EXCEED THE ACTUAL AMOUNT PAID TO COLLEGE BOARD UNDER THIS AGREEMENT FOR THE SPECIFIC DELIVERABLE SUBJECT TO THE DAMAGES CLAIM. IN NO EVENT WILL COLLEGE BOARD AND ITS AFFILIATES HAVE ANY LIABILITY TO CLIENT IN CONNECTION WITH THIS AGREEMENT FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, INCIDENTIAL, SPECIAL OR PUNITIVE DAMAGES, REGARDLESS OF THE NATURE OF THE CLAIM OR THEORY OF LIABILITY. TO THE EXTENT ALLOWED BY LAW, CLIENT WILL INDEMNIFY, DEFEND AND HOLD HARMLESS, COLLEGE BOARD AGAINST THIRD PARTY CLAIMS THAT ARISE AS A RESULT OF THE BREACH OF THIS AGREEMENT BY CLIENT.

Ownership of Intellectual Property. Client agrees and acknowledges that all intellectual property provided under or pertaining to this Agreement, including, but not limited to, any College Board publications, College Board website(s), service materials, Products, CD-ROMS, videos, examinations and all items contained therein, including all copies thereof, all data and any parts thereof, all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights ("College Board Intellectual Property") are the sole and exclusive property of College Board. Nothing in this Agreement should be interpreted to indicate that College Board is passing its proprietary rights in and to College Board Intellectual Property to Client. Copying, disseminating, or posting any College Board Intellectual Property on an internal or external website, including social media sites, is a breach of this Agreement.

Annex 1

College Board's College and Career Readiness Educational Services

With the Covered Assessments, College Board shall provide the following educational services to help students navigate post-secondary and career pathways and to help K-12 educators and counselors serve their students' needs (collectively, "Educational Services").

"App" refers to a College Board mobile application, BigFuture® School, that students age 13 and older can download from the App Store to access Educational Services. The App is only available for students taking the SAT School Day, PSAT/NMSQT, PSAT 10 and PSAT 8/9. "BigFuture School" as used herein refers to the Educational Services provided on the App (including in-App notifications if the student elects to turn on those notifications) and potential other channels such as through a website portal exclusively for the Educational Services.

SCORE INFORMATION: In BigFuture School, students may access their scores and other score information (collectively, "Score Information") for College Board assessments including scores received by students on Covered Assessments. For SAT School Day, Score Information will include career readiness indicator(s) derived from the student's scores and the U.S. Department of Labor/Employment and Training Administration Occupational Informtion Network (O*NET), mapping the math, reading, and writing skills measured by the SAT to the qualitative and literacy skills for occupations in O*NET.

RECOMMENDATIONS: In BigFuture School, College Board may provide students with educational information and recommendations about college and career options including, for example, AP Potential, postsecondary options and opportunities, career pathways, scholarships, National Recognition Program potential eligibility, financial aid and paying for college information, and opportunities to participate in College Board research studies (collectively, "Recommendations"). In providing and customizing Recommendations, College Board may use score ranges, career readiness indicators as provided in their Score Information for SAT School Day, and student information collected in connection with Covered Assessments and through students' use of Educational Services. In the Recommendations, College Board may include third-party links to other sites that are not operated by us, including colleges, universities, scholarship organizations, and career information sites. College Board is not responsible for the content or operation of other websites, and links to other websites are not intended to imply endorsement of them by College Board.

CONNECTIONS*: Connections is available to students taking the SAT School Day, PSAT/NMSQT, and PSAT 10. Connections is a College Board program through which students are provided information about non-profit colleges, universities, nonprofit scholarship providers, and other government agencies administering educational programs ("Eligible Institutions") and may receive preliminary offers of admission from nonprofit colleges and universities ("Participating Colleges"). Information provided to students is based on criteria provided by those Eligible Institutions and Participating Colleges and student information and interests. This may include:

- student interests, demographics, students' use of Educational Services, and other information collected by College Board during Covered Assessment(s) for which the student opts-in to Connections; (
- students' interests and preferences (such as through user controls within the App, through engagement in BigFuture School, and any updates students make to their information in their use of Educational Services) ;
- assessment score ranges the student received on past and future SAT, AP, PSAT/NMSQT and PSAT10 assessments; and.
- for preliminary offers of admission from Participating Colleges, assessment score ranges the student received on past and future SAT assessments may be used, and race and ethnicity will not be used.

College Board never shares students' personally identifiable information with Eligible Institutions or Participating

Colleges as part of Connections.

Connections is entirely optional, and students must affirmatively opt-in and agree to College Board's use of their information as described above for Connections if they wish to participate. Unless an LEA or a school directs College Board to exclude its students from Connections (as further described below), students can opt-in during Covered Assessment(s) or in the App and may be able to do so through other channels. If a student opted-in to Connections during a prior SAT School Day, PSAT/NMSQT, or PSAT 10 assessment pursuant to an agreement with their school, district, or state, Client acknowledges and agrees to use of the student's information from Covered Assessment(s) under this Agreement in Connections, with notice of the same and opportunity to opt-out presented to any such students during the Covered Assessment(s).

Students can opt-out of Connections at any time, using any of the multiple ways provided, including, an opt-out feature within the App, an unsubscribe option from Connections emails, opt-out instructions included in each mailing, and by contacting College Board's customer service. Students can also choose to remain in Connections but opt-out of individual communications channels (emails, hardcopy mailings, and in-App).

Opted-in students may receive information from and about from Eligible Institutions and Participating Colleges in the App (including in-App notifications if the student elects to turn on those notifications), by hard copy mail, and by email, subject to the student providing their home address, email, and/or downloads the mobile application, all of which data elements are optional. Eligible Institutions and Participating Colleges do not know the identity of a student to whom information is delivered unless and until the student chooses to provide their personal information directly to the Eligible Institution or Participating College, which the student can only do outside of the App and outside of the Educational Services. A student may be able to link from the App, email, or QR code in a mailing to further content within BigFuture School or to an external webpage or webform hosted by that Eligible Institution or Participating College. Any preliminary offer of admission will include a school-specific website link through which the student may share their information directly with the Participating College, after which the Participating College may inform the student about any next steps to enroll as well as to be considered for any financial aid. College Board may track students' access to such links/webpages for purposes of reporting and analytics, but College Board will not disclose such information to Eligible Institutions or Participating Colleges other than in de-identified and aggregated form.

Content provided to students through Connections are created by Eligible Institutions and Participating Colleges and may include text, images, videos, and interactive elements. While Connections may be personalized by College Board (e.g., student name at the top of an email) through automated means, College Board is not responsible for and does not create, edit, or approve of the content. Notwithstanding the foregoing, College Board may send a communication to the student alerting them that information through Connections is forthcoming and/or available in BigFuture School for them to access.

For students who receive a preliminary offer of admission, there is no guarantee of admission, scholarships, or financial aid and it may require them to complete additional steps to accept the offer as defined by the Participating College(s). The Participating College(s) may also require confirmation of information it relied upon in making a preliminary offer of admission, such as requiring the student to submit their final transcript to complete the admissions process. Each Participating College makes the decision on preliminary offers of admission. College Board is not involved in any of the selection or decision making by the Participating College(s).

*Not offered in New York at this time. There may be other exclusions.

ADDITIONAL DETAILS REGARDING EDUCATIONAL SERVICES:

There is no incremental cost for Educational Services.

College Board shall provide Client with reporting on its students' use of Educational Services, with the content and cadence within College Board's sole discretion.

College Board collects certain information from students during Covered Assessments to ensure test validity and fairness, for identity matching and the purposes described above under the "College Board Collection, Use, and Disclosure of Data" section. College Board also uses that information in Educational Services, as described above, and to communicate with students about their Covered Assessment(s) and the Educational Services. For students who use the Educational Services, they may be able to update this information within the Educational Services, if they so choose. **All questions are optional.**

Questions include the following:
- Home/Mailing Address
- Email Address
- Race
- Ethnicity
- First Language
- Best Language
- GPA
- Intended College Major
- Level of Education Aspirations
- Parents' Level of Education

The following are only asked for the PSAT/NMSQT:
- Whether the student is enrolled in high school traditional or homeschooled
- Whether the student will complete or leave high school and enroll full-time in college
- How many total years the student will spend in grades 9-12
- Whether the student is a U.S. citizen (for students testing outside the United States)

To use the App, College Board will provide a secure method for the student to access and authenticate their identity using information collected about them in connection with the Covered Assessment(s) and Educational Services. This may include Client providing student information for this purpose, including, for example, student email address, students providing a mobile number during the administration of the Covered Assessment with their phone number then being used to authenticate into the App, and/or Client providing an access code to each student. By providing their mobile number, the student authorizes College Board to text them to download the App, authenticate into the App, and about their scores, including when their scores are available for Covered Assessments. College Board does not use mobile numbers collected during Covered Assessments for any other purposes. Students are encouraged to provide an email address solely for App account recovery purposes. The foregoing is clearly explained to the student.

Client may direct College Board to automatically exclude its students from Connections for the Covered Assessment(s) under this Agreement by contacting College Board Customer Service at (866) 609-1369. Client may visit collegeboard.org/connections-tc for more information about Connections and for access to an opt-out form.
- Opt-outs must be submitted before the a deadline communicated by College Board in order to suppress displaying the Connections opt-in to students during their testing experience for the Covered Assessment(s).
- If a student had already opted-in to Connections under this Agreement before Client opted-out, the

student's data from Covered Assessment(s) under this Agreement will no longer be used for Connections upon College Board's implementation of Client's opt out

- If Client excludes its students from Connections and a student is not participating in Connections through other assessment(s) outside of this Agreement, the student will not receive any new content or messaging and anything previously delivered may be still accessed by the student.
- If Client opts-out, scores the student received on Covered Assessment(s) may still be used for Connections as described above if the student opted-in to Connections through an agreement between College Board and their school, district, or state which has access to Covered Assessment score(s).
- In some instances, Client's state may have elected to opt-out its students and College Board will abide by that exclusion for Client's students.
- If Client opts-out, Client may revoke this opt-out election by contacting College Board at SAT Customer Service at 888-SAT-HELP, +1-212-520-8600 (International), or email sateducator@collegeboard.org.
- Upon opt-out, students will still be able to use BigFuture School to receive Score Information and Recommendations.

Students may have opportunities to link from BigFuture School to BigFuture® and to other college and career planning services on College Board's website, www.collegeboard.org. Those services are not part of Educational Services and do not use student data collected under the Covered Assessments which are the subject matter of this Agreement or any DPA; the only exception being scores on College Board assessments, as all students have independent rights in their own test scores, as further acknowledged above. Students use BigFuture in their personal capacity and may need a personal College Board account to use certain features. Students with personal College Board accounts may also be able to access their scores through their personal accounts. Students may also have opportunities to copy data from their personal College Board accounts to Educational Services for use in the Educational Services. Such data copies shall be considered part of Educational Services, and those copies are subject to the same privacy rules as student data collected during Covered Assessments. collegeboard.org/privacycenter.

COLLEGE BOARD'S
COLLEGE READINESS AND SUCCESS AGREEMENT #: SF CONTRACT #

THIS AGREEMENT, including all appendices, exhibits, and schedules attached hereto (this "Agreement"), is as of the date this Agreement is fully executed ("Effective Date"), by and between _____ ("Client") and College Board ("College Board").

WHEREAS, College Board shall make available, and Client may order the following College Board exams, products, and services related to College Board's College Readiness and Success System.

NOW, THEREFORE, in consideration of the foregoing, the mutual covenants and undertakings contained herein, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties, intending to be legally bound, hereby agree to the following:

1.0 Services. College Board shall furnish Client with the exams, products, licenses, services and/or materials (collectively, "Services") in accordance with the applicable schedules, which outline the Services hereunder, attached hereto and incorporated herein by this reference ("Schedule"). If Client has additional orders after the Effective Date of this Agreement, and during the Term (as defined in Section 2.1), the parties agree such Services shall be added by an addendum signed by both parties.

2.0 Term & Termination.

2.1 Term. This Agreement shall be for a term beginning as of this _____ and, unless sooner terminated as provided herein, will expire on _____ ("Initial Term"). Client may renew this Agreement in twelve (12) month increments ("Renewal Term"), upon notice to College Board of its intent to renew within thirty (30) days prior to the expiration date of this Agreement. During any Renewal Term, this Agreement shall be subject to College Board's then-current fees and policies at the time of renewal. The Initial Term and each subsequent Renewal Term shall be collectively referred to as the "Term." If, during the Term, Client decides to change to the administration of a digital College Board assessment, College Board reserves the right to attach an additional schedule specific to such administration, containing operational policies and any additional terms and conditions.

2.2 Termination. If either party breaches any of the provisions of this Agreement (including but not limited to Client's failure to make any payment when due), either party shall have the right to give the other party written notice to cure such breach within thirty (30) days and, if such breach is not cured within a thirty (30) day period, either party shall have the right to terminate this Agreement, without waiver of any other remedy, whether legal or equitable; provided, however, if Client breaches the Representations and Warranties or Ownership of Intellectual Property, or both, then College Board shall have the right to terminate this Agreement immediately.

2.2.1 Rights After Termination. If any Schedule is terminated for any reason, all rights granted to Client hereunder with respect to the Services under that Schedule shall cease, and Client shall; (a) immediately cease all use of the applicable Services and purge any and all software, content, and materials from Client's computer systems, storage media and files, and all copies thereof, as applicable, and (b) promptly return or destroy, at College Board's direction, content and materials, and all copies thereof, and all other confidential information of College Board then in Client's possession or under Client's control. Upon termination of this Agreement, College Board shall terminate Client's access to any systems to which Client has access under this Agreement.

2.2.2 Partial Payment Upon Termination. Client will compensate College Board for all Services, including any costs associated with the initial deployment of resources in preparation for

providing the Services under this Agreement, through the effective date of any termination in accordance with invoices issued or to be issued by College Board.

2.2.3 Availability of Services. In addition to its other rights hereunder, College Board may cease making certain Services commercially available at any time by providing Client sixty (60) days written notice. In such event, College Board will cease furnishing such Services under this Agreement and this Agreement shall continue in full force and effect, except for provisions specifically affecting such Services . College Board will refund Client any fees paid for the unused portion of such Services .

3.0 Fees and Payment. Client shall pay those fees set forth in each Schedule for the Services furnished during the 2025-2026 implementation year. Unless otherwise indicated in a Schedule, payment terms are Net 30.

4.0 Taxes. Client agrees to pay any sales, use, value added or other taxes or import duties (other than College Board's corporate income taxes) based on, or due as a result of, any fees paid to College Board under this Agreement, unless Client is exempt from such taxes as the result of Client's corporate or government status and Client has furnished College Board with a valid tax exemption certificate.

5.0 Representations and Warranties.

5.1 Authority. Client represents and warrants that it is empowered under applicable state laws to enter into and perform this Agreement and it has caused this Agreement to be duly authorized, executed, and delivered.

5.2 College Board Services Warranty. College Board represents and warrants that it shall perform its obligations under this Agreement in a professional, workmanlike manner.

5.3 College Board Disclaimer of Implied Warranties. EXCEPT AS PROVIDED ABOVE, COLLEGE BOARD MAKES NO WARRANTIES WHATSOEVER AND PROVIDES THE SERVICES, AS APPLICABLE, ON AN "AS IS" AND "AS AVAILABLE" BASIS. COLLEGE BOARD HEREBY DISCLAIMS ALL OTHER WARRANTIES, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT OF THIRD PARTY RIGHTS. COLLEGE BOARD DOES NOT WARRANT THE OPERATION OF THE DELIVERABLES TO BE UNINTERRUPTED OR ERROR-FREE OR THAT ALL DEFICIENCIES OR ERRORS ARE CAPABLE OF BEING CORRECTED. FURTHERMORE, COLLEGE BOARD DOES NOT WARRANT OR MAKE ANY REPRESENTATIONS REGARDING THE USE OF THE SERVICES OR THE RESULTS OBTAINED THEREFROM OR THAT THE SERVICESWILL SATISFY CLIENT'S REQUIREMENTS.

6.0 Limitation of Liability. TO THE EXTENT PERMITTED BY LAW, AND NOTWITHSTANDING ANY OTHER PROVISION OF THIS AGREEMENT, THE TOTAL LIABILITY, IN THE AGGREGATE, OF COLLEGE BOARD AND ITS OFFICERS, TRUSTEES, PARTNERS, EMPLOYEES, AGENTS AND COLLEGE BOARD'S SUBCONTRACTORS AND CONSULTANTS, AND ANY OF THEM, TO CLIENT AND ANYONE CLAIMING BY, THROUGH OR UNDER CLIENT, FOR ANY AND ALL CLAIMS, LOSSES, COSTS, OR DAMAGES WHATSOEVER ARISING OUT OF, RESULTING FROM OR IN ANY WAY RELATED TO THIS AGREEMENT OR THE WORK PERFORMED BY COLLEGE BOARD PURSUANT TO THIS AGREEMENT FROM ANY CAUSE OR CAUSES, INCLUDED BUT NOT LIMITED TO THE NEGLIGENCE, PROFESSIONAL ERRORS OR OMISSIONS, STRICT LIABILITY OR BREACH OF CONTRACT OR WARRANTY EXPRESS OR IMPLIED OF COLLEGE BOARD OR COLLEGE

BOARD'S OFFICERS, TRUSTEES, PARTNERS, EMPLOYEES, AGENTS, SUBCONTRACTORS OR CONSULTANTS OR ANY OF THEM, SHALL NOT EXCEED THE ACTUAL AMOUNT PAID TO COLLEGE BOARD UNDER THIS AGREEMENT FOR THE SPECIFIC SERVICE SUBJECT TO THE DAMAGES CLAIM.

IN NO EVENT SHALL EITHER PARTY, THEIR AFFILIATES OR THEIR SUBCONTRACTORS BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL, EXEMPLARY, OR PUNITIVE DAMAGES (INCLUDING, BUT NOT LIMITED TO, ANY DAMAGES FOR LOSS OF PROFITS OR SAVINGS, LOSS OF USE, BUSINESS INTERRUPTION OR THE LIKE), EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

7.0 Indemnification. To the extent permitted by law and notwithstanding any other provision of this Agreement, Client agrees to indemnify, hold harmless, and defend College Board from and against any and all liabilities, demands, claims, fines, penalties, damages, forfeitures, and suits, together with reasonable attorneys' and witnesses' fees and other costs and expenses of defense and settlement, which College Board may incur, become responsible for or pay out as a result of death or bodily injury or threat thereof to any person, destruction of or damage to any property, any violation of local state or federal laws, regulations, or orders, or any other damages claimed by third parties (collectively, "Damages") provided, however, that Client shall not be obligated to indemnify College Board to the extent such Damages are caused directly by the gross negligence or willful misconduct of College Board.

8.0 Ownership of Intellectual Property. Client agrees and acknowledges that all intellectual property provided under or pertaining to this Agreement, including, but not limited to, any College Board publications, College Board website(s), CD-ROMs, videos, examinations, and all items contained therein, including all copies thereof, all data and score reports and any parts thereof, all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights are the sole and exclusive property of College Board. Nothing in this Agreement should be interpreted to indicate that College Board is passing its proprietary rights in and to College Board Intellectual Property to the Client except as specifically provided under a particular Schedule.

9.0 Miscellaneous.

9.1 Cooperation. Client shall cooperate fully with College Board, its agents, consultants, and subcontractors and provide all assistance as reasonably necessary for College Board to furnish the Services as applicable, including but not limited to: (a) fulfilling its obligations under the applicable Schedule and (b) other assistance reasonably required by College Board to fulfill its obligations under this Agreement.

9.2 Force Majeure. Neither party shall be considered in default in the performance of its obligations under this Agreement to the extent that performance of its obligations is prevented or delayed in whole or in part by any cause beyond its reasonable control, whether foreseeable or not, including, without limitation, acts of God, acts or omissions of governmental authorities, strikes, lockouts or other industrial disturbances, acts of public enemies, terrorism, wars, blockades, riots, civil disturbances, curtailment of transportation, Client's failure to cooperate as described in Section 9.1 (Cooperation), pandemics or epidemics including without limitation COVID-19 virus or new strains of the COVID-19 virus, floods, hurricanes, tornadoes, environmental or nuclear contamination, and any other similar acts, events, or omissions (each a "Force Majeure Event") that make it illegal, impracticable, inadvisable, unsafe, or impossible for a party to perform its obligations under this Agreement, provided that College Board shall have a duty to reasonably mitigate, or cause to be mitigated, any such disruptions (or parts thereof). College Board's obligation to furnish the Services shall be suspended (or reduced, as applicable) during the period

and to the extent that provision of the Services is disrupted by the Force Majeure Event, without such suspension or disruption constituting a material breach of its obligations under this Agreement.

9.3 Governing Law and Choice of Forum. This Agreement shall be construed in accordance with the terms and conditions set forth in this Agreement and the law of the State of New York without regard to choice or conflict of laws principles that would cause the application of any other laws. Any dispute or controversy arising out of or relating to this Agreement or otherwise shall be determined by a court of competent jurisdiction in New York County, New York State (or the Federal Court otherwise having territorial jurisdiction over such County and subject matter jurisdiction over the dispute), and not elsewhere, subject only to the authority of the Court in question to order changes of venue; provided, however, that prior to the instigation of any such action (other than an action for equitable relief) a meeting shall be held at a mutually agreed upon location, attended by individuals with decision-making authority to attempt in good faith to negotiate a resolution of the dispute. If within forty-five (45) days after such meeting the parties have not succeeded in resolving the dispute, either party may proceed at law, or in equity, in a court of competent jurisdiction. Client agrees not to demand a trial by jury in any action, proceeding or counterclaim.

9.4 Notices. All notices or other communications hereunder shall be deemed to have been duly given and made if in writing and if served by personal delivery upon the party for whom it is intended on the day so delivered, if delivered by registered or certified mail, return receipt requested, or by courier service on the date of its receipt by the intended party (as indicated by the records of such of the U.S. Postal Service or the courier service), or if sent by e-mail, or if not a business day, the next succeeding business day, provided that the email sender retains confirmation of a "read-receipt" which acknowledges recipient's opening of such email, or if not available, promptly confirms by telephone confirmation thereof, to the person at the address set forth below, or such other address as may be designated in writing hereafter, in the same manner, by such person:

To College Board:	**With a copy to**	**To Client:**
K-12 Contract Management College Board 250 Vesey Street New York, NY 10281 Tel: (212) 713-8000 Contractsmanagement@collegeboard.org	Legal Department College Board 250 Vesey Street New York, NY 10281 Tel: (212) 713-8000 Legalnotice@collegeboard.org	

9.5 Publicity. Each party agrees to promptly inform the other party of all media inquiries prior to responding thereto and to permit the other party to review and approve prior to release any press releases regarding the Services provided for under this Agreement.

9.6 Relationship of the Parties. The relationship of the Client and College Board is that of independent contractors. Neither party nor their employees are partners, agents, employees, or joint ventures of the other party. Neither party shall have any authority to bind the other party to any obligation by contract or otherwise. College Board, its employees, and agents shall not be considered employees of the Client while performing these Services and will not be entitled to fringe benefits normally accruing to employees of the Client. Client and College Board recognize and agree that College Board is an independent contractor.

If the Client is using federal funds to pay for all or a portion of the Services furnished by College Board under this Agreement, Client acknowledges and agrees that College Board shall not be categorized as a "subrecipient" receiving a federal award as defined by OMB Circular Subpart A.210(c) of Circular No. A-133. College Board shall be defined as a "vendor" that provides good and services within normal business operations, provides similar goods or services to other purchasers and operates in a competitive environment. Client acknowledges and agrees that the substance of the relationship with College Board is that of a vendor not a subrecipient.

9.7 Third-Party Rights. Nothing contained in this Agreement, express or implied, establishes or creates, or is intended or will be construed to establish or create, any right in or remedy of, or any duty or obligation to, any third party.

9.8 Survival. It is agreed that certain obligations of the parties under this Agreement, which, by their nature would continue beyond the termination, cancellation, or expiration of this Agreement, shall survive termination, cancellation, or expiration of this Agreement, including without limitation, payment, ownership of intellectual property, representations and warranties, limitation of liability, confidential and proprietary information, indemnification, term and termination, and Section 9 (Miscellaneous) herein.

9.9 Amendment; Waiver. Any provision of this Agreement may be amended or waived if, and only if, such amendment or waiver is in writing and signed, in the case of an amendment, by the parties, or in the case of a waiver, by the party against whom the waiver is to be effective. No failure or delay by any party in exercising any right, power, or privilege hereunder shall operate as a waiver thereof nor shall any single or partial exercise thereof or the exercise of any other right, power, or privilege. Except as otherwise provided herein, the rights and remedies herein provided shall be cumulative and not exclusive of any rights or remedies provided by law.

9.10 Severability. The provisions of this Agreement shall be deemed severable and the invalidity or unenforceability of any provision shall not affect the validity or enforceability of the other provisions hereof. If any provision of this Agreement, or the application thereof to any person or entity or any circumstance, is invalid or unenforceable, (a) a suitable and equitable provision shall be substituted therefor in order to carry out so far as may be valid and enforceable provision and (b) the remainder of this Agreement and the application of such provision to other persons, entities, or circumstances shall not be affected by such invalidity or unenforceability, nor shall such invalidity or unenforceability affect the validity or enforceability of such provision, or the application thereof, in any other jurisdiction.

9.11 Order of Precedence. In the event of conflict between the terms and conditions of any Schedule and this Agreement the terms and conditions of the Schedule shall prevail. The parties acknowledge and agree that each shall construe the terms, covenants, and conditions set forth in this Agreement, including each Schedule, as consistent with one another insofar as possible, so as to give effect to the fullest extent possible to each particular clause. Client shall remit any required Client-issued purchasing documents such as a contract or purchase order prior to the scheduled delivery of any Services to ensure prompt payment for Services received under this Agreement ("Client Purchase Order"). Notwithstanding anything to the contrary, the parties hereby acknowledge and agree that the Client Purchase Order shall be subject to the terms and conditions of this Agreement and this Agreement shall supersede any terms and conditions included in the Client Purchase Order; and further, Client understands that College Board is accepting the Client Purchase Order solely to effectuate payment but does not agree to accept any terms and conditions included in the Client Purchase Order. Client acknowledges and agrees that if Client is required to provide a Client Purchase Order, College Board may delay and/or withhold

furnishing Services if Client fails to issue the Client Purchase Order for such Services, as applicable, prior to the scheduled delivery date for such Services.

9.12 Headings. Headings contained in this Agreement are for reference purposes only. They shall not affect in any way the meaning or interpretation of this Agreement.

9.13 Integration, Execution and Delivery. This Agreement includes the Schedules attached hereto and constitutes the entire agreement between College Board and Client and supersedes all prior written or oral understandings, bids, offers, negotiations, or communications of every kind concerning the subject matter of this Agreement, including any Client Purchase Order. No course of dealing between parties and no usage of trade shall be relevant to supplement any term used in this Agreement. Acceptance or acquiescence in a course of performance rendered under this Agreement shall not be relevant to determine the meaning of this Agreement and no waiver by a party of any right under this Agreement shall prejudice that party's exercise of that right in the future. This Agreement may be executed through signatures to any number of counterparts, each of which shall be deemed an original, which together will constitute one Agreement. Delivery of an executed counterpart of this Agreement by electronic transmission, including through Docusign, shall be equally as effective as delivery of an original executed counterpart of this Agreement. Any party delivering an executed counterpart of this Agreement by electronic transmission also shall deliver an original executed counterpart of this Agreement (except if the parties are using Docusign), but the failure to deliver an original executed counterpart shall not affect the validity, enforceability, and binding effect of this Agreement. The foregoing execution and delivery shall apply to this Agreement.

CLIENT NAME	**COLLEGE BOARD**
Signature	Signature
Name	Name
Title	Title
Date	Date

SAT® SCHOOL DAY PROGRAM
SHELF SCHEDULE

I. BACKGROUND

College Board owns and delivers its national standardized SAT test to students. This Schedule outlines how Client sponsors a SAT School Day administration at its schools ("Participating Schools") for students during a certain designated period ("Testing Window") and what SAT data and reports may be provided to Client through our online data portal (the 'Program').

II. PROGRAM MATERIALS AND INFORMATION

College Board shall furnish SAT School Day materials and information as follows:

1. **Materials for Students:**
   a. Link to the Student Guide.
   b. SAT test materials delivered via College Board's Digital Testing Platform, BlueBook™. Assessment score report delivered as a PDF to Client via College Board's K-12 Reporting Portal.
   c. The ability to send SAT scores to colleges, scholarship programs and other designated score recipients via College Board website, collegeboard.org in the SAT section.
   d. Information from College Board to help students understand and navigate post-secondary and career pathways and opportunities through a College Board mobile application, as described in Annex 1 attached.
   e. Access to SAT Practice Tools and Support as set forth below.
   f. Access to Bluebook and the test at school (Client will have access to a digital test preview to demonstrate the navigation and tools available to students in Bluebook).

2. **Materials for Participating Schools**:
   a. Materials to support test administration.
   b. Client will receive online access to Test Day Toolkit (TDTK), College Board's digital test administration tool, and a downloadable PDF of the School Day testing publications.
   c. Access to a digital test preview to demonstrate the navigation and tools available to students in the digital testing platform.
   d. Materials to support students receiving accommodations which require a paper test, including applicable instructions and the paper testing materials.
   e. Access to individual student score reports and aggregate score reports, and downloadable student data file delivered via College Board's K-12 Reporting Portal.
   f. Access to AP Potential™ via College Board website.
   g. Insights and reporting on students' participation in the College Board mobile application and insights to support student engagement in exploring college and career information and opportunities, as further described in Annex1.

3. **Reports for District:**
   a. Access to individual student score reports and aggregate score reports, and downloadable student data file, delivered via College Board's K-12 Reporting Portal.
   b. Access to AP Potential via College Board website.

4. **Delivering SAT Practice Tools and Support.** In addition to the free practice tools available at http://sat.collegeboard.org/practice, all students will have access to a) full-length practice tests in Bluebook and b) focused practice resources through College Board's collaboration with Khan Academy. Practice materials for the SAT exam are available at the Khan Academy website at https://www.khanacademy.org/digital-sat. Client and students shall use the Khan Academy practice tool and materials in accordance with Khan Academy's guidelines.

Additional SAT Readiness products (e.g., publications) and services (e.g., Professional Development Workshops) are not included as part of the Program. Client may purchase these products and services separately.

III. CLIENT RESPONSIBILITIES

1. In connection with SAT School Day, Client agrees that it will, or will ensure each Participating School will:

a. Comply with the Legal Terms for Educators and Institutions at https://privacy.collegeboard.org/educator-legal-terms?navId=gf-edterms.
b. Review the information in Annex 1 below and incorporated herein about College Board's mobile application available for students.
c. Place orders by the ordering deadline. Orders cannot be decreased after the ordering deadline for SAT School Day.
d. Designate personnel to act as a Test Coordinator, SSD Coordinator, Technology Coordinator, Technology Monitors, Proctors and Room or Hall Monitors (collectively, "Designated Personnel").
e. Ensure compliance with the requirements for training and other guidelines in publications shared with you.
f. Verify and update, if necessary, the Test Coordinator name and contact information.
g. Submit Eligibility Forms for students with disabilities who do not already have a College Board SSD Eligibility Code (see calendar for deadlines).
h. Ensure that registered students are provided a link to the online SAT Student Guide (https://satsuite.collegeboard.org/media/pdf/sat-student-guide.pdf) **at least two weeks before the anticipated start of testing.**
i. Administer the test to students under standard College Board national test administration and security policies, procedures and protocols as specified in training and/or instructional material shared with Client and in compliance with Designated Personnel Guide directions.
j. Administer the test only during the authorized Testing Window for which the school is registered.
k. Receive emails from College Board regarding the tests and their related offerings and share emails and coordinate communications with other staff at your schools as necessary.
l. There is always a risk of disruption during testing, including, without limitation, computer issues. College Board has endeavored to put in place procedures to allow administrators and students to recover from such disruption and complete testing. Despite such efforts, Client understands that there are situations where the only option is to complete testing on the other days during the testing window. This is Client's sole remedy in relation to such disruption.
    1. Testing may not be available in case of severe weather or other disruptions, including without limitation epidemics, that require lengthy closures at your school that extend beyond the end of the Testing Window.

IV. DIGITAL AND PAPER TESTING REQUIREMENTS; ACCOMMODATIONS

1. **Digital Testing Requirements**.
   a. The Test Coordinator will ensure compliance with training requirements for all testing staff at each Participating School who will complete all required College Board Test Day Staff Training and provide training access to other supporting staff. Client will ensure compliance with training requirements for all testing staff.
   b. The Technology Coordinator for each Participating School will ensure the successful and accurate completion of all digital readiness and technology setup activities. These include: a dedicated device for Test Coordinator(s) to monitor test activities, a proctor device to administer the digital test in each testing room, and devices for each test-taking student with College Board's Digital Testing Platform, Bluebook™, installed. Additional information on the devices required for test day, including recommendations on battery and power source, supported operating systems, supported web browsers, and network configuration can be found at https://bluebook.collegeboard.org/technology/devices. Client must ensure that each Participating School can meet College Board Digital Testing Requirements as outlined on the referenced website.
   c. Client shall complete College Board's Registration process for each student scheduled to test by the registration deadline.
   d. If you are administering the test with accommodations requiring the use of an approved assistive technology device, students should pre-test the device in the Student Digital Test Preview prior to test day to ensure operational functionality. If the digital accommodation supports within the Digital Test preview do not meet students' testing needs, Client should arrange for alternate accommodation supports.

2. **Paper Tests**

   a. College Board may provide a limited number of paper test books for students requiring accommodations that cannot be delivered as a digital test or otherwise as approved by College Board.
   b. Client, or Participating Schools, as applicable, will keep all test books in locked storage until test date.
   c. Participating Schools will collect all test books at the end of the test.
   d. Participating Schools will promptly complete the process for submitting responses for students that test using paper materials in accordance with the policies and processes provided by College Board to Test or SSD Coordinators.
   e. Participating Schools will promptly return all paper test materials in accordance with the policies and processes provided by College Board to Test Coordinators.

3. ACCOMMODATIONS

Accommodations for students with disabilities will be granted and administered according to College Board's standard eligibility and administration procedures. Students must apply for accommodations under College Board's Services for Students with Disabilities (SSD) program and must follow the SSD program's published procedures, which can be found at https://accommodations.collegeboard.org/. Only College Board-approved accommodations are permitted. Students who use accommodated test materials without College Board's prior approval may not receive scores or may otherwise have their scores cancelled or invalidated, and that cannot be reported to colleges, scholarship programs and other designated score recipients. Client allowed accommodations that prevent reportable scores cannot be reported to colleges, scholarship programs, and other designated score recipients. Client will be responsible for ensuring that an

appropriate accommodations coordinator ('SSD Coordinator') is designated for each Participating School to facilitate the application for and administration of approved accommodations. SSD Coordinators are responsible for notifying students when and where to report on test day. Early testing or testing at times other than those published by College Board is not permitted under any circumstances. The 'SSD Coordinator Form' (used to establish an SSD Coordinator) is available at SSD Coordinator Form. Students with accommodations previously approved by College Board, and who have a College Board-issued SSD code, do not need to reapply for accommodations under this Program. English Learner (EL) Supports like translated directions and the use of word-to-word glossaries do not require approval or special test format.

V. REQUIRED INFORMATION AND TRAINING

1. Client shall furnish College Board with: (a) a list of Participating Schools with their respective College Board school code online in College Board's SAT Suite Ordering and Registration system located at the following location ordering.collegeboard.org. ("SSOR"), (b) a list of all students registered for the exam are submitted online using the registration template in the College Board registration system located at the following location ordering.collegeboard.org and (c) the Client's contacts entered online in SSOR.

Changes to Participating Schools. Changes to the list of Participating Schools must be made online in SSOR no later than **two weeks prior to the beginning of the testing window.**

If Client's omits schools from the List of Participating Schools, then such schools shall not be covered under this Schedule.

2. **Training of Designated Personnel at the Participating Schools.** College Board will make available online all necessary training and/or instructional materials to Designated Personnel. The required training and/or instructional materials will be made available online by College Board to Client and **must be completed two weeks before the test administration date**.

Designated Personnel are required to utilize College Board's Test Day Toolkit (TDTK) application in connection with the administration of the SAT. Designated Personnel are required to adhere to all of College Board's procedures, policies, and protocols related to national test administrations as specified in the SAT School Day Coordinator training and instructional materials. College Board reserves the right to cancel the administration of the Program at any Participating School where any Designated Personnel fails to complete such training prior to the scheduled test administration.

VI. TESTING

1. SAT Testing Window. Client has agreed to administer the SAT to registered students during the Testing Window(s) selected by Client in SSOR. In order to test, Client, or students, as applicable, will be required to install Bluebook on school owned devices that meet College Board technical specifications. Students using personal devices will be required to install Bluebook on compatible devices. Client shall provide internet access to each testing device.

2. Administering the SAT. The SAT will be administered to students under standard College Board national test administration and security protocols as specified in the SAT School Day testing publications and SAT School Day Test Coordinator training and instructional materials, unless otherwise stated in this Schedule, and will result in scores that are reportable to colleges for admissions purposes. In accordance with College Board policies, any test irregularity, including mis-administrations or security breaches, will be thoroughly investigated and may result in score cancellations. Client is responsible for making all necessary arrangements to ensure that the testing environment and the security of all test materials satisfy

College Board requirements as specified in the SAT School Day Coordinator training and instructional materials. The test will be administered by Client-employed personnel, who will not receive additional remuneration from College Board. Client personnel must use TDTK in connection with the administration of the SAT. This Agreement does not guarantee that all students registered by Client for the Program will actually test. It is the responsibility of Client to encourage students to complete the program. students will follow the guidelines in applicable College Board digital student materials.

3. Client Testing Delays. Participating Schools select an administration date within a Testing Window for the SAT School Day. Should an event occur that would require Participating School(s) to close for reasons beyond the reasonable control of such Participating School(s) (for example, including, but not limited to, severe weather, extended power outages, or a teacher's strike) (a "Delay Event"), the Participating School(s) should adjust testing until later in the Testing Window.

Client understands that by selecting the last week of a Testing Window as their main administration date, if there is a Delay Event, there may be no additional SAT School Day test dates. In such cases, this Agreement remains in full force and effect. No additional administration of the assessment will be made available after the Testing Window.

VII. COLLEGE BOARD COLLECTION, USE AND DISCLOSURE OF DATA

1. Client acknowledges and agrees that the data collected from the administration of the assessment ordered under this Agreement is subject to the terms below, which are further described within College Board's privacy policies, available at https://privacy.collegeboard.org.

College Board shall collect from Client, or Participating School, as applicable, the following student data in connection with the registration of the assessments you are ordering under this Agreement, with those asterisked required for registration. Client and College Board agree to comply with the Family Educational Rights and Privacy Act, 20 U.S.C. s. 1232g, and its implementing regulations, 34 C.F.R. pt. 99 ("FERPA"), as applicable. Client will obtain any and all consents necessary for students to participate in the assessment(s), if any.

- *First and last name
- Middle initial
- *Date of Birth
- *Attending institution (AI Code)
- *Grade
- *Gender
- *Test administration indicator (that is, which assessment)
- *Season for testing
- *Student identifier

College Board may collect additional data and information from students in connection with the assessments, all of which is optional and subject to College Board's privacy policies. *See Annex 1 for more information.*

For digital testing, College Board will receive certain information about the device used by the student and monitor and capture actions students take when using Bluebook to ensure the device is compatible for test security purposes, for test validation and research, as well as to develop and improve College Board products and services. We may disclose this information but only in aggregated and de-identified form.

2. College Board may also collect, retain, use and share students' personally identifiable information to perform this Agreement including for the purposes outlined below.

a. For SAT, State Scholarship Organizations: State affiliated scholarship organizations may receive student data, including SAT Score(s), solely for the purposes of eligibility for a scholarship or recognition program. College Board will enter into an agreement with any such state agency for these purposes. College Board is not involved in setting the criteria for any state scholarship programs nor awarding decisions.
b. For SAT, State Direct Admissions Programs: State government agencies that are operating direct admissions programs on behalf of their state public higher education institutions may receive student data, including SAT score(s), solely for the purposes of facilitating and administering direct admissions on behalf of those institutions. College Board will enter into an agreement with any such state agency for these purposes. College Board is not involved in setting the criteria for any direct admission programs or offers, nor is College Board involved in any decision by the state agency or the state public higher education institution(s) to make (or decline to make) any direct admission offers. *See Annex 1.*
c. For SAT, National Presidential Scholars: Data about eligible students are shared with the US Department of Education for purposes of the U.S. Presidential Scholars Programs. College Board will enter into an agreement with the US Department of Education for these purposes.
d. For PSAT 10 and PSAT/NMSQT, National Recognition Programs: College Board uses student data to determine a student's eligibility to apply for and receive its National Recognition Programs, award(s), for administration of the National Recognition Program, and share information with the student, their high school and district about the students' eligibility and recognition status.
e. For PSAT/NMSQT, College Board will share scores, data derived from scores, certain student demographic information, and other information provided by students during testing with the National Merit Scholarship Corporation (NMSC) in order for NMSC to determine whether students are eligible for its National Merit Scholarship Program and administer this program in accordance with the PSAT/NMSQT Student Guide and www.nationalmerit.org. This includes NMSC sharing information with the students and their high school about the students' eligibility and recognition status.
f. Score Reporting to Students: College Board will report to the student the score achieved on assessments which are the subject matter of this Agreement, insights from those scores, and their AP Potential.
g. SAT Score Sends: Students may identify institutions to receive their SAT scores. Student scores and basic demographic information sufficient for identity matching are only provided to higher education institutions and scholarship organizations when authorized by students.
h. Score Report to Schools, Districts and State: Schools, Districts and the State will have access, including through College Board's online reporting portals, to students' assessments score(s) and data derived from the score(s) the student received on past and future College Board assessments, consistent with disclosures to the students.
i. Accommodations: College Board uses student data to process applications for testing accommodations and to communicate with the SSD coordinator and students regarding accommodations.
j. Test Security: College Board may use student data to identify and investigate potential test security incidents, communicate with students about any such incidents, and protect and enhance test security. College Board may disclose the results of test security investigations with third parties, including to the student's school, any score recipient, college, higher education institution or

agency, scholarship organization, potential score recipient government agency in the U.S or abroad, parents, legal guardians, or law enforcement.

k. Research: College Board may use de-identified student data for psychometric and educational research purposes to evaluate the validity of our assessments and ensure that tests are unbiased in terms of race, gender, and culture. College Board may use de-identified data to demonstrate the effectiveness of College Board programs and services. College Board may also use data to maintain, develop, support, improve and diagnose our services and applications.
l. Operational Third Parties: College Board may use and disclose personally identifiable information to third parties providing services to College Board as necessary for its performance of the services in this Agreement and others necessary to administer the SAT Suite and related services. These vendors cannot relicense, sell, rent, or otherwise repurpose the information. These organizations have contractual requirements to protect personally identifiable information from unauthorized access, use, or disclosure.
m. Other: College Board may disclose student data as required by law, when we believe in good faith that it's necessary to protect our rights, protect an individual's safety or the safety of others, investigate fraud, or respond to a government request.

College Board may retain information as needed for legitimate educational purposes, to provide services to students or their educational institution, comply with legal obligations, resolve disputes, and enforce College Board's agreements, which survive this Agreement.

Client acknowledges that students may desire to continue and further develop a direct relationship beyond the administration of SAT Suite of Assessments for the purposes of students' college and career readiness by utilizing College Board's services available to all students. The terms and conditions of this Agreement related to the collection, maintenance, use, and disclosure of data shall only apply to the data College Board receives in connection with this Agreement. Nothing in this Agreement, or any data privacy agreement, is intended to diminish or interfere with student's personal rights in their assessment data, as students have rights independent of this Agreement to access, retain, and use their test scores, including for tests which are the subject matter of this Agreement, and no provisions in this Agreement are intended to address or cover data that College Board has, or may receive, for services which are outside the scope of this Agreement.

VIII. DATA PROTECTION AND SECURITY MEASURES

1. Data Protection. College Board shall take actions to protect the security and confidentiality of personally identifiable information that may be obtained pursuant to this Agreement in a manner consistent with industry standards. College Board will maintain a SOC 2 Type II report.

College Board has security measures in place designed to help protect against loss, misuse and alteration of the data under College Board's control. College Board shall develop, implement, maintain and use reasonably appropriate administrative, technical and physical security measures to preserve the confidentiality, integrity and availability of personally identifiable information that may be obtained pursuant to this Agreement, as determined by College Board. College Board shall host content in a secure environment that uses Web Application Firewalls/security groups and other advanced technologies designed to prevent interference or access from outside intruders.

College Board encrypts personally identifiable information that may be obtained pursuant to this Agreement in transmission and storage where technically feasible and when designed as being appropriate by College

Board. If not, other security controls may be implemented to reduce risk, mitigate risk, or otherwise protect the data as determined solely by College Board. When College Board's platforms are accessed using a supported web browser, Transport Layer Security("TLS") or equivalent technology protects information while in transit, using both server authentication and data encryption to help secure the data and limit availability to only authorized users.

Client shall be responsible for removing access to College Board's platforms for any personnel who no longer should have access, or promptly notifying College Board to request removal of any such access.

2. Security Measures. College Board will extend the confidentiality requirements and security measures identified in this Agreement by contract to subcontractors used by College Board, if any, to provide services related to this Agreement. College Board will use appropriate and reliable storage media, regularly backup data and retain such backup copies for the duration of this Agreement, as defined by College Board. You acknowledge that College Board utilizes cloud hosting service providers throughout its infrastructure. College Board will store personally identifiable information that may be obtained pursuant to this Agreement in the United States where technically feasible and reasonable, as determined solely by College Board.

IX. COLLEGE BOARD CUSTOMER SERVICE

1. Dedicated SAT School Day Customer Service for Educators: College Board will provide Client with telephone customer service support for educators. Specifically, College Board will provide:

a. Step-by-step assistance with College Board online tools including SSD System, SSOR and Test Day Toolkit (TDTK);
b. Assistance with completing required forms such as School Code Request Form;
c. Assistance with technical complications for Bluebook Installation and Registration login, for example; and
d. Feedback mechanism for counselors.

Dates and Times of Service: **Available three months prior to primary test date**. Standard hours of operation: Monday through Friday 9:00 a.m. to 6:00 p.m. Eastern Standard Time. Customer service for the SAT Program can also be accessed online at the following web address: https://satsuite.collegeboard.org/contact-us

X. ADDITIONAL SAT SCHOOL DAY TERMS AND CONDITIONS

1. Ownership of Intellectual Property. College Board is the exclusive owner of all rights in and to the digital Testing Platform, Bluebook, Test Day Toolkit (TDTK), K-12 Reporting Portal, AP Potential, guidebooks for students and Designated Personnel, SAT exam, SAT with Essay exam, PSAT/NMSQT, PSAT 10, and PSAT 8/9 examinations, all individual test items (questions) contained therein, including all copies thereof, test booklets, all examination materials and all data collected therefrom, including but not limited to student scores derived from the exam, are at all times exclusively owned by College Board. In addition, College Board is the exclusive owner of AP Potential, College Board's mobile app described below, and all publications and reports associated with SAT exam, SAT with Essay exam, PSAT/NMSQT, PSAT 10 and PSAT 8/9 described in this Agreement including all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights, and all renewals and extensions thereof (all platforms, exams and related material referenced in this provision are collectively referred to as "College Board Intellectual Property"). Client acknowledges and agrees that nothing in this Agreement shall be interpreted to indicate that College Board is passing its proprietary rights in and to College Board Intellectual Property to Client.

Except as expressly provided herein, Client is prohibited from copying, disseminating, publishing, displaying or distributing in any form, or reproducing any questions from the assessments including from digital testing or paper test booklets (if used) in whole or in part, without the prior written consent of College Board.

2. SAT Suite Question Bank and License. The SAT Suite Question Bank provides educators with the ability to access released PSAT 8/9, PSAT 10, and SAT questions by content domain, and score bands are provided for each question. College Board will release at least one full "adaptive test panel" of content for each section of each assessment each year.

College Board grants Client a non-exclusive, limited and revocable license to use the SAT Suite Question Bank and any other released questions for the sole purpose of classroom teaching and internal reporting purposes. Client understands and acknowledges that the questions and answers explanation include College Board copyrighted content and may also include third party copyrighted content for which you may only use for the aforementioned purposes. Client acknowledges and agrees that it has no right to upload or post online, cache, reproduce, modify, display, edit, alter or enhance any portion of the SAT Suite Question Bank questions and answers or the third-party content in any manner unless it has express written permission from College Board and the owner of the third-party content.

College Board reserves the right to revoke the above license grant if Client violates the terms of the license. In addition, College Board shall not be liable to Client nor any third party for Client's use of the question and answers explanation (including but not limited to, any copyright infringement claims) beyond the scope of the license.

3. **Student Score Report License**. College Board hereby grants Client a limited, nonexclusive, nontransferable, non-assignable right to access and use the student score reports provided for the assessment(s) pursuant to this Agreement for the legitimate educational purposes of internal analysis, which includes your internal training sessions, as long as the data used during training preserves the confidentiality of students. Client may not use or distribute the score reports, or the data derived from them externally or to third parties other than the student without the express written consent of College Board.

XI. FEE CALCULATION

1. Fees. The fee calculation for this Schedule is based on Client selections in SSOR. Pricing adjustments that reduce the fee per test for an amount less than the retail price are provided at the sole discretion of College Board.

Clients will be charged the fee in the attached Budget Schedule based on the number of SAT School Day tests submitted. The test volumes and total cost indicated in the Budget Schedule are estimates.

College Board reserves the right to suspend ordering for the SAT Suite of Assessments if Client has an outstanding undisputed invoice(s) to College Board in an amount greater than $300 for more than 90 days from the invoice date. Clients who have been suspended will be precluded from ordering any SAT Suite of Assessments in College Board's online ordering system until the invoice(s) has been paid in full. Access will not be denied if there is a third party (your District or State or another school) responsible for the payment of such outstanding invoices.

2. Restrictions. No student participating under this Schedule will be assessed an individual fee for taking the SAT School Day exam.

XII. CLIENT CONTACT INFORMATION

	Primary[1]	Procurement[2]
Name:		
Title:		
Address:		
City/State/Zip:		
Phone:		
Fax:		
Email:		

[1] This is the person to whom College Board should direct primary communications.

[2] This is the person to whom College Board should send the contract for review and approval within the district procurement/contract department.

PSAT™ 10
SHELF SCHEDULE

I. BACKGROUND

College Board owns and delivers its national standardized tests to students. This Schedule outlines how a Client sponsors a PSAT™ 10 administration at its schools ("Participating Schools") for students and what data and reports may be provided to Client through our online data portal (the "Program").

II. PROGRAM MATERIALS AND INFORMATION

College Board shall furnish PSAT 10 materials and information as follows:

1. **Materials for Students:**
   a. Link to the Student Guide.
   b. PSAT 10 test materials delivered via College Board's Digital Testing Platform, BlueBook™, Assessment score report delivered as a PDF to Client via College Board's K-12 Reporting Portal.
   c. Information about recognition programs College Board.
   d. Information from College Board to help students understand and navigate post-secondary and career pathways and opportunities through a College Board mobile application, as described in Annex 1 attached.
   e. Access to SAT Practice Tools and Support as set forth below.
   f. Access to Bluebook and the test at school (Client will have access to a digital test preview to demonstrate the navigation and tools available to students in Bluebook).

2. **Materials for Participating Schools**:
   a. Materials to support test administration.
   b. Client will receive online access to test day toolkit (TDTK), College Board's digital test administration tool, and a downloadable PDF of the PSAT 10 testing publications.
   c. Access to a digital test preview to demonstrate the navigation and tools available to students in the digital testing platform.
   d. Materials to support students receiving accommodations which require a paper test, including applicable instructions and the paper testing materials.
   e. Access to individual student score reports and aggregate score reports, and downloadable student data file delivered via College Board's K-12 Reporting Portal.
   f. Access to AP Potential™ via College Board website.
   g. Insights and reporting on students' participation in the College Board mobile application and insights to support student engagement in exploring college and career information and opportunities, as further described in Annex1.

3. **Reports for District:**
   a. Access to individual student score reports and aggregate score reports, and downloadable student data file, delivered via College Board's K-12 Reporting Portal.
   b. Access to AP Potential via College Board website.

4. **Delivering SAT Practice Tools and Support.** In addition to the free practice tools available at http://sat.collegeboard.org/practice, all students will have access to a) full-length practice tests in Bluebook and b) focused practice resources through College Board's collaboration with Khan Academy. Practice materials for the SAT exam are available at the Khan Academy website at

https://www.khanacademy.org/digital-sat. Client and students shall use the Khan Academy practice tool and materials in accordance with Khan Academy's guidelines.

III. CLIENT RESPONSIBILITIES

1. In connection with PSAT 10, Client agrees that it will, or will ensure each participating school will:

a. Comply with the Legal Terms for Educators and Institutions at https://privacy.collegeboard.org/educator-legal-terms?navId=gf-edterms.
b. Review the information in Annex 1 below and incorporated herein about College Board's mobile application available for students.
c. Place orders by the ordering deadline. Orders cannot be decreased after the ordering deadline for PSAT 10.
d. Designate personnel to act as a Test Coordinator, SSD Coordinator, Technology Coordinator, Technology Monitor, Proctors and Room or Hall Monitors (collectively, "Designated Personnel").
e. Ensure compliance with the requirements for training and other guidelines in publications shared with you.
f. Verify and update, if necessary, the Test Coordinator name and contact information.
g. Submit Eligibility Forms for students with disabilities who do not already have a College Board SSD Eligibility Code (see calendar for deadlines).
h. Ensure that registered students are provided a link to the online PSAT 10 Student Guide (https://satsuite.collegeboard.org/media/pdf/official-student-guide-psat-10.pdf) **at least two weeks before the anticipated start of testing.**
i. Administer the test to students under standard College Board national test administration and security policies, procedures and protocols as specified in training and/or instructional material shared with Client and in compliance with Designated Personnel Guide directions.
j. Administer the test only during the authorized Testing Window for which the school is registered.
k. Receive emails from College Board regarding the tests and their related offerings and share emails and coordinate communications with other staff at your schools as necessary.
l. There is always a risk of disruption during testing, including, without limitation, computer issues. College Board has endeavored to put in place procedures to allow administrators and students to recover from such disruption and complete testing. Despite such efforts, Client understands that there are situations where the only option is to complete testing on the other days during the testing window. This is Client's sole remedy in relation to such disruption.
    1. Testing may not be available in the case of severe weather or other disruptions, including without limitation epidemics, that require lengthy closures at your school that extend beyond the end of the Testing Window.

IV. DIGITAL AND PAPER TESTING REQUIREMENTS; ACCOMMODATIONS

1. Digital Testing Requirements

a. The Test Coordinator will ensure compliance with training requirements for all testing staff at each Participating School who will complete all required College Board Test Day Staff Training and provide training access to other supporting staff. Client will ensure compliance with training requirements for all testing staff.
b. The Technology Coordinator for each Participating School will ensure the successful and accurate completion of all digital readiness and technology setup activities. These include: a dedicated device for Test Coordinator(s) to monitor test activities, a proctor device to administer the digital

test in each testing room, and devices for each test-taking student with College Board's Digital Testing Platform, Bluebook™, installed. Additional information on the devices required for test day, including recommendations on battery and power source, supported operating systems, supported web browsers, and network configuration can be found at https://bluebook.collegeboard.org/technology/devices. Client must ensure that each Participating School can meet College Board Digital Testing Requirements as outlined on the referenced website.

c. Client shall complete College Board's Registration process for each student scheduled to test by the registration deadline.
d. If you are administering the test with accommodations requiring the use of an approved assistive technology device, students should pre-test the device in the Student Digital Test Preview prior to test day to ensure operational functionality. If the digital accommodation supports within the Digital Test preview do not meet students' testing needs, Client should arrange for alternate accommodation supports.

2. Paper Tests

a. College Board may provide a limited number of paper test books for students requiring accommodations that cannot be delivered as a digital test or otherwise as approved by College Board.
b. Client, or Participating Schools, as applicable, will keep all test books in locked storage until test date.
c. Participating Schools will collect all test books at the end of the test.
d. Participating Schools will promptly complete the process for submitting responses for students that test using paper materials in accordance with the policies and processes provided by College Board to Test or SSD Coordinators.
e. Participating Schools will promptly return all paper test materials in accordance with the policies and processes provided by College Board to Test Coordinators.

3. ACCOMMODATIONS

Accommodations for students with disabilities will be granted and administered according to College Board's standard eligibility and administration procedures. Students must apply for accommodations under College Board's Services for Students with Disabilities (SSD) program and must follow the SSD program's published procedures, which can be found at https://accommodations.collegeboard.org/. Only College Board-approved accommodations are permitted. Students who use accommodated test materials without the College Board's prior approval may not receive scores or may otherwise have their scores cancelled or invalidated, and that cannot be reported to colleges, scholarship programs and other designated score recipients. Client will be responsible for ensuring that an appropriate accommodations coordinator ('SSD Coordinator') is designated for each Participating School to facilitate the application for and administration of approved accommodations. SSD Coordinators are responsible for notifying students when and where to report on test day. Early testing or testing at times other than those published by College Board is not permitted under any circumstances. The 'SSD Coordinator Form' (used to establish an SSD Coordinator) is available at SSD Coordinator Form. Students with accommodations previously approved by College Board, and who have a College Board-issued SSD code, do not need to reapply for accommodations under this Program. English Learner (EL) Supports like translated directions and the use of word-to-word glossaries do not require approval or special test format.

V. REQUIRED INFORMATION AND TRAINING

1. Client shall furnish College Board with: (a) a list of Participating Schools with their respective College Board school code online in College Board's SAT Suite Ordering and Registration system located at the following location ordering.collegeboard.org ("SSOR"), (b) a list of all students registered for the exam are submitted online using the registration template in the College Board registration system located at the following location ordering.collegeboard.org and (c) the Client's contacts entered online in SSOR.

Changes to Participating Schools. Changes to the list of Participating Schools must be made online in SSOR no later than **two weeks prior to the beginning of the testing window.**

If Client omits schools from the List of Participating Schools, then such schools shall not be covered under this Schedule.

2. **Training of Designated Personnel at the Participating Schools.** College Board will make available online all necessary training and/or instructional materials to Designated Personnel. The required training and/or instructional materials will be made available online by College Board to Client and **must be completed two weeks before the test administration date**.

Designated Personnel are required to utilize College Board's Test Day Toolkit ("TDTK") application in connection with the administration of the PSAT 10. Designated Personnel are required to adhere to all of College Board's procedures, policies, and protocols related to national test administrations as specified in the PSAT 10 Coordinator training and instructional materials. College Board reserves the right to cancel the administration of the Program at any Participating School where any Designated Personnel fails to complete such training prior to the scheduled test administration.

VI. TESTING

1. PSAT 10 Testing Window. Client has agreed to administer the PSAT 10 to registered students during the Testing Window(s) selected by Client in SSOR. In order to test, Client, or students, as applicable, will be required to install Bluebook on school owned devices that meet College Board technical specifications. Students using personal devices will be required to install Bluebook on compatible devices. Client shall provide internet access to each testing device.

2. Administering the PSAT 10. The PSAT 10 will be administered to students under standard College Board national test administration and security protocols as specified in the PSAT 10 testing publications and PSAT 10 Test Coordinator training and instructional materials, unless otherwise stated in this Schedule. In accordance with College Board policies, any test irregularity, including mis-administrations or security breaches, will be thoroughly investigated and may result in score cancellations. Client is responsible for making all necessary arrangements to ensure that the testing environment and the security of all test materials satisfy College Board requirements as specified in the PSAT 10 Coordinator training and instructional materials. The test will be administered by Client-employed personnel, who will not receive additional remuneration from College Board. Client personnel must use TDTK in connection with the administration of the PSAT 10. This Agreement does not guarantee that all students registered by Client for the Program will actually test. It is the responsibility of Client to encourage students to complete the program. Students will follow the guidelines in applicable College Board digital student materials.

3. Client Testing Delays. Should an event occur that would require Participating School(s) to close for reasons beyond the reasonable control of such Participating School(s) (for example, including, but not limited to, severe weather, extended power outages, or a teacher's strike) (a "Delay Event"), the Participating School(s) should adjust testing until later in the Testing Window.

Client understands that by selecting the last week of a Testing Window as their main administration date, if there is a Delay Event, there may be no additional PSAT 10 test dates. In such cases, this Agreement remains in full force and effect. No additional administration of the assessment will be made available after the Testing Window.

VII. COLLEGE BOARD COLLECTION, USE AND DISCLOSURE OF DATA.

1. Client acknowledges and agrees that the data collected from the administration of the assessment ordered under this Agreement is subject to the terms below, which are further described within College Board's privacy policies, available at https://privacy.collegeboard.org.

College Board shall collect from Client, or Participating School, as applicable, the following student data in connection with the registration of the assessments you are ordering under this Agreement, with those asterisked required for registration. Client and College Board agree to comply with the Family Educational Rights and Privacy Act, 20 U.S.C. s. 1232g, and its implementing regulations, 34 C.F.R. pt. 99 ("FERPA"), as applicable. Client will obtain any and all consents necessary for students to participate in the assessment(s), if any.

- *First and last name
- Middle initial
- *Date of Birth
- *Attending institution (AI Code)
- *Grade
- *Gender
- *Test administration indicator (that is, which assessment)
- *Season for testing
- *Student identifier

College Board may collect additional data and information from students in connection with the assessments, all of which is optional and subject to College Board's privacy policies. *See Annex 1 for more information.*

For digital testing, College Board will receive certain information about the device used by the student and monitor and capture actions students take when using Bluebook to ensure the device is compatible for test security purposes, for test validation and research, as well as to develop and improve College Board products and services. We may disclose this information but only in aggregated and de-identified form.

2.

College Board may also collect, retain, use and share students' personally identifiable information to perform this Agreement including for the purposes outlined below.

a. For SAT, State Scholarship Organizations: State affiliated scholarship organizations may receive student data, including SAT score(s), solely for the purposes of eligibility for a scholarship or recognition program. College Board will enter into an agreement with any such state agency for these purposes. College Board is not involved in setting the criteria for any state scholarship programs nor awarding decisions.

b. For SAT, State Direct Admissions Programs: State government agencies that are operating direct admissions programs on behalf of their state public higher education institutions may receive student data, including SAT score(s), solely for the purposes of facilitating and administering direct admissions on behalf of those institutions. College Board will enter into an agreement with any such state agency for these purposes. College Board is not involved in setting the criteria for any direct admission programs or offers, nor is College Board involved in any decision by the state agency or the state public higher education institution(s) to make (or decline to make) any direct admission offers. *See Annex 1.*
c. For SAT, National Presidential Scholars: Data about eligible students are shared with the US Department of Education for purposes of the U.S. Presidential Scholars Programs. College Board will enter into an agreement with the US Department of Education for these purposes.
d. For PSAT 10 and PSAT/NMSQT, National Recognition Programs: College Board uses student data to determine a student's eligibility to apply for and to receive its National Recognition Programs, award(s), for administration of the National Recognition Program, and share information with the student and their high school and district about the students' eligibility and recognition status.
e. For PSAT/NMSQT, College Board will share scores, data derived from scores, certain student demographic information, and other information provided by students during testing with the National Merit Scholarship Corporation (NMSC) in order for NMSC to determine whether students are eligible for its National Merit Scholarship Program and administer this program in accordance with the PSAT/NMSQT Student Guide and www.nationalmerit.org. This includes NMSC sharing information with the students and their high school about the students' eligibility and recognition status.
f. Score Reporting to Students: College Board will report to the student the score achieved on assessments which are the subject matter of this Agreement, insights from those scores, and their AP Potential.
g. SAT Score Sends: Students may identify institutions to receive their SAT scores. Student scores and basic demographic information sufficient for identity matching are only provided to higher education institutions and scholarship organizations when authorized by students.
h. Score Report to Schools, Districts and State: Schools, Districts and the State will have access, including through College Board's online reporting portals, to students' assessments score(s) and data derived from the score(s) the student received on past and future College Board assessments, consistent with disclosures to the students.
i. Accommodations: College Board uses student data to process applications for testing accommodations and to communicate with the SSD coordinator and students regarding accommodations.
j. Test Security: College Board may use student data to identify and investigate potential test security incidents, communicate with students about any such incidents, and protect and enhance test security. College Board may disclose the results of test security investigations with third parties, including to the student's school, any score recipient, college, higher education institution or agency, scholarship organization, potential score recipient government agency in the U.S or abroad, parents, legal guardians, or law enforcement.
k. Research: College Board may use de-identified student data for psychometric and educational research purposes to evaluate the validity of our assessments and ensure that tests are unbiased in terms of race, gender, and culture. College Board may use de-identified data to demonstrate the effectiveness of College Board programs and services. College Board may also use data to maintain, develop, support, improve and diagnose our services and applications.

l. Operational Third Parties: College Board may use and disclose personally identifiable information to third parties providing services to College Board as necessary for its performance of the services in this Agreement and others necessary to administer the SAT Suite and related services. These vendors cannot relicense, sell, rent, or otherwise repurpose the information. These organizations have contractual requirements to protect personally identifiable information from unauthorized access, use, or disclosure.
m. Other: College Board may disclose student data as required by law, when we believe in good faith that it's necessary to protect our rights, protect an individual's safety or the safety of others, investigate fraud, or respond to a government request.

College Board may retain information as needed for legitimate educational purposes, to provide services to students or their educational institution, comply with legal obligations, resolve disputes, and enforce College Board's agreements, which survive this Agreement.

Client acknowledges that students may desire to continue and further develop a direct relationship beyond the administration of SAT Suite of Assessments for the purposes of students' college and career readiness by utilizing College Board's services available to all students. The terms and conditions of this Agreement related to the collection, maintenance, use, and disclosure of data shall only apply to the data College Board receives in connection with this Agreement. Nothing in this Agreement, or any data privacy agreement, is intended to diminish or interfere with student's personal rights in their assessment data, as students have rights independent of this Agreement to access, retain, and use their test scores, including for tests which are the subject matter of this Agreement, and no provisions in this Agreement are intended to address or cover data that College Board has, or may receive, for services which are outside the scope of this Agreement.

VIII. DATA PROTECTION AND SECURITY MEASURES

1. Data Protection. College Board shall take actions to protect the security and confidentiality of personally identifiable information that may be obtained pursuant to this Agreement in a manner consistent with industry standards. College Board will maintain a SOC 2 Type II report.

College Board has security measures in place designed to help protect against loss, misuse and alteration of the data under College Board's control. College Board shall develop, implement, maintain and use reasonably appropriate administrative, technical and physical security measures to preserve the confidentiality, integrity and availability of personally identifiable information that may be obtained pursuant to this Agreement, as determined by College Board. College Board shall host content in a secure environment that uses Web Application Firewalls/security groups and other advanced technologies designed to prevent interference or access from outside intruders.

College Board encrypts personally identifiable information that may be obtained pursuant to this Agreement in transmission and storage where technically feasible and when designed as being appropriate by College Board. If not, other security controls may be implemented to reduce risk, mitigate risk, or otherwise protect the data as determined solely by College Board. When College Board's platforms are accessed using a supported web browser, Transport Layer Securit ("TLS") or equivalent technology protects information while in transit, using both server authentication and data encryption to help secure the data and limit availability to only authorized users.

Client shall be responsible for removing access to College Board's platforms for any personnel who no longer should have access, or promptly notifying College Board to request removal of any such access.

2. Security Measures. College Board will extend the confidentiality requirements and security measures identified in this Agreement by contract to subcontractors used by College Board, if any, to provide services related to this Agreement. College Board will use appropriate and reliable storage media, regularly backup data and retain such backup copies for the duration of this Agreement, as defined by College Board. You acknowledge that College Board utilizes cloud hosting service providers throughout its infrastructure. College Board will store personally identifiable information that may be obtained pursuant to this Agreement in the United States where technically feasible and reasonable, as determined solely by College Board.

IX. COLLEGE BOARD CUSTOMER SERVICE

1. Dedicated PSAT 10 Customer Service for Educators: College Board will provide Client with telephone customer service support for educators. Specifically, College Board will provide:

a. Step-by-step assistance with College Board online tools including the SSD System, SSOR and Test Day Toolkit (TDTK);
b. Assistance with completing required forms such as School Code Request Form;
c. Assistance with technical complications for Bluebook Installation and Registration login, for example; and
d. Feedback mechanism for counselors.

Dates and Times of Service: **Available three months prior to primary test date**. Standard hours of operation: Monday through Friday 9:00 a.m. to 6:00 p.m. Eastern Standard Time. Customer service for the PSAT 10 Program can also be accessed online at the following web address: https://satsuite.collegeboard.org/contact-us.

X. ADDITIONAL PSAT 10 TERMS AND CONDITIONS

1. Ownership of Intellectual Property. College Board is the exclusive owner of all rights in and to the digital Testing Platform, Bluebook, Test Day Toolkit (TDTK), K-12 Reporting Portal, AP Potential, guidebooks for students and Designated Personnel, SAT exam, SAT with Essay exam, PSAT/NMSQT, PSAT 10, and PSAT 8/9 examinations, all individual test items (questions) contained therein, including all copies thereof, test booklets, all examination materials and all data collected therefrom, including but not limited to student scores derived from the exam, are at all times exclusively owned by College Board. In addition, College Board is the exclusive owner of AP Potential, College Board's mobile app described below, and all publications and reports associated with SAT exam, SAT with Essay exam, PSAT/NMSQT, PSAT 10 and PSAT 8/9 described in this Agreement including all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights, and all renewals and extensions thereof (all platforms, exams and related material referenced in this provision are collectively referred to as "College Board Intellectual Property"). Client acknowledges and agrees that nothing in this Agreement shall be interpreted to indicate that College Board is passing its proprietary rights in and to College Board Intellectual Property to Client.

Except as expressly provided herein, Client is prohibited from copying, disseminating, publishing, displaying or distributing in any form, or reproducing any questions from the assessments including from digital testing or paper test booklets (if used) in whole or in part, without the prior written consent of College Board.

2. **Student Score Report License**. College Board hereby grants Client a limited, nonexclusive, nontransferable, non-assignable right to access and use the student score reports provided for the assessment(s) pursuant to this Agreement for the legitimate educational purposes of internal analysis, which includes your internal training sessions, as long as the data used during training preserves the confidentiality of students. Client may not use or distribute the score reports or the data derived from them externally or to third parties other than the student without the express written consent of College Board.

XI. FEE CALCULATION

1. Fees. The fee calculation for this Schedule is based on the Client selections in SSOR. Pricing adjustments that reduce the fee per test for an amount less than the retail price are provided at the sole discretion of College Board.

Clients will be charged the fee in the attached Budget Schedule based on the number of PSAT 10 tests submitted. The test volumes and total cost indicated in the Budget Schedule are estimates.

College Board reserves the right to suspend ordering for the SAT Suite of Assessments if Client has an outstanding undisputed invoice(s) to College Board in an amount greater than $300 for more than 90 days from the invoice date. Clients who have been suspended will be precluded from ordering any SAT Suite of Assessments in College Board's online ordering system until the invoice(s) has been paid in full. Access will not be denied if there is a third party (your District or State or another school) responsible for the payment of such outstanding invoices.

2. Restrictions. No student participating under this Schedule will be assessed an individual fee for taking the PSAT 10 exam.

XII. CLIENT CONTACT INFORMATION

	Primary[1]	Procurement[2]
Name:		
Title:		
Address:		
City/State/Zip:		
Phone:		
Fax:		
Email:		

[1] This is the person to whom College Board should direct primary communications.

[2] This is the person to whom College Board should send the contract for review and approval within the district procurement/contract department.

PSAT/NMSQT®
SHELF SCHEDULE

I. BACKGROUND

College Board owns and delivers its national standardized tests to students. Taking the PSAT/NMSQT®[1] provides students with the opportunity to receive national recognition and scholarships through National Merit Scholarship Corporation. This Schedule outlines how a Client sponsors the PSAT/NMSQT administration at its schools ("Participating Schools") for students and what data and reports may be provided to Client through our online data portal (the "Program").

II. PROGRAM MATERIALS AND INFORMATION

College Board shall furnish PSAT/NMSQT materials and information as follows:

1. **Materials for Students:**
    a. Link to the Student Guide.
    b. PSAT/NMSQT test materials delivered via College Board's Digital Testing Platform, BlueBook™. Assessment score report delivered as a PDF to Client via College Board's K-12 Reporting Portal.
    c. Information about scholarship and recognition programs, offered by each of National Merit Scholarship Corporation and College Board, as applicable.
    d. Information from College Board to help participants understand and navigate post-secondary and career pathways and opportunities through a College Board mobile application, as described in Annex 1 attached.
    e. Access to SAT Practice Tools and Support as set forth below.
    f. Access to Bluebook and the test at school (Client will have access to a digital test preview to demonstrate the navigation and tools available to participants in Bluebook).

2. **Materials for Participating Schools**:
    a. Materials to support test administration.
    b. Client will receive online access to Test Day Toolkit (TDTK), College Board's digital test administration tool, and a downloadable PDF of PSAT/NMSQT testing publications.
    c. Access to a digital test preview to demonstrate the navigation and tools available to participants in the digital testing platform.
    d. Materials to support participants receiving accommodations which require a paper test, including applicable instructions and the paper testing materials.
    e. Access to individual participant score reports and aggregate score reports, and downloadable student data file delivered via College Board's K-12 Reporting Portal.
    f. Access to AP Potential™ via College Board website.
    g. Insights and reporting on participants' participation in the College Board mobile application and insights to support participant engagement in exploring college and career information and opportunities, as further described in Annex1.

3. **Reports for District:**

[1] PSAT/NMSQT is a registered trademark of College Board and National Merit Scholarship Corporation.

a. Access to individual student score reports and aggregate score reports, and downloadable student data file, delivered via College Board's K-12 Reporting Portal.
b. Access to AP Potential via College Board website.

4. Delivering SAT Practice Tools and Support. In addition to the free practice tools available at http://sat.collegeboard.org/practice, all students will have access to a) full-length practice tests in Bluebook and b) focused practice resources through College Board's collaboration with Khan Academy. Practice materials for the SAT exam are available at the Khan Academy website at https://www.khanacademy.org/digital-sat). Client and students shall use the Khan Academy Prep tool and materials in accordance with Khan Academy's guidelines.

III. CLIENT RESPONSIBILITIES

1. In connection with PSAT/NMSQT, Client agrees that it will, or will ensure each Participating School will:

a. Comply with the Legal Terms for Educators and Institutions at https://privacy.collegeboard.org/educator-legal-terms?navId=gf-edterms.
b. Review the information in Annex 1 below and incorporated herein about College Board's mobile application available for students.
c. Place orders by the ordering deadline. Orders cannot be decreased after the ordering deadline for PSAT/NMSQT.
d. Designate personnel to act as a Test Coordinator, SSD Coordinator, Technology Coordinator, Technology Monitor, Proctors and Room or Hall Monitors (collectively, "Designated Personnel").
e. Ensure compliance with the requirements for training and other guidelines in publications shared with you.
f. Verify and update, if necessary, the Test Coordinator name and contact information.
g. Submit Eligibility Forms for students with disabilities who do not already have a College Board SSD Eligibility Code (see calendar for deadlines).
h. Ensure that registered students are provided a link to the online PSAT/NMSQT Student Guide (https://satsuite.collegeboard.org/media/pdf/psat-nmsqt-student-guide.pdf) **at least two weeks before the anticipated start of testing.**
i. Administer the test to students under standard College Board national test administration and security policies, procedures and protocols as specified in training and/or instructional material shared with Client and in compliance with Designated Personnel Guide directions.
j. Administer the test only during the authorized Testing Window for which the school is registered.
k. Receive emails from College Board regarding the tests and their related offerings and share emails and coordinate communications with other staff at your schools as necessary.
l. There is always a risk of disruption during testing, including, without limitation, computer issues. College Board has endeavored to put in place procedures to allow administrators and students to recover from such disruption and complete testing. Despite such efforts, Client understands that there are situations where the only option is to complete testing on the other days during the testing window. This is Client's sole remedy in relation to such disruption.
    1. Testing may not be available in the case of severe weather or other disruptions, including without limitation epidemics, that require lengthy closures at your school that extend beyond the end of the Testing Window.

IV. DIGITAL AND PAPER TESTING REQUIREMENTS; ACCOMMODATIONS

1. **Digital Testing Requirements**
   a. The Test Coordinator will ensure compliance with training requirements for all testing staff at each Participating School who will complete all required College Board Test Day Staff Training and provide training access to other supporting staff. Client will ensure compliance with training requirements for all testing staff.
   b. The Technology Coordinator for each Participating School will ensure the successful and accurate completion of all digital readiness and technology setup activities. These include: a dedicated device for Test Coordinator(s) to monitor test activities, a proctor device to administer the digital test in each testing room, and devices for each test-taking student with College Board's Digital Testing Platform, Bluebook™, installed. Additional information on the devices required for test day, including recommendations on battery and power source, supported operating systems, supported web browsers, and network configuration can be found at https://bluebook.collegeboard.org/technology/devices. Client must ensure that each Participating School can meet College Board Digital Testing Requirements as outlined on the referenced website.
   c. Client shall complete College Board's Registration process for each student scheduled to test by the registration deadline.
   d. If you are administering the test with accommodations requiring the use of an approved assistive technology device, students should pre-test the device in the Student Digital Test Preview prior to test day to ensure operational functionality. If the digital accommodation supports within the Digital Test preview do not meet students' testing needs, Client should arrange for alternate accommodation supports.

2. **Paper Tests**

   a. College Board may provide a limited number of paper test books for students requiring accommodations that cannot be delivered as a digital test or otherwise as approved by College Board.
   b. Client, or Participating Schools, as applicable, will keep all test books in locked storage until test date.
   c. Participating Schools will collect all test books at the end of the test.
   d. Participating Schools will promptly complete the process for submitting responses for students that test using paper materials in accordance with the policies and processes provided by College Board to Test or SSD Coordinators.
   e. Participating Schools will promptly return all paper test materials in accordance with the policies and processes provided by College Board to Test Coordinators.

3. ACCOMMODATIONS

Accommodations for students with disabilities will be granted and administered according to College Board's standard eligibility and administration procedures. Students must apply for accommodations under College Board's Services for Students with Disabilities (SSD) program and must follow the SSD program's published procedures, which can be found at https://accommodations.collegeboard.org/. Only College Board-approved accommodations are permitted. Students who use accommodated test materials without the College Board's prior approval may not receive scores or may otherwise have their scores cancelled or invalidated, and that cannot be reported to colleges, scholarship programs and other designated score recipients. Client will be responsible for ensuring that an appropriate accommodations coordinator ('SSD Coordinator') is designated for each Participating School to facilitate the application for and administration

of approved accommodations. SSD Coordinators are responsible for notifying students when and where to report on test day. Early testing or testing at times other than those published by College Board is not permitted under any circumstances. The 'SSD Coordinator Form' (used to establish an SSD Coordinator) is available at SSD Coordinator Form. Students with accommodations previously approved by College Board, and who have a College Board-issued SSD code, do not need to reapply for accommodations under this Program.

V. REQUIRED INFORMATION AND TRAINING

1. Client shall furnish College Board with: (a) a list of Participating Schools with their respective College Board school code online in College Board's SAT Suite Ordering and Registration system located at the following location ordering.collegeboard.org ("SSOR"), (b) a list of all students registered for the exam are submitted online using the registration template in the College Board registration system located at the following location ordering.collegeboard.org and (c) the Client's contacts entered online in SSOR.

Changes to Participating Schools. Changes to the list of Participating Schools must be made online in the SSOR no later than **two weeks prior to the beginning of the testing window.**

If Client omits schools from the List of Participating Schools, then such schools shall not be covered under this Schedule.

2. **Training of Designated Personnel at the Participating Schools.** College Board will make available online all necessary training and/or instructional materials to Designated Personnel. The required training and/or instructional materials will be made available online by College Board to Client and **must be completed two weeks before the test administration date**.

Designated Personnel are required to utilize College Board's Test Day Toolkit ("TDTK") application in connection with the administration of the PSAT/NMSQT. Designated Personnel are required to adhere to all of College Board's procedures, policies, and protocols related to national test administrations as specified in the PSAT/NMSQT Coordinator training and instructional materials. College Board reserves the right to cancel the administration of the Program at any Participating School where any Designated Personnel fails to complete such training prior to the scheduled test administration.

VI. TESTING

1. **PSAT/NMSQT Testing Window.** Client has agreed to administer the PSAT/NMSQT to registered students during the Testing Window(s) selected by Client in SSOR. In order to test, Client, or students, as applicable, will be required to install Bluebook on school owned devices that meet College Board technical specifications. Students using personal devices will be required to install Bluebook on compatible devices. Client shall provide internet access to each testing device.

2. **Administering the PSAT/NMSQT.** The PSAT/NMSQT will be administered to students under standard College Board national test administration and security protocols as specified in the PSAT/NMSQT testing publications and PSAT/NMSQT Test Coordinator training and instructional materials, unless otherwise stated in this Schedule. In accordance with College Board policies, any test irregularity, including mis-administrations or security breaches, will be thoroughly investigated and may result in score cancellations. Client is responsible for making all necessary arrangements to ensure that the testing environment and the security of all test materials satisfy College Board requirements as specified in the PSAT/NMSQT Coordinator training and instructional materials. The test will be administered by Client-employed personnel, who will not receive additional remuneration from College Board. Client personnel must use TDTK in connection with the administration of the PSAT/NMSQT. This Agreement

does not guarantee that all Students registered by Client for the Program will actually test. It is the responsibility of Client to encourage students to complete the program. Students will follow the guidelines in applicable College Board digital student materials.

3. Client Testing Delays. Should an event occur that would require Participating School(s) to close for reasons beyond the reasonable control of such Participating School(s) (for example, including, but not limited to, severe weather, extended power outages, or a teacher's strike) (a "Delay Event"), the Participating School(s) should adjust testing later in their Testing Window. No additional administration of the assessment will be made available after the Testing Window.

VII. COLLEGE BOARD COLLECTION. USE AND DISCLOSURE OF DATA

1. Client acknowledges and agrees that the data collected from the administration of the assessment ordered under this Agreement is subject to the terms below, which are further described within College Board's privacy policies, available at https://privacy.collegeboard.org.

College Board shall collect from Client, or Participating School, as applicable, the following student data in connection with the registration of the assessments you are ordering under this Agreement, with those asterisked required for registration. Client and College Board agree to comply with the Family Educational Rights and Privacy Act, 20 U.S.C. s. 1232g, and its implementing regulations, 34 C.F.R. pt. 99 ("FERPA"), as applicable. Client will obtain any and all consents necessary for students to participate in the assessment(s), if any.

- *First and last name
- Middle initial
- *Date of Birth
- *Attending institution (AI Code)
- *Grade
- *Gender
- *Test administration indicator (that is, which assessment)
- *Season for testing
- *Student identifier

College Board may collect additional data and information from students in connection with the assessments, all of which is optional and subject to College Board's privacy policies. *See Annex 1 for more information.*

For digital testing, College Board will receive certain information about the device used by the student and monitor and capture actions students take when using Bluebook to ensure the device is compatible for test security purposes, for test validation and research, as well as to develop and improve College Board products and services. We may disclose this information but only in aggregated and de-identified form.

2. College Board may also collect, retain, use and share students' personally identifiable information to perform this Agreement including for the purposes outlined below.

a. For SAT, State Scholarship Organizations: State affiliated scholarship organizations may receive student data, including SAT score(s), solely for the purposes of eligibility for a scholarship or recognition program. College Board will enter into an agreement with any such state agency for

these purposes. College Board is not involved in setting the criteria for any state scholarship programs nor awarding decisions.

b. For SAT, State Direct Admissions Programs: State government agencies that are operating direct admissions programs on behalf of their state public higher education institutions may receive student data, including SAT score(s), solely for the purposes of facilitating and administering direct admissions on behalf of those institutions. College Board will enter into an agreement with any such state agency for these purposes. College Board is not involved in setting the criteria for any direct admission programs or offers, nor is College Board involved in any decision by the state agency or the state public higher education institution(s) to make (or decline to make) any direct admission offers. *See Annex 1.*
c. For SAT, National Presidential Scholars: Data about eligible students are shared with the US Department of Education for purposes of the U.S. Presidential Scholars Programs. College Board will enter into an agreement with the US Department of Education for these purposes.
d. For PSAT 10 and PSAT/NMSQT, National Recognition Programs: College Board uses student data to determine a student's eligibility to apply for and receive its National Recognition Programs, award(s), for administration of the National Recognition Program and share information with the student, their high school and district about the students' eligibility and recognition status.
e. For PSAT/NMSQT, College Board will share scores, data derived from scores, certain student demographic information, and other information provided by students during testing with the National Merit Scholarship Corporation (NMSC) in order for NMSC to determine whether students are eligible for its National Merit Scholarship Program and administer this program in accordance with the PSAT/NMSQT Student Guide and www.nationalmerit.org. This includes NMSC sharing information with the student and their high school about the students' eligibility and recognition status.
f. Score Reporting to Students: College Board will report to the student the score achieved on the tests which are the subject matter of this Agreement, insights from those scores, and their AP Potential.
g. SAT Score Sends: Students may identify institutions to receive their SAT scores. Student scores and basic demographic information sufficient for identity matching are only provided to higher education institutions and scholarship organizations when authorized by students.
h. Score Report to Schools, Districts and State: Schools, Districts and the State will have access, including through College Board's online reporting portals, to students' assessments score(s) and data derived from the score(s) the student received on past and future College Board assessments, consistent with disclosures to the students.
i. Accommodations: College Board uses student data to process applications for testing accommodations and to communicate with the SSD coordinator and students regarding accommodations.
j. Test Security: College Board may use student data to identify and investigate potential test security incidents, communicate with students about any such incidents, and protect and enhance test security. College Board may disclose the results of test security investigations with third parties, including to the student's school, any score recipient, college, higher education institution or agency, scholarship organization, potential score recipient government agency in the U.S or abroad, parents, legal guardians, or law enforcement.
k. Research: College Board may use de-identified student data for psychometric and educational research purposes to evaluate the validity of our assessments and ensure that tests are unbiased in terms of race, gender, and culture. College Board may use de-identified data to demonstrate the

effectiveness of College Board programs and services. College Board may also use data to maintain, develop, support, improve and diagnose our services and applications.

l. Operational Third Parties: College Board may use and disclose personally identifiable information to third parties providing services to College Board as necessary for its performance of the services in this Agreement and others necessary to administer the SAT Suite and related services. These vendors cannot relicense, sell, rent, or otherwise repurpose the information. These organizations have contractual requirements to protect personally identifiable information from unauthorized access, use, or disclosure.

m. Other: College Board may disclose student data as required by law, when we believe in good faith that it's necessary to protect our rights, protect an individual's safety or the safety of others, investigate fraud, or respond to a government request.

College Board may retain information as needed for legitimate educational purposes, to provide services to students or their educational institution, comply with legal obligations, resolve disputes, and enforce College Board's agreements, which survive this Agreement.

Client acknowledges that students may desire to continue and further develop a direct relationship beyond the administration of SAT Suite of Assessments for the purposes of students' college and career readiness by utilizing College Board's services available to all students. The terms and conditions of this Agreement related to the collection, maintenance, use, and disclosure of data shall only apply to the data College Board receives in connection with this Agreement. Nothing in this Agreement, or any data privacy agreement, is intended to diminish or interfere with student's personal rights in their assessment data, as students have rights independent of this Agreement to access, retain, and use their test scores, including for tests which are the subject matter of this Agreement, and no provisions in this Agreement are intended to address or cover data that College Board has, or may receive, for services which are outside the scope of this Agreement.

VIII. DATA PROTECTION AND SECURITY MEASURES

1. Data Protection. College Board shall take actions to protect the security and confidentiality of personally identifiable information that may be obtained pursuant to this Agreement in a manner consistent with industry standards. College Board will maintain a SOC 2 Type II report.

College Board has security measures in place designed to help protect against loss, misuse and alteration of the data under College Board's control. College Board shall develop, implement, maintain and use reasonably appropriate administrative, technical and physical security measures to preserve the confidentiality, integrity and availability of personally identifiable information that may be obtained pursuant to this Agreement, as determined by College Board. College Board shall host content in a secure environment that uses Web Application Firewalls/security groups and other advanced technologies designed to prevent interference or access from outside intruders.

College Board encrypts personally identifiable information that may be obtained pursuant to this Agreement in transmission and storage where technically feasible and when designed as being appropriate by College Board. If not, other security controls may be implemented to reduce risk, mitigate risk, or otherwise protect the data as determined solely by College Board. When College Board's platforms are accessed using a supported web browser, Transport Layer Security ("TLS") or equivalent technology protects information while in transit, using both server authentication and data encryption to help secure the data and limit availability to only authorized users.

Client shall be responsible for removing access to College Board's platforms for any personnel who no longer should have access, or promptly notifying College Board to request removal of any such access.

2. Security Measures. College Board will extend the confidentiality requirements and security measures identified in this Agreement by contract to subcontractors used by College Board, if any, to provide services related to this Agreement. College Board will use appropriate and reliable storage media, regularly backup data and retain such backup copies for the duration of this Agreement, as defined by College Board. You acknowledge that College Board utilizes cloud hosting service providers throughout its infrastructure. College Board will store personally identifiable information that may be obtained pursuant to this Agreement in the United States where technically feasible and reasonable, as determined solely by College Board.

IX. COLLEGE BOARD CUSTOMER SERVICE

1. Dedicated PSAT/NMSQT Customer Service for Educators: College Board will provide Client with telephone customer service support for educators. Specifically, College Board will provide:

a. Step-by-step assistance with College Board online tools including SSD System, SSOR and Test Day Toolkit (TDTK);
b. Assistance with completing required forms such as School Code Request Form;
c. Assistance with technical complications for Bluebook Installation and Registration login, for example; and
d. Feedback mechanism for counselors.

Dates and Times of Service: **Available three months prior to primary test date**. Standard hours of operation: Monday through Friday 9:00 a.m. to 6:00 p.m. Eastern Standard Time. Customer service for the PSAT/NMSQT Program can also be accessed online at the following web address: https://satsuite.collegeboard.org/contact-us .

X. ADDITIONAL PSAT/NMSQT TERMS AND CONDITIONS

1. Ownership of Intellectual Property. College Board is the exclusive owner of all rights in and to the digital Testing Platform, Bluebook, Test Day Toolkit (TDTK), K-12 Reporting Portal, AP Potential, guidebooks for students and Designated Personnel, SAT exam, SAT with Essay exam, PSAT/NMSQT, PSAT 10, and PSAT 8/9 examinations, all individual test items (questions) contained therein, including all copies thereof, test booklets, all examination materials and all data collected therefrom, including but not limited to student scores derived from the exam, are at all times exclusively owned by College Board. In addition, College Board is the exclusive owner of AP Potential, College Board's mobile app described below, and all publications and reports associated with SAT exam, SAT with Essay exam, PSAT/NMSQT, PSAT 10 and PSAT 8/9 described in this Agreement including all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights, and all renewals and extensions thereof (all platforms, exams and related material referenced in this provision are collectively referred to as "College Board Intellectual Property"). Client acknowledges and agrees that nothing in this Agreement shall be interpreted to indicate that College Board is passing its proprietary rights in and to College Board Intellectual Property to Client.

Except as expressly provided herein, Client is prohibited from copying, disseminating, publishing, displaying or distributing in any form, or reproducing any questions from the assessments including from digital testing or paper test booklets (if used) in whole or in part, without the prior written consent of College Board.

2. **Student Score Report License**. College Board hereby grants Client a limited, nonexclusive, nontransferable, non-assignable right to access and use the student score reports provided for the assessment(s) pursuant to this Agreement for the legitimate educational purposes of internal analysis, which includes your internal training sessions, as long as the data used during training preserves the confidentiality of students. Client may not use or distribute the score reports or the data derived from them externally or to third parties other than the student without the express written consent of College Board.

XI. FEE CALCULATION

1. Fees. The fee calculation for this Schedule is based on the Client selections in SSOR. Pricing adjustments that reduce the fee per test for an amount less than the retail price are provided at the sole discretion of College Board.

Clients will be charged the fee in the attached Budget Schedule based on the number of PSAT/NMSQT tests submitted. The test volumes and total cost indicated in the Budget Schedule are estimates.

College Board reserves the right to suspend ordering for the SAT Suite of Assessments if Client has an outstanding undisputed invoice(s) to College Board in an amount greater than $300 for more than 90 days from the invoice date. Clients who have been suspended will be precluded from ordering any SAT Suite of Assessments in College Board's online ordering system until the invoice(s) has been paid in full. Access will not be denied if there is a third party (your District or State or another school) responsible for the payment of such outstanding invoices.

2. Restrictions. No student participating under this Schedule will be assessed an individual fee for taking the PSAT/NMSQT exam.

XII. CLIENT CONTACT INFORMATION

	Primary[2]	Procurement[3]
Name:		
Title:		
Address:		
City/State/Zip:		
Phone:		
Fax:		
Email:		

[2] This is the person to whom College Board should direct primary communications.

[3] This is the person to whom College Board should send the contract for review and approval within the district procurement/contract department.

PSAT™ 8/9
SHELF SCHEDULE

I. BACKGROUND

College Board owns and delivers its national standardized tests to students. This Schedule outlines how a Client sponsors a PSAT™ 8/9 administration at its schools ("Participating Schools") for students and what data and reports may be provided to Client through our online data portal (the "Program").

II. PROGRAM MATERIALS AND INFORMATION

College Board shall furnish PSAT 8/9 materials and information as follows:

1. **Materials for Students:**
   a. Link to the Student Guide.
   b. PSAT 8/9 test materials delivered via College Board's Digital Testing Platform, BlueBook™, Assessment score report delivered as a PDF to Client via College Board's K-12 Reporting Portal.
   c. Information about recognition programs College Board.
   d. Access to SAT Practice Tools and Support as set forth below.
   e. Access to Bluebook and the test at school (Client will have access to a digital test preview to demonstrate the navigation and tools available to students in Bluebook).

2. **Materials for Participating Schools**:
   a. Materials to support test administration.
   b. Client will receive online access to test day toolkit (TDTK), College Board's digital test administration tool, and a downloadable PDF of the PSAT 8/9 testing publications.
   c. Access to a digital test preview to demonstrate the navigation and tools available to students in the digital testing platform.
   d. Materials to support students receiving accommodations which require a paper test, including applicable instructions and the paper testing materials.
   e. Access to individual student score reports and aggregate score reports, and downloadable student data file delivered via College Board's K-12 Reporting Portal.
   f. Access to AP Potential™ via College Board website.

3. **Reports for District:**
   a. Access to individual student score reports and aggregate score reports, and downloadable student data file, delivered via College Board's K-12 Reporting Portal
   b. Access to AP Potential via College Board website.

4. **Delivering SAT Practice Tools and Support.** In addition to the free practice tools available at http://sat.collegeboard.org/practice, all students will have access to a) full-length practice tests in Bluebook and b) focused practice resources through College Board's collaboration with Khan Academy. Practice materials for the SAT exam are available at the Khan Academy website at https://www.khanacademy.org/digital-sat. Client and students shall use the Khan Academy practice tool and materials in accordance with Khan Academy's guidelines.

III. CLIENT RESPONSIBILITIES

1. In connection with PSAT 8/9, Client agrees that it will, or will ensure each Participating School will:

a. Comply with the Legal Terms for Educators and Institutions at https://privacy.collegeboard.org/educator-legal-terms?navId=gf-edterms.
b. Review the information in Annex 1 below and incorporated herein about College Board's mobile application available for students.
c. Place orders by the ordering deadline. Orders cannot be decreased after the ordering deadline for PSAT 8/9.
d. Designate personnel to act as a Test Coordinator, SSD Coordinator, Technology Coordinator, Technology Monitor, Proctors and Room or Hall Monitors (collectively, "Designated Personnel").
e. Ensure compliance with the requirements for training and other guidelines in publications shared with you.
f. Verify and update, if necessary, the Test Coordinator name and contact information.
g. Submit Eligibility Forms for students with disabilities who do not already have a College Board SSD Eligibility Code (see calendar for deadlines).
h. Ensure that registered students are provided a link to the online PSAT 8/9 Student Guide (https://satsuite.collegeboard.org/media/pdf/psat-8-9-student-guide.pdf) **at least two weeks before the anticipated start of testing.**
i. Administer the test to students under standard College Board national test administration and security policies, procedures and protocols as specified in training and/or instructional material shared with Client and in compliance with Designated Personnel Guide directions.
j. Administer the test only during the authorized Testing Window for which the school is registered.
k. Receive emails from College Board regarding the tests and their related offerings and share emails and coordinate communications with other staff at your schools as necessary.
l. There is always a risk of disruption during testing, including, without limitation, computer issues. College Board has endeavored to put in place procedures to allow administrators and students to recover from such disruption and complete testing. Despite such efforts, Client understands that there are situations where the only option is to complete testing on the other days during the testing window. This is Client's sole remedy in relation to such disruption.
    1. Testing may not be available in the case of severe weather or other disruptions, including without limitation epidemics, that require lengthy closures at your school that extend beyond the end of the Testing Window.

IV. DIGITAL AND PAPER TESTING REQUIREMENTS; ACCOMMODATIONS

1. Digital Testing Requirements

a. The Test Coordinator will ensure compliance with training requirements for all testing staff at each Participating School who will complete all required College Board Test Day Staff Training and provide training access to other supporting staff. Client will ensure compliance with training requirements for all testing staff.
b. The Technology Coordinator for each Participating School will ensure the successful and accurate completion of all digital readiness and technology setup activities. These include: a dedicated device for Test Coordinator(s) to monitor test activities, a proctor device to administer the digital test in each testing room, and devices for each test-taking student with College Board's Digital Testing Platform, Bluebook™, installed. Additional information on the devices required for test day, including recommendations on battery and power source, supported operating systems,

supported web browsers, and network configuration can be found at https://bluebook.collegeboard.org/technology/devices. Client must ensure that each Participating School can meet College Board Digital Testing Requirements as outlined on the referenced website.

c. Client shall complete College Board's Registration process for each student scheduled to test by the registration deadline.
d. If you are administering the test with accommodations requiring the use of an approved assistive technology device, students should pre-test the device in the Student Digital Test Preview prior to test day to ensure operational functionality. If the digital accommodation supports within the Digital Test preview do not meet students' testing needs, Client should arrange for alternate accommodation supports.

2. Paper Tests

a. College Board may provide a limited number of paper test books for students requiring accommodations that cannot be delivered as a digital test or otherwise as approved by College Board.
b. Client, or Participating Schools, as applicable, will keep all test books in locked storage until test date.
c. Participating Schools will collect all test books at the end of the test.
d. Participating Schools will promptly complete the process for submitting responses for students that test using paper materials in accordance with the policies and processes provided by College Board to Test or SSD Coordinators.
e. Participating Schools will promptly return all paper test materials in accordance with the policies and processes provided by College Board to Test Coordinators.

3. ACCOMMODATIONS

Client will be responsible for ensuring that an appropriate accommodations coordinator ('SSD Coordinator') is designated for each Participating School to facilitate the application for and administration of approved accommodations. SSD Coordinators are responsible for notifying students when and where to report on test day. Early testing or testing at times other than those published by College Board is not permitted under any circumstances. The 'SSD Coordinator Form' (used to establish an SSD Coordinator) is available at SSD Coordinator Form. English Learner (EL) Supports like translated directions and the use of word-to-word glossaries do not require approval or special test format.

V. REQUIRED INFORMATION AND TRAINING

1. Client shall furnish College Board with: (a) a list of Participating Schools with their respective College Board school code online in College Board's SAT Suite Ordering and Registration system located at the following location ordering.collegeboard.org ("SSOR"), (b) a list of all students registered for the exam are submitted online using the registration template in the College Board registration system located at the following location ordering.collegeboard.org and (c) the Client's contacts entered online in SSOR.

Changes to Participating Schools. Changes to the list of Participating Schools must be made online in the SSOR no later than **two weeks prior to the beginning of the testing window.**

If Client omits schools from the List of Participating Schools, then such schools shall not be covered under this Schedule.

2. **Training of Designated Personnel at the Participating Schools.** College Board will make available online all necessary training and/or instructional materials to Designated Personnel. The required training and/or instructional materials will be made available online by College Board to Client and **must be completed two weeks before the test administration date**.

Designated Personnel are required to utilize College Board's Test Day Toolkit ("TDTK") application in connection with the administration of the PSAT 8/9. Designated Personnel are required to adhere to all of College Board's procedures, policies, and protocols related to national test administrations as specified in the PSAT 8/9 Coordinator training and instructional materials. College Board reserves the right to cancel the administration of the Program at any Participating School where any Designated Personnel fails to complete such training prior to the scheduled test administration.

VI. TESTING

1. PSAT 8/9 Testing Window. Client has agreed to administer the PSAT 8/9 to registered students during the Testing Window(s) selected by Client in SSOR. In order to test, Client, or students, as applicable, will be required to install Bluebook on school owned devices that meet College Board technical specifications. Students using personal devices will be required to install Bluebook on compatible devices. Client shall provide internet access to each testing device.

2. Administering the PSAT 8/9. The PSAT 8/9 will be administered to students under standard College Board national test administration and security protocols as specified in the PSAT 8/9 testing publications and PSAT 8/9 Test Coordinator training and instructional materials, unless otherwise stated in this Schedule. In accordance with College Board policies, any test irregularity, including mis-administrations or security breaches, will be thoroughly investigated and may result in score cancellations. Client is responsible for making all necessary arrangements to ensure that the testing environment and the security of all test materials satisfy College Board requirements as specified in the PSAT 8/9 Coordinator training and instructional materials. The test will be administered by Client-employed personnel, who will not receive additional remuneration from College Board. Client personnel must use TDTK in connection with the administration of the PSAT 8/9. This Agreement does not guarantee that all students registered by Client for the Program will actually test. It is the responsibility of Client to encourage students to complete the program. Students will follow the guidelines in applicable College Board digital student materials.

3. Client Testing Delays. Should an event occur that would require Participating School(s) to close for reasons beyond the reasonable control of such Participating School(s) (for example, including, but not limited to, severe weather, extended power outages, or a teacher's strike) (a "Delay Event"), the Participating School(s) should adjust testing until later in the Testing Window.

Client understands that by selecting the last week of a Testing Window as their main administration date, if there is a Delay Event, there may be no additional PSAT 8/9 test dates. In such cases, this Agreement remains in full force and effect. No additional administration of the assessment will be made available after the Testing Window.

VII. COLLEGE BOARD COLLECTION, USE AND DISCLOSURE OF DATA.

1. Client acknowledges and agrees that the data collected from the administration of the assessment ordered under this Agreement is subject to the terms below, which are further described within College Board's privacy policies, available at https://privacy.collegeboard.org.

College Board shall collect from Client, or Participating School, as applicable, the following student data in connection with the registration of the assessments you are ordering under this Agreement, with those asterisked required for registration. Client and College Board agree to comply with the Family Educational Rights and Privacy Act, 20 U.S.C. s. 1232g, and its implementing regulations, 34 C.F.R. pt. 99 ("FERPA"), as applicable. Client will obtain any and all consents necessary for students to participate in the assessment(s), if any.

- *First and last name
- Middle initial
- *Date of Birth
- *Attending institution (AI Code)
- *Grade
- *Gender
- *Test administration indicator (that is, which assessment)
- *Season for testing
- *Student identifier

For digital testing, College Board will receive certain information about the device used by the student and monitor and capture actions students take when using Bluebook to ensure the device is compatible for test security purposes, for test validation and research, as well as to develop and improve College Board products and services. We may disclose this information but only in aggregated and de-identified form.

2. College Board may also collect, retain, use and share students' personally identifiable information to perform this Agreement including for the purposes outlined below.

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c. For SAT, National Presidential Scholars: Data about eligible students are shared with the US Department of Education for purposes of the U.S. Presidential Scholars Programs. College Board will enter into an agreement with the US Department of Education for these purposes.
d. For PSAT/NMSQT and PSAT 10, National Recognition Programs: College Board uses student data to determine a student's eligibility to apply for and receive its National Recognition Programs, award(s), for administration of the National Recognition Program, and share information with the student, their high school and district, about the students' eligibility and recognition status.
e. For PSAT/NMSQT, College Board will share scores, data derived from scores, certain student demographic information, and other information provided by students during testing with the National Merit Scholarship Corporation (NMSC) in order for NMSC to determine whether students

are eligible for its National Merit Scholarship Program and administer this program in accordance with the PSAT/NMSQT Student Guide and www.nationalmerit.org. This includes NMSC sharing information with the students and their high school about the students' eligibility and recognition status.

f. Score Reporting to Students: College Board will report to the student the score achieved on assessments which are the subject matter of this Agreement, insights from those scores, and their AP Potential.
g. SAT Score Sends: Students may identify institutions to receive their SAT scores. Student scores and basic demographic information sufficient for identity matching are only provided to higher education institutions and scholarship organizations when authorized by students.
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j. Test Security: College Board may use student data to identify and investigate potential test security incidents, communicate with students about any such incidents, and protect and enhance test security. College Board may disclose the results of test security investigations with third parties, including to the student's school, any score recipient, college, higher education institution or agency, scholarship organization, potential score recipient government agency in the U.S or abroad, parents, legal guardians, or law enforcement.
k. Research: College Board may use de-identified student data for psychometric and educational research purposes to evaluate the validity of our assessments and ensure that tests are unbiased in terms of race, gender, and culture. College Board may use de-identified data to demonstrate the effectiveness of College Board programs and services. College Board may also use data to maintain, develop, support, improve and diagnose our services and applications.
l. Operational Third Parties: College Board may use and disclose personally identifiable information to third parties providing services to College Board as necessary for its performance of the services in this Agreement and others necessary to administer the SAT Suite and related services. These vendors cannot relicense, sell, rent, or otherwise repurpose the information. These organizations have contractual requirements to protect personally identifiable information from unauthorized access, use, or disclosure.
m. Other: College Board may disclose student data as required by law, when we believe in good faith that it's necessary to protect our rights, protect an individual's safety or the safety of others, investigate fraud, or respond to a government request.

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intended to diminish or interfere with student's personal rights in their assessment data, as students have rights independent of this Agreement to access, retain, and use their test scores, including for tests which are the subject matter of this Agreement, and no provisions in this Agreement are intended to address or cover data that College Board has, or may receive, for services which are outside the scope of this Agreement.

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d. Feedback mechanism for counselors.

Dates and Times of Service: **Available three months prior to primary test date**. Standard hours of operation: Monday through Friday 9:00 a.m. to 6:00 p.m. Eastern Standard Time. Customer service for the PSAT 8/9 Program can also be accessed online at the following web address: https://satsuite.collegeboard.org/contact-us.

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Except as expressly provided herein, Client is prohibited from copying, disseminating, publishing, displaying or distributing in any form, or reproducing any questions from the assessments including from digital testing or paper test booklets (if used) in whole or in part, without the prior written consent of College Board.

2. **Student Score Report License**. College Board hereby grants Client a limited, nonexclusive, nontransferable, non-assignable right to access and use the student score reports provided for the assessment(s) pursuant to this Agreement for the legitimate educational purposes of internal analysis, which includes your internal training sessions, as long as the data used during training preserves the confidentiality of students. Client may not use or distribute the score reports or the data derived from them externally or to third parties other than the student without the express written consent of College Board.

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1. Fees. The fee calculation for this Schedule is based on the Client selections in SSOR. Pricing adjustments that reduce the fee per test for an amount less than the retail price are provided at the sole discretion of College Board.

Clients will be charged the fee in the attached Budget Schedule based on the number of PSAT 8/9 tests submitted. The test volumes and total cost indicated in the Budget Schedule are estimates.

College Board reserves the right to suspend ordering for the SAT Suite of Assessments if Client has an outstanding undisputed invoice(s) to College Board in an amount greater than $300 for more than 90 days from the invoice date. Clients who have been suspended will be precluded from ordering any SAT Suite of Assessments in College Board's online ordering system until the invoice(s) has been paid in full. Access will not be denied if there is a third party (your District or State or another school) responsible for the payment of such outstanding invoices.

2. Restrictions. No student participating under this Schedule will be assessed an individual fee for taking the PSAT 8/9 exam.

XII. CLIENT CONTACT INFORMATION

	Primary[1]	Procurement[2]
Name:		
Title:		
Address:		
City/State/Zip:		
Phone:		
Fax:		
Email:		

[1] This is the person to whom College Board should direct primary communications.

[2] This is the person to whom College Board should send the contract for review and approval within the district procurement/contract department.

SCHEDULE to College Readiness and Success Agreement
CLEP® Voucher Ordering

I. SCOPE OF SERVICES

The College Board's College Level Examination Program® (CLEP®) offers the CLEP Voucher Ordering Program to allow institutions to cover the costs of CLEP exams for groups of test takers. CLEP is a credit-by-examination program that allows students to earn college credit by demonstrating college-level mastery of any of the 34 CLEP subjects.

Pursuant to this CLEP Voucher Ordering schedule (this "Schedule"), College Board shall make the CLEP exam and the following reports available to Client placing the purchase order by completing the CLEP Voucher Order Form attached hereto as Exhibit A (the "Purchase Order"). The Services are subject to the Terms and Conditions on Page 2 of the Purchase Order ("Purchase Order Terms and Conditions"), which are incorporated herein by this reference.

1. CLEP Vouchers in the quantity specified by Client in the Purchase Order. Client is responsible for distributing voucher codes to test takers and ensuring that test takers register for the correct exam(s). All unused voucher codes will expire on the date specified in the order form or June 30 of the current academic year (whichever occurs first).

2. For high school and school district purchasers only: CLEP Score Report for all test takers. High schools and school districts must access their respective student scores through College Board's My CLEP Professional. For more information on how to access scores, please visit clep.collegeboard.org/for-high-schools/get-student-scores

Registration.

Individual test takers must register for CLEP exams using the College Board's My CLEP Student Registration Portal. During the registration process, a CLEP voucher will be used in lieu of credit or debit card payment. Upon successful completion of the registration process, the voucher will be considered used. ***A test taker will then have up to six months or until the expiration date specified in the order form or until June 30 of the current academic year (whichever occurs first) to take the CLEP exam for which he or she has registered. After that time, the registration will expire.***

Test Administration.

CLEP vouchers do not restrict testing location, and registered candidates can test at any authorized CLEP test center. Client understands and agrees that all CLEP testing is also subject to the terms and conditions located in the *CLEP Administrator Manual*, a copy of which is available in the CLEP eLearning platform.

Student Score Reports.

If College Board furnishes a score report for the students participating under this Agreement, then College Board hereby grants the Client a limited, nonexclusive, nontransferable, non-assignable right to use the score reports and individual student data (collectively, "Student Data") for internal purposes only. Client shall keep the Student Data confidential and may not use or distribute the Student Data externally or to third parties without the express written consent of College Board.

Payment.

The fee for each CLEP exam and each remote proctoring session (if applicable) is published on the CLEP website at https://clep.collegeboard.org/register-for-an-exam. All fees are payable within 30 days of the invoice date.

Order of Precedence.

In the event of conflict between the Agreement (including this Schedule) and the Purchase Order Terms and Conditions, the terms and conditions of the Agreement (including this Schedule) shall prevail. The parties acknowledge and agree that each shall construe the terms, covenants, and conditions set forth in the Agreement (including Schedule) and the Purchase Order Terms and Conditions as consistent with one another insofar as possible, so as to give effect to the fullest extent possible to each particular clause.

II. CLIENT CONTACT INFORMATION

	Primary[1]	Billing[2]
Name:		
Title:		
Address:		
City/State/Zip:		
Phone:		
Email:		

IV. FEE CALCULATION AND BUDGET SCHEDULE

The fee is $97.00 per CLEP exam taken. Upon request, Client shall provide the actual number of administered exams by participating school to College Board after the administration of the exam.

Item	Quantity	Unit Price	Amount
CLEP Exams		$97.00	$
CLEP Remote Proctoring Fee		$30.00	
CLEP Score Reports		$0.00	$0.00
Total			$

[1] The person to whom the College Board should direct primary communications.

[2] The person to whom the College Board should send the invoice for this Schedule, if different from the Primary Contact.

EXHIBIT A
CLEP® Voucher Order Form

2025-26 CLEP Voucher Order Form (with Remote Proctoring)

This form allows institutions to cover the costs of CLEP exams for groups of test takers. Purchasing institutions will receive voucher codes that test takers can use to register for CLEP exams online. Purchasing institutions agree to pay the standard fee for each CLEP exam and each remote proctoring session (if applicable) published on the CLEP website at https://clep.collegeboard.org/register-for-an-exam. **To order voucher codes, complete all fields in this form and return it to clep@collegeboard.org.**

Purchaser Institution

Institution name

Primary Contact

Voucher codes and student scores (if applicable) ***will be sent to primary contact via email.***

Name
Title
Address 1 **City**
Address 2 **State** **ZIP**
Email **Phone**

Voucher and Testing Information

Voucher code quantity

All unused vouchers will expire on June 30 of the current academic year. Vouchers will not be valid after this date.

Indicate specific testing dates or ranges, including month, date, and year, when students will be testing.

Test Dates

IMPORTANT:
Be sure to order enough voucher codes. There is no penalty for over-ordering. Only *used* vouchers will be invoiced. We recommend ordering 20% more that you expect to use.

Voucher codes can be used for any of the 34 CLEP exams. Purchaser is responsible for ensuring that students register for the correct exam.

VOUCHER DELIVERY DATE:
To receive vouchers in a timely manner a complete and accurate order form must be submitted to clep@collegeboard.org. Please note that processing

Billing and Payment Information

Provide billing contact below. Billing contact will receive all invoices.

Name
Title
Address 1 **City**
Address 2 **State** **ZIP**
Email **Phone**

Enter purchase order number and submit purchase order along with this order form to clep@collegeboard.org.

Purchase order number

Maximum cost (if all codes used): $0

Authorization

By signing below, Purchaser Institution verifies that all information in this form is accurate and Authorized Purchaser is authorized to execute this order on behalf of the institution indicated. Purchaser Institution understands and accepts all Terms and Conditions stated on the second page of this form.

Authorized Purchaser (Print Name):

Signature of Authorized Purchaser (sign or insert image of signature): **Date:**

Terms and Conditions

Institution is providing funding for certain test takers to take the College Level Examination Program® (CLEP®) exams.

By completing this CLEP Voucher Order Form ("Purchase Order"), Institution ("Customer" or "You") is entering into a binding contract with College Board for the purchase of CLEP and accepts these Terms and Conditions. You will comply with these Terms and Conditions which incorporates and supplements the Legal Terms for Educators and Institutions (https://privacy.collegeboard.org/educator-legal-terms?navId=gf-edterms). In the event there is a conflict or inconsistency between these Terms and Conditions and other purchasing documents between College Board and Customer relating to CLEP, these Terms and Conditions shall control; provided, however, in case Customer acquires CLEP pursuant a separate written agreement with College Board, including College Board's College Readiness Agreement, the terms of that written agreement shall control to the extent of any conflict.

CLEP Program Overview. College Board's CLEP Program is a credit-by-examination program that allows students to earn college credit by demonstrating college-level mastery of any of the 34 CLEP subjects. The credit-granting score and credit awarded for successful scores on each exam varies by institution and is determined by each college or university. CLEP does not guarantee a minimum credit award at any institution.

Ordering. Only complete and accurate orders will be processed. Vouchers will be delivered according to the timelines specified in the Purchase Order.

Voucher Codes. College Board shall furnish Customer with the specified number of voucher codes. Customer is responsible for distributing voucher codes to test takers and ensuring that test takers register for the correct exam(s). All unused voucher codes will expire on the date specified in the Order Form or June 30 of the current academic year (whichever occurs first).

Registration. Individual test takers must register for CLEP exams using the College Board's My CLEP Student Registration Portal. During the registration process, a CLEP voucher will be used in lieu of credit or debit card payment. Upon successful completion of the registration process, the voucher will be considered used. *A test taker will then have up to six months or until the expiration date specified in the order form or June 30 of the current academic year (whichever occurs first) to take the CLEP exam for which he or she has registered.* After that time, the registration will expire.

Test administration. CLEP vouchers do not restrict testing location, and registered candidates can test at any authorized CLEP test center. Customer understands and agrees that all CLEP testing is also subject to the terms and conditions located in the CLEP Test Administrator Handbook, a copy of which is available in the CLEP eLearning platform, which provides the training to become a certified test center administrator.

Student Score Reports. Test takers' scores are available for high school and school district purchasers only and must be accessed through the My CLEP Professional Portal (https://myclep.collegeboard.org/). If College Board furnishes a score report for the students participating using the voucher codes issued pursuant to the Purchase Order, then the College Board hereby grants the Customer a limited, nonexclusive, nontransferable, non-assignable right to access and use the student score reports and individual student data (collectively,"Student Data") for internal purposes only. Customer shall keep the Student Data confidential and may not use or distribute the Student Data externally or to third parties other than the student without the express written consent of the College Board.

Payment. The fee for each CLEP exam and each remote proctoring session (if applicable) is published on the CLEP website at https://clep.collegeboard.org/register-for-an-exam. All fees are payable within 30 days of the invoice date.

Ownership of Intellectual Property. College Board is the exclusive owner of all rights in and to the CLEP examination, all individual test items (questions) and all data collected therefrom, including but not limited to, all personally identifiable information collected under the registration and administration of the exam. In addition, the College Board is the exclusive owner of CLEP and the related publications and reports, including all copyrights, trademarks, trade secrets, patents, and other similar proprietary rights, and all renewals and extensions thereof (collectively, "College Board Intellectual Property"). Customer acknowledges and agrees that nothing in the Purchase Order, including these Terms and Conditions, shall be interpreted to indicate that the College Board is passing its proprietary rights in and to College Board Intellectual Property to Customer. Copying, disseminating or posting any CLEP material on an internal or external website, including social media sites, is a breach of these Terms and Conditions. Nothing in these Terms and Conditions is intended to diminish or interfere with student rights in their assessment data.

General Disclaimer. COLLEGE BOARD MAKES NO WARRANTIES WHATSOEVER AND PROVIDES CLEP ON AN "AS IS" AND "AS AVAILABLE" BASIS. COLLEGE BOARD HEREBY DISCLAIMS ALL OTHER WARRANTIES, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT OF THIRD- PARTY RIGHTS. COLLEGE BOARD DOES NOT WARRANT THE OPERATION OF THE DELIVERABLES TO BE UNINTERRUPTED OR ERROR-FREE OR THAT ALL DEFICIENCIES OR ERRORS ARE CAPABLE OF BEING CORRECTED. FURTHERMORE, COLLEGE BOARD DOES NOT WARRANT OR MAKE ANY REPRESENTATIONS REGARDING THE USE OF CLEP OR THE RESULTS OBTAINED THEREFROM OR THAT CLEP WILL SATISFY CLIENT'S REQUIREMENTS.

Limitation of Liability. TO THE EXTENT PERMITTED BY LAW, THE TOTAL LIABILITY, IN THE AGGREGATE, OF COLLEGE BOARD AND ITS OFFICERS, TRUSTEES, PARTNERS, EMPLOYEES, AGENTS AND COLLEGE BOARD'S SUBCONTRACTORS AND CONSULTANTS, AND ANY OF THEM, TO CLIENT AND ANYONE CLAIMING BY, THROUGH OR UNDER CLIENT, FOR ANY AND ALL CLAIMS, LOSSES, COSTS, OR DAMAGES WHATSOEVER ARISING OUT OF, RESULTING FROM OR IN ANY WAY RELATED TO THE PURCHASE ORDER OR THE WORK PERFORMED BY COLLEGE BOARD PURSUANT TO THE PURCHASE ORDER FROM ANY CAUSE OR CAUSES, INCLUDED BUT NOT LIMITED TO THE NEGLIGENCE, PROFESSIONAL ERRORS OR OMISSIONS, STRICT LIABILITY OR BREACH OF CONTRACT OR WARRANTY EXPRESS OR IMPLIED OF COLLEGE BOARD OR COLLEGE BOARD'S OFFICERS, TRUSTEES, PARTNERS, EMPLOYEES, AGENTS, SUBCONTRACTORS OR CONSULTANTS OR ANY OF THEM, SHALL NOT EXCEED THE ACTUAL AMOUNT PAID TO COLLEGE BOARD UNDER THIS PURCHASE ORDER FOR THE SPECIFIC EXAM SUBJECT TO THE DAMAGES CLAIM.

IN NO EVENT SHALL EITHER PARTY, THEIR AFFILIATES OR THEIR SUBCONTRACTORS BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL, EXEMPLARY, OR PUNITIVE DAMAGES (INCLUDING, BUT NOT LIMITED TO, ANY DAMAGES FOR LOSS OF PROFITS OR SAVINGS, LOSS OF USE, BUSINESS INTERRUPTION OR THE LIKE), EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Arbitration. Other than disputes involving infringement of College Board's intellectual property rights, all disputes against College Board and/or any or all of its contractors, that relate in any way to registering for or taking a CLEP exam, including but not limited to requesting or receiving test accommodations, score reporting, and the use of test taker data, shall exclusively be resolved by a single arbitrator through binding, individual arbitration administered by the American Arbitration Association ("AAA"), under the AAA Consumer Arbitration Rules in effect at the time a request for arbitration is filed with the AAA. Copies of the AAA Rules can be located at www.adr.org. Unless the parties mutually agree otherwise, the seat and the place of the arbitration shall be New York, New York. The parties agree that the Federal Arbitration Act ("FAA"), 9 U.S.C. § 1 et seq. governs this provision, and it is the intent of the parties that the FAA shall pre-empt all State laws to the fullest extent permitted by law. No arbitration may be maintained as a class action, and the arbitrator shall not have the authority to combine or aggregate the disputes of more than one individual, conduct any class proceeding, make any class award, or make an award to any person or entity not a party to the arbitration, without the express written consent of College Board. By agreeing to arbitration in accordance with this section, you are waiving your right to have your dispute heard by a judge or jury. Each party will be responsible for its own fees and expenses incurred in connection with the arbitration, regardless of its outcome. For purposes of this provision, each College Board contractor is a third-party beneficiary of this section, is entitled to the rights and benefits hereunder, and may enforce the provisions hereof as if it were a party hereto.

Governing Law; Severability.
If permitted by applicable law, this Agreement shall be construed under the laws of the State of New York. In the event that any provision of this Agreement is deemed invalid or unenforceable, the other provisions of this Agreement shall continue in full force and effect.

Relationship of the Parties. The relationship of the Customer and College Board is that of independent contractors. Neither party nor their employees are partners, agents, employees, or joint ventures of the other party. Neither party shall have any authority to bind the other party to any obligation by contract or otherwise. College Board, its employees, and agents shall not be considered employees of the Client while performing the services and will not be entitled to fringe benefits normally accruing to employees of the Customer. Customer and College Board recognize and agree that College Board is an independent contractor.

If the Customer is using federal funds to pay for all or a portion of the CLEP exams, Customer acknowledges and agrees that College Board shall not be categorized as a "subrecipient" receiving a federal award as defined by OMB Circular Subpart A.210(c) of Circular No. A-133. College Board shall be defined as a "vendor" that provides good and services within normal business operations, provides similar goods or services to other purchasers and operates in a competitive environment. Customer acknowledges and agrees that the substance of the relationship with College Board is that of a vendor not a subrecipient.

CollegeBoard

2025-26 CLEP Voucher Order Form

This form allows institutions to cover the costs of CLEP exams for groups of test takers. Purchasing institutions will receive voucher codes that test takers can use to register for CLEP exams online. Purchasing institutions agree to pay the standard fee for each CLEP exam published on the CLEP website at https://clep.collegeboard.org/register-for-an-exam. **To order voucher codes, complete all fields in this form and return it to clep@collegeboard.org.**

Purchaser Institution

Institution name

Primary Contact

Voucher codes and student scores (if applicable) ***will be sent to primary contact via email.***

Name
Title
Address 1
Address 2
Email
City
State **ZIP**
Phone

Voucher and Testing Information

Voucher code quantity

All unused vouchers will expire on June 30 of the current academic year. Vouchers will not be valid after this date.

Indicate specific testing dates or ranges, including month, date, and year, when students will be testing.

Test Dates

IMPORTANT:
Be sure to order enough voucher codes. There is no penalty for over-ordering. Only *used* vouchers will be invoiced. We recommend ordering 20% more that you expect to use.

Voucher codes can be used for any of the 34 CLEP exams. Purchaser is responsible for ensuring that students register for the correct exam.

VOUCHER DELIVERY DATE:
To receive vouchers in a timely manner a complete and accurate order form must be submitted to clep@collegeboard.org. Please note that processing

Billing and Payment Information

Provide billing contact below. Billing contact will receive all invoices.

Name
Title
Address 1
Address 2
Email
City
State **ZIP**
Phone

Enter purchase order number and submit purchase order along with this order form to clep@collegeboard.org.

Purchase order number

Maximum cost (if all codes used): $0

Authorization

By signing below, Purchaser Institution verifies that all information in this form is accurate and Authorized Purchaser is authorized to execute this order on behalf of the institution indicated. Purchaser Institution understands and accepts all Terms and Conditions stated on the second page of this form.

Authorized Purchaser (Print Name):

Signature of Authorized Purchaser (sign or insert image of signature):

Date:

Terms and Conditions

Institution is providing funding for certain test takers to take the College Level Examination Program® (CLEP®) exams.

By completing this CLEP Voucher Order Form ("Purchase Order"), Institution ("Customer" or "You") is entering into a binding contract with College Board for the purchase of CLEP and accepts these Terms and Conditions. You will comply with these Terms and Conditions which incorporates and supplements the Legal Terms for Educators and Institutions (https://privacy.collegeboard.org/educator-legal-terms?navId=gf-edterms). In the event there is a conflict or inconsistency between these Terms and Conditions and other purchasing documents between College Board and Customer relating to CLEP, these Terms and Conditions shall control; provided, however, in case Customer acquires CLEP pursuant a separate written agreement with College Board, including College Board's College Readiness Agreement, the terms of that written agreement shall control to the extent of any conflict.

CLEP Program Overview. College Board's CLEP Program is a credit-by-examination program that allows students to earn college credit by demonstrating college-level mastery of any of the 34 CLEP subjects. The credit-granting score and credit awarded for successful scores on each exam varies by institution and is determined by each college or university. CLEP does not guarantee a minimum credit award at any institution.

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Test administration. CLEP vouchers do not restrict testing location, and registered candidates can test at any authorized CLEP test center. Customer understands and agrees that all CLEP testing is also subject to the terms and conditions located in the CLEP Test Administrator Handbook, a copy of which is available in the CLEP eLearning platform, which provides the training to become a certified test center administrator.

Student Score Reports. Test takers' scores are available for high school and school district purchasers only and must be accessed through the My CLEP Professional Portal (https://myclep.collegeboard.org). If College Board furnishes a score report for the students participating using the voucher codes issued pursuant to the Purchase Order, then the College Board hereby grants the Customer a limited, nonexclusive, nontransferable, non-assignable right to access and use the student score reports and individual student data (collectively,"Student Data") for internal purposes only. Customer shall keep the Student Data confidential and may not use or distribute the Student Data externally or to third parties other than the student without the express written consent of the College Board.

Payment. The fee for each CLEP exam and each remote proctoring session (if applicable) is published on the CLEP website at https://clep.collegeboard.org/register-for-an-exam. All fees are payable within 30 days of the invoice date.

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General Disclaimer. COLLEGE BOARD MAKES NO WARRANTIES WHATSOEVER AND PROVIDES CLEP ON AN "AS IS" AND "AS AVAILABLE" BASIS. COLLEGE BOARD HEREBY DISCLAIMS ALL OTHER WARRANTIES, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT OF THIRD-PARTY RIGHTS. COLLEGE BOARD DOES NOT WARRANT THE OPERATION OF THE DELIVERABLES TO BE UNINTERRUPTED OR ERROR-FREE OR THAT ALL DEFICIENCIES OR ERRORS ARE CAPABLE OF BEING CORRECTED. FURTHERMORE, COLLEGE BOARD DOES NOT WARRANT OR MAKE ANY REPRESENTATIONS REGARDING THE USE OF CLEP OR THE RESULTS OBTAINED THEREFROM OR THAT CLEP WILL SATISFY CLIENT'S REQUIREMENTS.

Limitation of Liability. TO THE EXTENT PERMITTED BY LAW, THE TOTAL LIABILITY, IN THE AGGREGATE, OF COLLEGE BOARD AND ITS OFFICERS, TRUSTEES, PARTNERS, EMPLOYEES, AGENTS AND COLLEGE BOARD'S SUBCONTRACTORS AND CONSULTANTS, AND ANY OF THEM, TO CLIENT AND ANYONE CLAIMING BY, THROUGH OR UNDER CLIENT, FOR ANY AND ALL CLAIMS, LOSSES, COSTS, OR DAMAGES WHATSOEVER ARISING OUT OF, RESULTING FROM OR IN ANY WAY RELATED TO THE PURCHASE ORDER OR THE WORK PERFORMED BY COLLEGE BOARD PURSUANT TO THE PURCHASE ORDER FROM ANY CAUSE OR CAUSES, INCLUDED BUT NOT LIMITED TO THE NEGLIGENCE, PROFESSIONAL ERRORS OR OMISSIONS, STRICT LIABILITY OR BREACH OF CONTRACT OR WARRANTY EXPRESS OR IMPLIED OF COLLEGE BOARD OR COLLEGE BOARD'S OFFICERS, TRUSTEES, PARTNERS, EMPLOYEES, AGENTS, SUBCONTRACTORS OR CONSULTANTS OR ANY OF THEM, SHALL NOT EXCEED THE ACTUAL AMOUNT PAID TO COLLEGE BOARD UNDER THIS PURCHASE ORDER FOR THE SPECIFIC EXAM SUBJECT TO THE DAMAGES CLAIM.

IN NO EVENT SHALL EITHER PARTY, THEIR AFFILIATES OR THEIR SUBCONTRACTORS BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL, EXEMPLARY, OR PUNITIVE DAMAGES (INCLUDING, BUT NOT LIMITED TO, ANY DAMAGES FOR LOSS OF PROFITS OR SAVINGS, LOSS OF USE, BUSINESS INTERRUPTION OR THE LIKE), EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Arbitration.
Other than disputes involving infringement of College Board's intellectual property rights, all disputes against College Board and/or any or all of its contractors, that relate in any way to registering for or taking a CLEP exam, including but not limited to requesting or receiving test accommodations, score reporting, and the use of test taker data, shall exclusively be resolved by a single arbitrator through binding, individual arbitration administered by the American Arbitration Association ("AAA"), under the AAA Consumer Arbitration Rules in effect at the time a request for arbitration is filed with the AAA. Copies of the AAA Rules can be located at www.adr.org. Unless the parties mutually agree otherwise, the seat and the place of the arbitration shall be New York, New York. The parties agree that the Federal Arbitration Act ("FAA"), 9 U.S.C. § 1 et seq. governs this provision, and it is the intent of the parties that the FAA shall pre-empt all State laws to the fullest extent permitted by law. No arbitration may be maintained as a class action, and the arbitrator shall not have the authority to combine or aggregate the disputes of more than one individual, conduct any class proceeding, make any class award, or make an award to any person or entity not a party to the arbitration, without the express written consent of College Board. By agreeing to arbitration in accordance with this section, you are waiving your right to have your dispute heard by a judge or jury. Each party will be responsible for its own fees and expenses incurred in connection with the arbitration, regardless of its outcome. For purposes of this provision, each College Board contractor is a third-party beneficiary of this section, is entitled to the rights and benefits hereunder, and may enforce the provisions hereof as if it were a party hereto.

Governing Law; Severability.
If permitted by applicable law, this Agreement shall be construed under the laws of the State of New York. In the event that any provision of this Agreement is deemed invalid or unenforceable, the other provisions of this Agreement shall continue in full force and effect.

Relationship of the Parties. The relationship of the Customer and College Board is that of independent contractors. Neither party nor their employees are partners, agents, employees, or joint ventures of the other party. Neither party shall have any authority to bind the other party to any obligation by contract or otherwise. College Board, its employees, and agents shall not be considered employees of the Customer while performing the services and will not be entitled to fringe benefits normally accruing to employees of the Customer. Customer and College Board recognize and agree that College Board is an independent contractor.

If the Customer is using federal funds to pay for all or a portion of the CLEP exams, Customer acknowledges and agrees that College Board shall not be categorized as a "subrecipient" receiving a federal award as defined by OMB Circular Subpart A.210(c) of Circular No. A-133. College Board shall be defined as a "vendor" that provides goods and services within normal business operations, provides similar goods or services to other purchasers and operates in a competitive environment. Customer acknowledges and agrees that the substance of the relationship with College Board is that of a vendor not a subrecipient.

CollegeBoard

TAB VIII EXCEPTIONS

Please note any and all exceptions taken to any part this Request for Proposal. If none are taken, please clearly state so. Do not mark through or otherwise alter the language of this RFP in your response.

College Board does not take exception to any part of this Request for Proposal.

TAB IX ATTACHMENTS

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS	
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE	
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT	
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident)	$1,000,000
			BODY INJURY (Per–Person)	
			BODY INJURY (Per-Accident)	
			PROPERTY DAMAGE (Per-Accident	
YES	4.	COMMERCIAL GENERAL LIABILITY		LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE	$ 1,000,000
			FIRE LEGAL LIABILITY	$ 100,000
			MED EXP (Per person)	$ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER POLICY X PROJECT LO	PERSONAL & ADV INJURY	$ 1,000,000
			GENERAL AGGREGATE	$ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE	$ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2,000,000 ANNUAL AGGREGATE	
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE	
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE	
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED	
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000	
NO		PROFESSIONAL LIABILITY		
NO NO NO NO	10.	ARCHITECTS &ENGINEERS ASBESTOS & REMOVAL LIABILITY MEDICAL MALPRACTICE MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM $2,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM	
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM	
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)	
NO	13.	MOTOR CARGO INSURANCE		
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE	
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION	
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$	
NO	17.	DISHONESTY BOND	$	
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.	
NO	19.	USL&H	FEDERAL STATUTORY LIMITS	

20. **Carrier rating shall be Best's Rating of A-VII or better or its equivalent.**

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. **The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.**

23. **Certificate of Insurance shall show the RFP number and title.**

Insurance Agent's Statement and certification: I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.

Conner Strong and Buckelew

Agency Name: Andrew Wagner **Authorizing Signature:** _____

Proposer's Statement and Certification: If awarded the Contract, I will comply with the Contract insurance requirements.

Proposer's Name: Jeremy Singer **Authorizing Signature:** _____

Client#: 353512 COLLEBOARD

ACORD™ CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 9/30/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME: Chelsea Miller	
Conner Strong & Buckelew PO Box 99106 Camden, NJ 08101	PHONE (A/C, No, Ext): 856-479-2069	FAX (A/C, No):
	E-MAIL ADDRESS: cmiller@connerstrong.com	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A : Liberty Insurance Corporation	42404
INSURED College Board 250 Vesey Street New York, NY 10281	INSURER B : Liberty Mutual Fire Insurance Company	23035
	INSURER C : AIG Specialty Insurance Company	26883
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY	X		TB7Z51292899025	01/01/2025	01/01/2026	EACH OCCURRENCE	$1,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$1,000,000
							MED EXP (Any one person)	$10,000
							PERSONAL & ADV INJURY	$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$2,000,000
	X POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$2,000,000
	OTHER:							$
B	AUTOMOBILE LIABILITY			AS2Z51292899035	01/01/2025	01/01/2026	COMBINED SINGLE LIMIT (Ea accident)	$1,000,000
	ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	X HIRED AUTOS ONLY / X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
A	X UMBRELLA LIAB X OCCUR			TH7Z51292899065	01/01/2025	01/01/2026	EACH OCCURRENCE	$25,000,000
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$25,000,000
	DED RETENTION $							$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			WC2Z51292899015	01/01/2025	01/01/2026	X PER STATUTE OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N	N/A					E.L. EACH ACCIDENT	$1,000,000
	(Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$1,000,000
							E.L. DISEASE - POLICY LIMIT	$1,000,000
C	Professional Liability			028245032	01/01/2025	01/01/2026	$10,000,000 Claim/Agg.	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Re: Proposal number:3688 Advanced Academics Program

Knox County Schools are included as Additional Insured on the above referenced Commercial General Liability Policy if required by written contract.

CERTIFICATE HOLDER

Knox County Schools
400 W. Summit Hill Drive
Knoxville, TN 37902

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF. NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

W. Michael Trapnell

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ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, Jeremy Singer, president or other principal

Officer of College Board, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

President or Principal Officer

For: College Board
Name of Company

STATE OF NEW YORK}
COUNTY OF }

Subscribed and sworn before me by Jeremy Singer.

President or principal officer of College Board.

On this 1st day of October 2025

Nicole Simone McIntyre
Notary Public

My Commission expires: 5/17/2027

NICOLE SIMONE MCINTYRE
NOTARY PUBLIC, STATE OF NEW YORK
Registration No. 01MC6236022
Qualified in Nassau County
My Commission Expires. 5/17/2027

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature: _____
(sign in blue ink)

Title: President Date: 10/1/2025

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature: _____
(sign in blue ink)

Title: President Date: 10/1/2025

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:
Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying," in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

TAB VI PROPOSED COSTS

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$_____per school Notes:
Application Fees	$_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes: See attachments for pricing details.
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students: See attachments for pricing details.
Exam Fees	$_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site See attachments for pricing details. • Webinar/Virtual See attachments for pricing details.
Other Expenses:	See attachments for pricing details.
Optional Features/Add-ons:	See attachments for pricing details.

The included prices for College Board tests, services and deliverables are based on the proposed prices for the 2025-26 school year. Any references to prices for subsequent years are solely for projection purposes and may be subject to change based on College Board's then-current costs, policies and procedures.

CollegeBoard

Assessment Pricing

Assessment	Price
Advanced Placement® (AP®) Exams (including AP Seminar and AP Research)	$99.00 per exam (2025-26)
CLEP®	$97.00 per test (2025-26)
SAT Weekend	$68.00 per test (2025-26)
SAT School Day	$60.00 per test (2025-26)
PSAT™ 8/9	$14.00 per test (2025-26)
PSAT™ 10	$18.00 per test (2025-26)
PSAT/NMSQT®	$18.00 per test (2025-26)

The included prices for College Board tests, services and deliverables are based on the current prices for each program/service. Prices may be subject to change based on the College Board's then-current costs, policies, and procedures.

Low-Income and Multiple Assessment pricing adjustments may be available for all SAT Suite Assessments.

Pre-AP Course Price List

Pre-AP courses empower all students to learn, grow, and succeed through focused course frameworks, horizontally and vertically aligned instruction, and assessments for learning. Pre-AP delivers grade-level appropriate courses designed to engage and motivate all students across varying levels of readiness.

Prepare More Students with Free Pre-AP

Pre-AP delivers content and skills to prepare students for success in AP®. Beginning in the 2025-26 school year, all Pre-AP courses will be available at no cost to schools that enroll 12th-grade students in AP Precalculus or 10th-grade students in AP African American Studies, AP Computer Science Principles, AP Seminar, or English 10: AP Seminar.

Pre-AP Course Price

For schools that don't qualify for the above offer, we've simplified the price of Pre-AP courses. Each course is now available at the price of $1500 per course per school, with unlimited student enrollment. Further, we continue to offer the Pre-AP Arts courses at no charge with the purchase of one Pre-AP course.

The following courses are available for purchase at $1500 per course:

Pre-AP Algebra 1 | Pre-AP Algebra 2 | Pre-AP Biology | Pre-AP Chemistry | Pre-AP English 1 | Pre-AP English 2 | Pre-AP World History and Geography Pathway 1 | Pre-AP History and Geography Pathway 2 | Pre-AP Geometry with Statistics

The following courses are available at no charge with the purchase of a paid Pre-AP Course:

Pre-AP Dance | Pre-AP Music | Pre-AP Theatre | Pre-AP Visual Arts

What's Included in the Course Price

Each Pre-AP course includes the following:

Instructional Resources
- Full-year course framework
- Digital instructional resources for each course

Assessments for Learning
- 8 digital assessments per course*
- 4 student performance tasks per course
- Pre-AP Question Bank*

Development for Pre-AP Teachers
- Online Foundational Modules Series: On-demand professional learning available on Pre-AP Classroom; carries 21 hours of credit.
- Online Scoring Modules: Course teachers have access to online modules to learn how to accurately score and provide effective student feedback for Pre-AP performance tasks.
- Development for Pre-AP Leaders Online Foundational Leadership Workshop: On-demand professional learning available on Pre-AP Classroom; carries 4–6 hours of credit.

Additional
- Official Pre-AP course designation

*Not available for Pre-AP Arts courses.

Student and Teacher Print Resources

While digital versions of the student and teacher resources are included in the course price, some schools choose to order print versions of these materials.

The following Student Print Resources are available for purchase at $7 per student:

Pre-AP Algebra 1 | Pre-AP Algebra 2 | Pre-AP Biology | Pre-AP Chemistry | Pre-AP English 1 | Pre-AP English 2 | Pre-AP World History and Geography Pathway 1 | Pre-AP History and Geography Pathway 2 | Pre-AP Geometry with Statistics | Pre-AP Dance | Pre-AP Music | Pre-AP Theatre | Pre-AP Visual Arts

The following Teacher Print Resources are available for purchase at $45 per student:

Pre-AP Algebra 1 | Pre-AP Algebra 2 | Pre-AP Biology | Pre-AP Chemistry | Pre-AP English 1 | Pre-AP English 2 | Pre-AP World History and Geography Pathway 1 | Pre-AP History and Geography Pathway 2 | Pre-AP Geometry with Statistics | Pre-AP Dance | Pre-AP Music | Pre-AP Theatre | Pre-AP Visual Arts

*Not available for Pre-AP Arts courses.

AP Professional Learning Pricing*

AP In-person Workshop

	Pricing
AP Subject or Cross-Curricular Workshop (1/2 day - 3 hours; 30 teachers)	$ 3,900
AP Subject Workshop (1 day - 6 hours; 30 teachers)	$ 5,250
AP Subject Workshop (2 day - 12 hours; 30 teachers)	$ 9,188
AP Subject Workshop (3 day - 18 hours; 30 teachers)	$ 13,125
AP Subject Workshop (4 day - 24 hours; 30 teachers)	$ 17,500
AP Subject Workshop (5 day - 30 hours; 30 teachers)	$ 21,000

AP Online Workshop

	Pricing
AP Subject or Cross-Curricular Workshop (1/2 day - 3 hours; 25 teachers)	$ 3,120
AP Subject Workshop (1 day - 6 hours; 25 teachers)	$ 4,200
AP Subject Workshop (2 day - 12 hours; 25 teachers)	$ 7,350
AP Subject Workshop (3 day - 18 hours; 25 teachers)	$ 10,500
AP Subject Workshop (4 day - 24 hours; 25 teachers)	$ 14,000
AP Subject Workshop (5 day - 30 hours; 25 teachers)	$ 16,800

Achieving AP Access for All Workshop

	Pricing
AP Workshop (Online, 7.5 hours; 25 teachers)	$ 5,800
AP Workshop (In-person, 7.5 hours; 30 teachers)	$ 6,960

**Please note states, schools or districts who are College Board members receive a 15% discount. For more information about becoming a member institution, visit our website:* https://membership.collegeboard.org/

SY2025-26 Pre-AP Professional Learning Service List								
Pre-AP Professional Learning Catalog: https://rise.articulate.com/share/WhsiA-7rmxVX9NKJPOClDXZuLVCvIBWU								
Portfolio	**Service**	**Delivery Method**	**Public Registration / Private Orders**	**Member Price**	**Non-Member Price**	**Link to Order Form**	**Availability**	**Audience**
Pre-AP Readiness Workshops		In-Person	Private Orders	$4,600	$5,250	order form	Available for order year round. Orders must be place 60 days in advance of service dates.	For teachers and leaders of grades 6–12, to introduce the design and pedagogy of the Pre-AP Program
		Virtual	Private Orders	$2,500	$2,850	order form	Available for order year round. Orders must be place 30 days in advance of service dates.	For teachers and leaders of grades 6–12, to introduce the design and pedagogy of the Pre-AP Program
Pre-AP Course Teacher and Leader Professional Learning	**Pre-AP Online Module Series**	On-Demand	N/A	$0	$0	N/A	Available on-demand through Pre-AP Classroom after May 1, 2025.	Free, on-demand professional learning for teachers and leaders implementing Pre-AP Courses. Includes Foundational, Scoring, and Experienced Series.
	Pre-AP Summer Institute	In-Person	Private Orders	$9,500	$11,000	order form	Ordering opens January 27, 2025 for the 2025-26 school year. Services begin May 1, 2025.	Foundational professional learning for teachers new to implementing Pre-AP Courses.
		Virtual	Private Orders	$3,680	$4,200	order form	Ordering opens January 27, 2025 for the 2025-26 school year. Services begin May 1, 2025.	Foundational professional learning for teachers new to implementing Pre-AP Courses.
		Virtual	Public Registration	$175	N/A	calendar	Registration opens March 1, 2025. Services begin May 1, 2025.	Foundational professional learning for teachers new to implementing Pre-AP Courses.
	Pre-AP Leadership Workshop	In-Person	Private Orders	$4,600	$5,250	order form	Ordering opens January 27, 2025. Services available year round.	Foundational professional learning for school and district level leaders new to implementing Pre-AP Courses.
		Virtual	Private Orders	$3,680	$4,200	order form	Ordering opens January 27, 2025. Services available year round.	Foundational professional learning for school and district level leaders new to implementing Pre-AP Courses.
		Virtual	Public Registration	$175	N/A	calendar	Registration opens March 1, 2025. Services begin May 1, 2025.	Foundational professional learning for school and district level leaders new to implementing Pre-AP Courses.
	Experienced Teacher & Vertical Teams Workshops	In-Person	Private Orders	$4,600	$5,250	order form	Ordering opens January 27, 2025 for the 2025-26 school year. Services begin May 1, 2025.	Experienced Teacher Workshops available for English, Math, Science, and Social Studies. Vertical Teams Workshops available for Pre-AP English 1 and English 10: AP Seminar or Pre-AP Mathematics and AP Precalculus.
	Customized Pre-AP Leadership Service	In-Person	Private Orders	$4,600	$5,250	order form	Ordering opens January 27, 2025. Services available year round.	Customized for site and district level leaders to address local needs.
		Virtual	Private Orders	$3,680	$4,200	order form	Ordering opens January 27, 2025. Services available year round.	Site and district level leaders deepen program knowledge and focus on key topics to help meet the needs of their teachers and students.
	Pre-AP Observation Service	In-Person	Private Orders	$4,600	$5,250	order form	Ordering opens January 27, 2025. Services available year round.	Observation service for school and district level administrators implementing Pre-AP Courses.

Knox County Government

and

International Baccalaureate Organization

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and International Baccalaureate Organization, hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this Contract.** This Contract commences on the 1st day of April 2026 and ends the 30th day of September 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. Upon the mutual agreement of the vendor and the County, the award may be extended for five (5) additional one-year periods. This may result in a total of five (5) years, five (5) months and four (4) weeks. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. **Subcontracting/partnerships:** Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. **Payment.** Contractor warrants that the pricing shall remain firm for the initial period. At the end of the first period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. **Inspection and acceptance:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. **Termination.** Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) calendar days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. **Appropriations.** In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. **Contractor Default:** Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. **Independent contractor.** Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. **Compliance with all federal, state, and municipal laws.** Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. **Criminal history records check:** Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. **Severability clause.** If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. **Prohibition against assignment.** Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. **This Contract** shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. **Right to inspect.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. **Nondiscrimination and non-conflict statements.** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. **Books and records.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will be provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any

kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____
BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ GLENN JACOBS
MAYOR – Signature MAYOR

Date:_____

KNOX COUNTY LAW DIRECTOR'S OFFICE
CONTRACT NO. 26-105 (C)
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

Gary Dugger
_____
LAW DIRECTOR – Signature **LAW DIRECTOR – Printed Name**

Date: 2/20/2026

CONTRACTOR

_____ _____
AUTHORIZED SIGNATURE **CONTRACTOR – Printed Name**

INTERNATIONAL BACCALAUREATE ORGANIZATION
COMPANY NAME

Date:_____

The Procurement Division of Knox County, Tennessee will receive sealed proposals for the provision of **Advanced Academics Program** as specified herein. Proposals must be received by **2:00 p.m.** on **October 14, 2025**. Late proposals will neither be considered nor returned.

Deliver Proposals To:

Proposal Number 3688
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, Tennessee 37917

The Proposal Envelope must show the Proposal Number, Proposal Name & Proposal Closing Date.

SECTION I PROPOSAL PREPARATION AND SUBMISSION

1.1 **ADDITIONAL INFORMATION:** Knox County wants requests for additional information routed to Jay Garrison, Procurement Coordinator, CPPO, CPPB at 865.215.5767. Questions may be faxed to 865.215.5778 or emailed to jay.garrison@knoxcounty.org. If you have not heard from the Buyer in a reasonable amount of time, please call for further assistance. Information about the Knox County Procurement Division and current solicitations may be obtained on the Internet at www.knoxcounty.org/procurement.

1.2 **ACCEPTANCE:** Vendors shall hold their price firm and subject to acceptance by Knox County for a period of one hundred twenty (120) business days from the date of the proposal closing, unless otherwise indicated in their proposal.

1.3 **ALTERNATIVE PROPOSALS:** Knox County will not accept alternate proposals (those not equal to specifications) unless authorized by the Request for Proposal.

1.4 **AUDIT HOTLINE:** Knox County has established an Audit Hotline to report potential fraud and waste. To report potential fraud, waste or abuse, please file a report online by accessing http://www.knoxcounty.org/audit/hotline.php.

Vendors are hereby cautioned that this Audit Hotline does not replace the Award Protest Procedures found in Section VI, Item M of the Knox County Procurement Regulations.

1.5 **AWARD:** Award will be made to the most responsive, responsible proposer(s) meeting specifications and presenting the product(s) and/or service(s) that is in the best interest of Knox County. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple award. Knox County reserves the right to not award this proposal. Award will be made in accordance with the evaluation criteria specified herein.

1.6 **BUSINESS OUTREACH PROGRAM:** Knox County has established a Business Outreach Program which has the responsibility of increasing opportunity for small, minority and women owned businesses. This is being accomplished through community education programs, policy edification, active recruitment of interested businesses and process re-engineering.

Knox County is committed to ensuring full and equitable participation for all disadvantaged businesses. Knox County welcomes submittals from those disadvantaged businesses that have an interest in providing goods and/or services listed herein. In addition, Knox County strongly encourages the inclusion of disadvantaged businesses by non-disadvantaged Contractors who wish to partner or subcontract portions of this agreement in order to accomplish the successful delivery of goods and/or services. If you are a disadvantaged business and would like additional information about our Business Outreach Program, please contact:

Diane Woods, Business Outreach Administrator
Telephone: 865.215.5760
Fax: 865.215.5778
Email: diane.woods@knoxcounty.org

1.7 **CONFLICT OF INTEREST:** Vendors must have read and comply with the "Non-Conflict of Interest" statement provided in the vendor registration process prior to the closing of this solicitation. Knox County's Non-Conflict of Interest Policy is available for review at https://www.knoxcounty.org/purchasing/conflict_policy.php.

1.8 **COPIES:** Knox County requires that proposals be submitted as one (1) marked as original and one (1) exact copy. **Proposers must submit with their written response an exact electronic version of their proposal in a single PDF file on a flash drive format.**

1.9 **DECLARATIVE STATEMENTS:** Any statement or words (e.g.: must, shall, will) are declarative statements and the vendor must comply with the condition. Failure to comply with any such condition may result in the proposal being considered non-responsive and disqualified.

1.10 **ELECTRONIC TRANSMISSION OF PROPOSALS:** Knox County's Procurement Division will not accept electronically transmitted proposals. Facsimile and email submissions are strictly prohibited. Due to the nature of the information requested, all submissions shall be in written format.

1.11 **HOW TO DO BUSINESS:** Knox County utilizes a web-based Procurement software system, "KnoxBuys." The system provides our clients (vendors, county departments and the citizens of Knox County) with a more enhanced and end-user friendly means of accessing our services. The system allows for on-line vendor registration and maintenance, electronic receipt of purchase orders, on-line retrieval and submittal of quotes, bids and proposals for our vendor-clients and on-line requisitioning and receiving for our county departments. In order for the County to maximize its investment and minimize the cost associated with office operations, we need your help. When doing business with Knox County, we are urging you to please go to our website at www.knoxcounty.org/procurement, register as a vendor in our on-line Procurement system, "KnoxBuys," if you have not done so and whenever possible to conduct your business with the County through this site. If you have any questions, please contact the Procurement Division Representative listed in Section 1.1 of this document.

1.12 **INCURRED COSTS:** Knox County will not be responsible for any costs incurred by the proposer in the preparation of their proposal.

1.13 **MULTIPLE PROPOSALS:** Knox County will consider multiple proposals that meet specifications.

1.14 **NON-COLLUSION:** Proposers, by submitting a signed proposal, certify that the accompanying proposal is not the result of, or affected by, any unlawful act of collusion with any other person or company engaged in the same line of business or commerce, or any other fraudulent act punishable under Tennessee or United States law.

1.15 **PAYMENT METHOD:** Knox County will utilize a Purchase Order for placing an order for products and/or services. Purchase Orders will be issued from the Knox County Procurement Division via the method selected by the vendor during registration. The Purchase Order will detail the quantity, specific item(s) and the contracted price for each item. Work on this project must not commence until a signed Purchase Order is issued by Knox County Procurement.

1.16 **POSSESSION OF WEAPONS:** All vendors, their employees and their agents are prohibited from possessing any weapons on Knox County property without prior written consent from the County. In the case of a vendor whose Contract requires possession of firearms or other weapons to successfully complete their Contract, vendor must provide personnel who are bonded to bear said weaponry.

1.17 **PROCESSING TIME FOR PAYMENT:** Vendors are advised that a minimum of thirty (30) days is required to process invoices for payment.

1.18 **PROOF OF FINANCIAL AND BUSINESS CAPABILITY:** Vendors must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these specifications. Knox County will make the final determination as to the vendor's ability.

1.19 **PROPOSAL DELIVERY:** Knox County requires proposers, when hand delivering proposals, to time and date stamp the envelope before depositing it in the bid box. Knox County will not be responsible for any lost or misdirected mail sent by common carrier, nor will Knox County be responsible for proposals delivered to addresses or Suites other than the delivery address and Suite specified at the top of this solicitation. The time clock in the Procurement Division shall serve as the official record of time.

Solicitations must be in a sealed envelope/box prior to entering the Procurement Division office. Procurement Division personnel are not allowed to see the submittal nor assist in placing documents in an envelope/box. Additionally, the Procurement Division is not responsible for providing materials (e.g. envelopes, boxes, tape) for submittals.

1.20 **RECYCLING:** Knox County, in its continuing efforts to lessen the amount of landfill waste and to further recycling efforts, requests that proposals being submitted on paper shall:

1.20.1 Be submitted on recycled paper;
1.20.2 Not include pages of unnecessary advertising;
1.20.3 Be made on both sides of each sheet of paper.

1.21 **RESTRICTIVE OR AMBIGUOUS SPECIFICATIONS:** It is the responsibility of the prospective proposer to review the entire Request for Proposal packet and to notify the Procurement Division if the specifications are formulated in a manner that would unnecessarily restrict competition. Any such protest or question regarding the specifications or proposing procedures must be received in the Procurement Division by **September 26, 2025 at 4:30 p.m. local time**. These requirements also apply to specifications that are ambiguous.

1.22 **SIGNING OF PROPOSALS:** In order to be considered, all proposals must be signed. Please sign the original in blue ink. By submitting a signed letter authorizing the submission of the proposal, the vendor acknowledges and accepts the terms and conditions stated in the proposal document.

1.23 **TAXES:** Knox County purchases are not subject to taxation. Tax exemption certificates will be provided upon request.

1.24 **TITLE VI OF THE 1964 CIVIL RIGHTS ACT AND TITLE IX OF THE EDUCATIONAL AMENDMENT OF 1972:** "Nondiscrimination in Federally Assisted Programs"—"No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." 42 U.S.C. Section 2000. It is the policy of Knox County Government that all its services and activities be administered in conformance with the requirements of Title VI and Title IX.

1.25 **UNFORESEEN CIRCUMSTANCES:** During periods of closure due to unforeseen circumstances in Knox County or closures at the direction of the Knox County Mayor, the Procurement Division will enact the following procedures in regard to solicitations and closures:

- If the Mayor closes the Administrative offices prior to the time set for solicitation opening of any business day, all solicitations due that same day will be moved to the next operational business day.
- Other unforeseen circumstances shall be at the sole discretion of the Procurement Director.
- Knox County shall not be liable for any commercial carrier's decision regarding deliveries during any unforeseen circumstances.

1.26 **USE OF PROPOSAL FORMS:** Vendors must complete the proposal forms contained in the proposal package. Failure to complete the proposal forms may result in proposal rejection.

1.27 **VENDOR DEFAULT:** Knox County reserves the right, in case of vendor default, to procure the articles or services from other sources and hold the defaulting vendor responsible for any excess costs occasioned thereby. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidder's list for twenty-four (24) months.

1.28 **VENDOR REGISTRATION:** Prior to the submission deadline for this solicitation, ***ALL PROPOSERS MUST*** be registered with the Procurement Division. If you are not already a registered vendor with Knox County, register on-line at our website at www.knoxcounty.org/procurement and click on "Knox Buys" and then select "Online Vendor Registration." Vendors must be registered with the Procurement Division **prior** to submitting their proposal. Knox County shall not be responsible for technical difficulties experienced by vendors trying to register electronically less than twenty-four (24) hours prior to the proposal closing time.

1.29 **WAIVING OF INFORMALITIES:** Knox County reserves the right to waive minor informalities or technicalities when it is in the best interest of Knox County.

SECTION II OBLIGATIONS, RIGHTS AND REMEDIES

These terms and conditions shall be part of the Contract. Knox County reserves the right to negotiate other terms and conditions it deems appropriate and necessary under the circumstances to protect the public's trust.

2.1 **ALTERATIONS OR AMENDMENTS:** No alterations, amendments, changes, modifications or additions to this Contract shall be binding on Knox County without the prior written approval of the County.

2.2 **APPROPRIATION:** In the event no funds are appropriated by Knox County for the goods or services in any fiscal year, or insufficient funds exist to purchase the goods or services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

2.3 **ASSIGNMENT:** Contractor shall not assign or sub-contract this agreement, its obligations or rights hereunder to any party, company, partnership, incorporation or person without the prior written specific consent of Knox County.

2.4 **BOOKS AND RECORDS:** Vendor shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices at all reasonable times during the Contract period and for five (5) years from the date of the final payment under this agreement for inspection by County or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Vendor's costs of manufacturing, acquiring or delivering the products and services governed by this agreement.

2.5 **CHILD LABOR:** Contractor agrees that no products or services will be provided or performed under this Contract that have been manufactured or assembled by child labor.

2.6 **COMPLIANCE WITH ALL LAWS:** Contractor is assumed to be familiar with and agrees to observe and comply with all Federal, State, and Local laws, statutes, ordinances, and regulations in any manner affecting the provision of goods and/or services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

2.7 **CRIMINAL HISTORY RECORDS CHECK:** Any and all successful proposers, Contractor's employees, Contractor's subcontractors and the employees of any subcontractors must submit to a criminal history records check at the Contractor's expense, conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413. Proposers **must** submit with their proposals the Criminal History Affidavit of Compliance.

2.8 **DEFAULT:** If Contractor fails to perform or comply with any provision of this Contract or the terms or conditions of any documents referenced and made a part hereof, Knox County may terminate this Contract, in whole or in part, and may consider such failure or noncompliance a breach of Contract. Knox County expressly retains all its rights and remedies provided by law in case of such breach, and no action by Knox County shall constitute a waiver of any such rights or remedies. In the event of termination for default, Knox County reserves the right to purchase its requirements elsewhere, with or without competitive solicitation.

2.9 **GOVERNING LAW; VENUE:** This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

2.10 **INCORPORATION:** All specifications, drawings, technical information, Request for Proposal, Proposal, Award and similar items referred to or attached or which are the basis for this Contract are deemed incorporated by reference as if set out fully herein.

2.11 **INDEMNIFICATION—HOLD HARMLESS:** Contractor shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of Contractor, its subcontractors, suppliers, agents or employees.

2.12 **INDEPENDENT CONTRACTOR:** Contractor shall acknowledge that it and its employees serve as independent contractors and that Knox County shall not be responsible for any payment, insurance or incurred liability.

2.13 **INSPECTION AND ACCEPTANCE:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

2.14 **IRAN DIVESTMENT ACT:** By submission of this Request for Proposal response, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

2.15 **LIMITATIONS OF LIABILITY:** In no event shall Knox County be liable for any indirect, incidental, consequential, special or exemplary damages or lost profits, even if Knox County has been advised of the possibility of such damages.

2.16 **NO BOYCOTT OF ISRAEL:** Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the Contract engage in, a boycott of Israel. Proposers must submit with their proposals the completed Iran Divestment Act/No Boycott of Israel Affidavit.

2.17 **NON-DISCRIMINATION AND NON-CONFLICT STATEMENT:** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex **or** national origin any individual trait or characteristic found to be an illegal consideration, shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this agreement or in the employment practices of vendor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination. Contractor covenants that it complies with the Fair Wage and Hour Laws, the National Labor Relations Act, and other Federal and State employment laws as applicable. Contractor covenants that it does not engage in any illegal employment practices.

Contractor covenants that it has no public or private interest and shall not acquire directly or indirectly any interest that would conflict in any manner with the provision of its goods or performance of its services. Contractor warrants that no part of the total Contract amount provided herein shall be paid directly or indirectly to any officer or employee of Knox County as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor or consultant to Contractor in connection with any goods provided or work contemplated or performed relative to the agreement.

2.18 **ORDER OF PRECEDENCE:** In the event of inconsistent or conflicting provision of this Contract and referenced documents, the following descending order of precedence shall prevail: (1) Contract, (2) Request for Proposal, (3) Contractor's Response, (4) Award, (5) Special Terms and Conditions, (6) General Terms and Conditions, (7) Specifications, (8) Drawings.

2.19 **REMEDIES:** Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in Contract and in tort, including but not limited to, rejection of goods, rescission, and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

2.20 **RIGHT TO INSPECT:** Knox County reserves the right to make periodic inspections of the manner and means the service is performed or the goods are supplied and warehoused.

2.21 **SEVERABILITY:** If any provision of this Contract is declared illegal, void or unenforceable, the remaining provisions shall not be affected but shall remain in force and in effect.

2.22 **TAX COMPLIANCE:** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal or proposal and signature, it is current in its respective Federal, State, County, and City taxes of whatever kind or nature, and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Procurement Division.

2.23 **TERMINATION:** County may terminate this agreement with or without cause at anytime. In the event of termination by either party, fees due for services satisfactorily performed or goods accepted prior to the termination date shall be paid. Contractor shall not perform additional work without the expressed permission of County. In the event Contractor intends to interrupt or discontinue service under this Contract, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

2.24 **WARRANTY:** Contractor warrants to Knox County that all items delivered and all services rendered shall conform to the specifications, drawings, solicitation and/or other descriptions furnished and/or incorporated by reference, and will be fit for the particular purpose purchased of merchantable quality, good workmanship, and free from defects. Contractor extends to Knox County all warranties allowed under the U.C.C. Contractor shall provide copies of warranties to the County upon request. Return of merchandise not meeting warranties shall be at contractor's expense.

SECTION III SPECIAL TERMS AND CONDITIONS

3.1 **INTENT:** The intent of this document is to set forth and convey to prospective proposers the general requirements for vendors to provide Knox County Schools with Advanced Academic Programs as desired by Knox County and Knox County Schools (KCS). Award will be based on Best Value. Best value means more than low cost. It includes cost, technical service quality, experience, qualifications and other factors detailed herein.

3.2 **ACCEPTANCE:** Vendors are advised that the payment of an invoice does not necessarily constitute as an acceptance of services that are provided. Acceptance requires a specific written action by Knox County so stating.

3.3 **ADDITIONS OR DELETIONS:** Knox County reserves the right to add or delete services as the need arises. If services are to be added, Knox County and the Contractor will arrive at a mutually agreed price. Any additions or deletions must be approved in writing by Knox County Procurement prior to any changes in service.

3.4 **AWARD LENGTH:** The pricing for this Contract must remain firm for thirty-six (36) months. However, due to the funding source Knox County does not allow automatic renewals, this Contract will need to be extended annually to continue services. Knox County will draft the Extension of Contract and send it to the vendor approximately ninety (90) days before expiration. The agreement may be renewed for two (2) one-year periods upon mutual consent, for a possible total of five (5) years. Following the initial thirty-six (36) months, the Contractor may request a change in price.

3.5 **CHANGES AFTER AWARD:** It is possible that after award, Knox County might change its needs or requirements. Knox County reserves the right to make such changes after consultation with the vendor. Should additional costs arise, Knox County reserves the right to consider accepting these charges provided the vendor can document the increased costs. Knox County also reserves the right to accept proposed service changes from the vendor if they will lower the cost to Knox County and/or provide improved service.

3.6 **COMMUNICATION:** The successful execution of this contract will require extensive communication between all involved parties. While information may be transmitted via telephone, it should always be followed up with an email. It is essential that the Contractor have an efficient email capabilities. The Contractor will be required to submit a list of individuals, along with direct phone numbers, cell phone numbers and email addresses for the agency's contacts. These individuals must be familiar with the Knox County Contract and have authority to make adjustments as requested by Knox County.

3.7 **COMPLIANCE WITH ALL APPLICABLE REGULATIONS:** Vendor agrees and covenants that the company, its agents and employees will comply with all City, County, State and Federal codes, laws, rules and regulations applicable to the business to be conducted under this contract. If the vendor performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, the vendor shall bear all costs arising from such work.

3.8 **CONTACT PERSONNEL:** Essential to the success of this Contract is the development of a good working relationship between the vendor and Knox County. It is imperative that the Knox County account be handled efficiently and professionally. Knox County should be assigned no more than two (2) vendor contacts to handle billing inquiries and service related issues. In the event on or both contacts leave the Knox County account, the vendor shall formally introduce the new contacts to Knox County personnel. These contacts must be knowledgeable of the County's account to avoid an interruption of service.

3.9 **CONTRACT EXECUTION:** The award of this proposal may result in a Contract between Knox County and the successful vendor(s). The Contract may require Knox County Board of Education and/or Knox County Commission approval. The successful vendor(s) may be required to be present at the Board of Education and/or County Commission meeting(s) to answer questions relating to the service to be performed. Adequate notification will be given by Knox County Procurement Division if the awarded vendor(s) will need to attend meetings. There shall be no cost to Knox County for attendance of the vendor(s). Knox County will draft the Contract. The Knox County Procurement Division will not accept any vendor's contract. A sample contract is under Exhibit B for review. If Master Agreements, Service Agreements, Terms and Conditions or other contract agreements are submitted they will not be accepted.

3.10 **CONTRACTOR DUTIES:** At the Contractor's own expense, the Contractor shall:

3.10.1 Provide competent supervision;
3.10.2 Provide competent personnel;
3.10.3 Take precautions necessary to protect persons or property against injury or damage and be responsible for any such damage or injury that occurs as a result of their fault or negligence.

3.11 **DESTINATION AND DELIVERY:** All shipments that are to be delivered must be Free on Board Destination to the department ordering the items. All shipping charges are to be included in the unit price of each item. All deliveries must be unloaded and delivered inside to the department location that is ordering the items.

3.12 **EVALUATION CRITERIA:** This proposal will be evaluated using the following criteria:

As per Section 1.5, Knox County will determine the award structure that is in its best interest.

Methodology	30 Points
Delivery of Service	30 Points
Experience & References	20 Points
Cost	20 Points

Knox County may select an Evaluation Committee for this solicitation to thoroughly review and score all submitted responsive and responsible proposals. Each evaluator will have the ability to award up to one hundred (100) points, based on the Evaluation Criteria, per submission.

3.13 **EVALUATION REVIEW:** Knox County reserves the right to use all pertinent information (including information learned from sources other than disclosed in the Request for Proposal process) that might affect the County's judgment as to the appropriateness of an award to the best evaluated vendor(s). This information may be appended to the proposal evaluation process results. Information on a service provider from reliable sources, and not within the service provider's proposal, may also be noted and made part of the evaluation file. Knox County shall have sole responsibility for determining a reliable source. Knox County reserves the right to conduct written and/or oral discussions/interviews after the proposal closing. The purpose of such discussions/interviews is to provide clarification and/or additional information to make an award that is in the best interest of Knox County.

3.14 **EXCEPTIONS TO SPECIFICATIONS:** Vendors taking exception to any part or section of these specifications shall indicate such exceptions on their submittal. A failure to indicate any exception(s) shall be interpreted as the vendor's intent to fully comply with the specifications as written. Conditional or qualified offer are subject to rejection in whole or in part. Any exceptions shall be included in Section V, Tab VIII of the submittal. **Do not strike through or in any other way alter the Request for Proposal. Exceptions listed within other sections of the submittal shall not be reviewed or considered.**

3.15 **GRANT FUNDING:** The products or services being procured under this solicitation are being funded by Federal Grant money. All awarded vendors will be required to adhere to Exhibit A of this solicitation in the performance of the Contract.

3.16 **GRATUITIES AND KICKBACKS:** It shall be a breach of ethical standards for any person or company to offer, give, or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim, or controversy or other particular matter, pertaining to any program requirement of a contract or subcontract or to any solicitation or proposal therefore. It shall be a breach of ethical standards for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or a person associated therewith, as an inducement for the award of a subcontract or order. Breach of the provisions of this paragraph is, in addition to a breach of this Contract, a breach of ethical standards which may result in civil or criminal sanction and/or debarment or suspension from being a contractor or subcontractor under Knox County contracts.

3.17 **IDENTIFICATION:** Employees of the Contractor shall have proper photo identification displayed at all times while on property belonging to Knox County.

3.18 **INSURANCE:** The successful vendor(s) must carry the insurance as indicated on the Insurance Checklist Attachment hereto. As proof of the vendor's willingness to obtain and maintain the insurance, the vendor must complete, sign and have its insurance agent sign the attachment and submit it with the proposal. Upon the Notification of Intent to Award, the successful vendor will be required to submit a Certificate of Insurance (COI) including any corresponding endorsement page(s) with the specified coverage and listing Knox County as an additional insured. It shall be the successful vendor's responsibility to keep a current COI and endorsement page(s) on file with Knox County Procurement for as long as the contract is in effect.

3.19 **INTERPRETATION:** No oral interpretation will be made to any vendor regarding the meaning of specifications or the Scope of Work. All questions are to be submitted in writing via email and will be answered in the form of an addendum to the solicitation by the Knox County Procurement Division, if applicable.

3.20 **INVOICE DETAIL:** Knox County is requesting invoices to show the following detail to help expedite review and payment. The Contractor(s) may be required to modify invoicing procedures to show the detail. All potential Contractors are hereby cautioned that Knox County will only pay from original invoices and not facsimiles or copies. Invoices which do not adhere to these details may be returned to the Contractor for correction.

3.20.1 The invoice must show the amount due to the Contractor by Knox County;
3.20.2 The invoice must show a summary of completed work;
3.20.3 Invoices are to be original and uniquely pre-numbered;
3.20.4 Invoices which do not show this information are subject to rejection.

3.21 **INVOICING PROCEDURES:** Knox County requests that invoices be easy to read and understand. Invoices are to be original and uniquely pre-numbered. There shall be no additional charge for this information and these procedures to be included. Each invoice shall include a summary of service(s) provided and shall list the associated unit price. Supporting documentation shall be included with invoices as applicable. Invoices without this information will be returned to the Contractor for correction.

Invoices shall be sent to the billing address indicated on the Purchase Order. Each department or division of Knox County is responsible for its own budget. Departments cannot charge or pay bills for another department. Therefore, it is critical that the successful Contractor's invoices specify the correct department. Do not credit payments to another department's account. Invoices must be submitted in triplicate and must match the corresponding Purchase Order number. There shall be no component billing. Mail invoices for Knox County Schools to:

Knox County Schools Finance Department
Post Office Box 2188
Knoxville, TN 37902-1805
invoices@knoxschools.org

3.22 **INVOICE REVIEW:** Knox County shall review all invoices for adherence to the terms and conditions of the Contract. Variations from the Contract and Contract pricing are strictly prohibited. Any variance found on the invoice will result in rejection of that invoice. Rejected invoices will be returned to the Contractor(s) for correction. Repeated variations may result in termination.

3.23 MINIMUM QUALIFICATION EXPECTATIONS:

3.23.1 Respondent must address all submittal requirements as defined under Section IV.

3.23.2 Respondent shall have a minimum of five (5) years of experience and sufficient capabilities to carry out the work contemplated, as well as the equipment and personnel available for the work.

3.23.3 If the respondent has a permanent office in Knox County, respondent must have a current business license issued by Knox County.

This requirement also applies to any of the Respondent's proposed subcontractors or subconsultants with a permanent office in Knox County. A Knox County business license is not required of any Respondent or proposed subcontractor or subconsultant who does not have a permanent office in Knox County. For more information, contact the Knox County Clerk's office at 865.215.2392.

3.24 NEGOTIATION: Knox County may select a successful proposer on the basis of initial offers received without discussions. Therefore, each proposal shall contain the proposer's best terms from a cost or price and service standpoint. Knox County reserves the right to enter into Contract negotiations with the highest-rated proposer. If Knox County and the selected proposer cannot negotiate a successful agreement, Knox County may terminate said negotiations and begin negotiations with the next highest-rated proposer. Knox County retains the right to negotiate with multiple proposers simultaneously. This process will continue until an agreement has been reached or all proposers have been rejected. No proposer shall have any rights against Knox County arising from such negotiations.

3.25 NEWS RELEASES BY VENDORS: As a matter of policy, Knox County does not endorse the services of a Contractor. A Contractor will not make news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County.

3.26 NO CONTACT POLICY: After the date and time that the vendor receives this solicitation, any contact initiated by any proposer with any Knox County representative, other than the Procurement Division representative listed herein, concerning this Request for Proposal, is strictly prohibited. Any such unauthorized contact may cause the disqualification of the proposer from this procurement transaction.

3.27 OFFER WITHDRAWAL: No proposal can be withdrawn after it is filed unless the proposer makes a request in writing to the Knox County Procurement Division prior to the time set for the closing of proposals or unless the County fails to accept within one hundred twenty (120) business days after the date fixed for the closing the Request for Proposal.

3.28 ORAL PRESENTATION/INTERVIEW: Knox County may require proposers to give oral presentations/interviews in support of their proposal or to exhibit or otherwise demonstrate the information contained therein. These presentations/interviews may be conducted virtually through video conferencing or in person.

Knox County reserves the right to request oral presentations and/or interviews during the initial evaluation phase. The County also reserves the right to complete the initial evaluation phase and then request oral presentations and/or interviews from all proposers or the highest rated proposers. In this case, the evaluations may be revised based on additional information received during presentations.

3.29 PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of thirty-six (36) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

3.30 **PROPOSAL CONTENT:** The proposer's response must contain a thorough description of the background of the proposer and sufficient evidence showing that the proposer is capable of providing the services. The proposer's response must thoroughly expound on the proposer's understanding of how the proposed services will meet Knox County's needs. The proposal must also contain an explanation of the implementation plan and the proposer's ongoing commitment to service.

3.31 **PROPOSAL EVALUATION:** In evaluation of submitted proposals, Knox County reserves the right to use any or all of the ideas from the proposals submitted without limitation and to accept any part or the entire successful proposal in selecting an operation which is judged to be in the best interest of Knox County. All material submitted becomes property of Knox County.

3.32 **PROPOSAL FORMAT:** This solicitation is in the Request for Proposal format. As the specified date and time, each proposer's name will be publicly read aloud. No further information will be given at that time. Evaluation of the proposals will proceed as expeditiously as possible and successful, as well as unsuccessful, notification will be given.

3.33 **PROPOSER OBLIGATION:** Proposers shall become fully acquainted with conditions relating to the scope of the work detailed in this Request for Proposal. Failure to become acquainted with the existing conditions shall in no way absolve the proposer of any obligations with respect to this Request for Proposal or the Contract.

3.34 **PUBLIC RECORDS ACT:** Knox County is subject to the Tennessee Open Records Act 10-7-503 et seq. Proposers are cautioned that all documents submitted on behalf of this Request for Proposal shall be open to the public for viewing and inspection.

3.35 **QUANTITIES:** Knox County does not guarantee any quantity of services will be utilized under this solicitation. Services will be utilized on an as needed basis.

3.36 **REJECTION OF PROPOSALS:** Knox County reserves the right to reject any and all proposals received as a result of this request and to waive any informality, technical defect or clerical error in any proposal, as the interests of Knox County may require. Non-acceptance of any proposal will be devoid of any criticism of the proposal and of any implication that the proposal is deficient in any manner. Non-acceptance of any proposal shall be construed as meaning simply that the County does not deem the proposal acceptable or that another proposal was deemed more advantageous to Knox County for the particular services proposed.

3.37 **REMOVAL OF CONTRACTOR'S EMPLOYEES:** Contractor agrees to utilize only experienced, responsible and capable people in the performance of the work. Knox County may require that the Contractor remove from the job covered by this Contract, including employees who endanger persons or property or whose continued employment under this Contract is inconsistent with the interest of Knox County.

3.38 **SUBMIT QUESTIONS:** Prospective proposers may submit questions concerning this solicitation until **September 26, 2025 at 4:30 p.m. local time**.

3.39 **SUSPENSION AND DEBARMENT:** Vendor will notify Knox County Government if they become suspended, debarred, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities during the term of this proposal and during the term of any subsequent Contract for service.

3.40 **TENNESSEE REGISTRATION:** The successful proposer must meet any applicable State of Tennessee registration requirements.

SECTION IV SCOPE OF WORK

4.1 **BACKGROUND:** Knox County Schools (KCS) is a public education agency. It is responsible for the education of children from preschool through high school. There are approximately fifty-nine thousand (59,000) Pre-K through 12th-grade students and approximately seven thousand eight hundred (7,800) employees. For purposes related to this RFP, the district is comprised of ninety-two (92) schools that represent urban, suburban, and rural populations.

4.2 **FACILITIES & EQUIPMENT:** All facilities for training in Knoxville, TN will be provided by Knox County Schools. Upon request, Knox County will provide a computer and projection system, with accommodations for trainers to use their own computers.

4.2 **PARTICIPANTS:** The number of participants may vary. Vendors may work with an entire school/department staff, smaller school content teams and/or district teams, individuals, or any combination thereof. A defined number of training sessions or participants is not guaranteed. Participants will be staff members serving our students.

4.3 **PROGRAM CONTENT & METHODOLOGY:** Knox County Schools is seeking vendors to partner with our schools and district to provide high quality, rigorous academic programming for 9th through 12th grades which prepares our students to be successful in their next phase of life. The program must promote academic excellence and equity in the Early Postsecondary Opportunities, (EPSO), as listed on the Tennessee Department of Education website and listed in the Ready Graduate and/or College and Career Readiness accountability indicator.

More information on EPSO can be found at the following link: https://www.tn.gov/education/students/early-postsecondary.html

The Advanced Academics organization should provide a comprehensive program to include courses/curricular frameworks, assessments, services and supports that provide opportunities for students to demonstrate college and career readiness and have the potential to earn postsecondary credit. The curricular program should be of high-quality which includes discipline specific critical thinking, inquiry, reasoning and communication skills. The programming of the courses should support and encourage learner potential by challenging students to inquire skillfully, think critically, and reflect meaningfully. Students should have the opportunity to engage in learning across all content areas with an informed curiosity that will equip students to be successful in their future endeavors. These areas must be inclusive of, but not limited to: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education Fields, and Sciences. Programs must also offer courses individually and as a full diploma package. Upon completion of the learning, students should have the opportunity to demonstrate their mastery with a rigorous assessment that could culminate in credit through academically competitive colleges and universities.

The program must have or be actively in the process of developing a clear scope and sequence of support through its framework for instruction for students and teachers to identify and prepare students with potential in earlier grades (prior to the 9th grade), so schools can increase the percentage of KCS students in advanced coursework. Proposers must provide a comprehensive narrative statement detailing the scope and sequence of support utilized. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.

The program additionally should include services and supports for school and district staff that will prepare them to facilitate student progress in the program. Professional learning and training should include teachers as well as other staff members and administrators for schools and the district. The vendor must provide sustainable professional development through in-person trainings, with options for virtual meetings/trainings or video resources. There should also be teacher support materials provided digitally and/or in person which support the academic rigor of the program.

4.5 **DELIVERY OF SERVICE:** Proposers must provide comprehensive narrative statements that outline the implementation plan for their program. The implementation plan should clearly support, streamline and provide accountability for the identified deliverables. This plan may include operational recommendations for KCS that will improve the efficiency and efficacy of the program.

The program deliverables include:

- Supports for student content and skill development beginning minimally in the 9th grade.
- Alignment with Early Postsecondary Opportunities (EPSO).
- Opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit through both individual and full diploma package courses with rigorous assessments that may culminate in postsecondary credit, aligning with university admissions guidelines;
- Courses/curricular frameworks for multiple content areas including Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences with discipline specific critical thinking, inquiry, reasoning and communication skills.
- A scope and sequence of support, either in place or in development, utilized to identify student potential prior to the 9th grade that can increase the percentage of students in underserved populations in advanced coursework.
- Services and supports that prepare school and district staff to facilitate student progress in the program through in-person trainings with options for virtual meetings/training and video resources.

- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

4.6 **EXPERIENCE:** Proposers are to detail their organization's previous experience working with schools, districts, states, and/or countries to promote high levels of academic rigor for all learners which results in the opportunity to earn postsecondary credit. For applicable team members, proposers are to submit education credentials and relevant work experience that supports the program sought by this RFP. This information is to be submitted in Section V, Tab V of the Proposal.

Proposers must provide three (3) references relating to work of a similar scope completed within the last five (5) years. Include the name of the agency or institution, point of contact with both a telephone number and email address, and the nature and size of the Contract. **Do not list Knox County Government or Knox County Schools as a reference.** References shall be submitted on Attachment B of this RFP.

SECTION V PROPOSAL FORMAT

PROPOSAL INFORMATION: The following guidelines should be followed when responding to the Request for Proposal. Negligence in adhering to the criteria listed below will be considered when reviewing the responses and evaluating the proposers. Knox County reserves the right to reject any proposal for failure to comply with the requested response specifications. The County reserve the right to amend the Request for Proposal by addendum prior to the final date of proposal submission.

- Knox County requests proposals be in sufficient detail to address all requirements.
- The County requests responses be submitted in a three-ring binder containing sections separated by tabs. Do not submit spiral bound or glued responses.
- Please submit one (1) marked original and one (1) exact copy.
- Page numbers should be placed on the bottom center of pages.
- Proposers shall also submit an exact copy of the original proposal on a Flash drive. **This shall be in one (1) complete pdf file. Do not include multiple folders on the Flash drive.**

PROPOSERS MUST HAVE THEIR BINDERS IN THE EXACT FORMAT LISTED BELOW.
Each proposal must address all questions/statements listed in each tab completely.

TAB I COVER LETTER

Include cover letter authorizing the submission of the proposal signed by the principal of the company.

TAB II COMPANY PROFILE

- Company Name, Address Telephone/Fax numbers
- Contact name(s) and information
- Proposer's Vendor Number as assigned by Knox County
- Employer Identification Number (EIN)
- Knox County Business Tax License for Organization (if applicable)
- Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)
- Will you accept E-commerce for payment as detailed in Section 1.14?
- Acknowledgement of the receipt of any Addendum issued

TAB III PROGRAM CONTENT & METHODOLOGY (30 Points)

Proposers must demonstrate an understanding of Knox County's needs and fully explain their overall approach to meet the County's requirements. This must thoroughly describe how the proposed services will meet the requirements outlined in Section 4.4. Proposer must clearly address the following:

- Describe how the program aligns with Early Postsecondary Opportunities (EPSO).
- Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit.
- Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills.
- Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered.
- Describe the courses that are offered individually as well as those that are offered as a full diploma package.
- Outline the assessment process(es) and opportunities to earn college/university credit.
- Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.
- Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program
  - Detail the professional development models available and teacher support materials associated with the program.
- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

TAB IV **DELIVERY OF SERVICES (30 POINTS)**

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule.

- Courses/curricular frameworks for multiple content areas;
- Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines;
- Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;
- Training and/or professional learning offerings about the services and supports included in the program; and
- Supports for student content and skill development beginning minimally in the 9th grade.
- Proposers do not have to provide complete curriculum. Samples are sufficient.

TAB V **EXPERIENCE AND REFERENCES (20 Points)**

Proposers are to detail the Company's experience relating to the services requested in this RFP, specifically:

- Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s).
- Proposers must describe the organization's experience with similar projects.
- Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP. Information about each person listed should include their a) title b) resume, including advanced education credentials, relevant work experience, demonstrated outcomes, independent research, and publishing in the subject areas addressed by this RFP, as applicable c) number of years with the organization and d) description of the type of work the individual will perform
- References (Attachment B)

TAB VI **PROPOSED COSTS (20 Points)**

Costs proposals must include all direct and indirect costs associated with the performance of the service. Proposed costs should be inclusive of all expenses. Proposer may include the methodology used to determine their proposed cost. Pricing must include all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. There will be no reimbursement for any such charges.

Per Attachment A, please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- Annual Candidacy/Membership Fees
- School Application Fees
- Annual Program or Curriculum Fees
- Curricular Materials
- Exam Fees
- Professional Development (inclusive of materials and travel expenses, as applicable)
  - o On-Site Format
  - o Webinar/Virtual Format
- Other Expenses
- Optional Features/Add-Ons

NOTE: This tab shall only be included in the original document and the exact electronic version. This tab is to be submitted under separate cover from the other parts of the vendor's proposal. This tab will be reviewed after the other sections of the vendor's proposal have been reviewed and scored.

TAB VII **OTHER INFORMATION**

Proposers may include any other information deemed pertinent to this solicitation.

TAB VIII **EXCEPTIONS**

Please note any and all exceptions taken to any part this Request for Proposal. If none are taken, please clearly state so. Do not mark through or otherwise alter the language of this RFP in your response.

TAB IX **ATTACHMENTS**

- Pricing (Attachment A)
- Insurance Checklist (Attachment C)
- Criminal History Check Affidavit (Attachment D)
- Iran Divestment Act (Attachment E)
- General Federal Funding Requirements (Exhibit A)

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$_____per school Notes:
Application Fees	$_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes:
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students:
Exam Fees	$_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site • Webinar/Virtual
Other Expenses:	
Optional Features/Add-ons:	

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: _____

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident) $1,000,000 BODY INJURY (Per–Person) BODY INJURY (Per-Accident) PROPERTY DAMAGE (Per-Accident
YES	4.	COMMERCIAL GENERAL LIABILITY	LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE $ 1,000,000
			FIRE LEGAL LIABILITY $ 100,000
			MED EXP (Per person) $ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY $ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE $ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE $ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2.000.000 ANNUAL AGGREGATE
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000
NO		PROFESSIONAL LIABILITY	
NO NO NO NO	10.	ARCHITECTS &ENGINEERS ASBESTOS & REMOVAL LIABILITY MEDICAL MALPRACTICE MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM $2,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)
NO	13.	MOTOR CARGO INSURANCE	
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$
NO	17.	DISHONESTY BOND	$
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.
NO	19.	USL&H	FEDERAL STATUTORY LIMITS

20. Carrier rating shall be Best's Rating of A-VII or better or its equivalent.

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.

23. Certificate of Insurance shall show the RFP number and title.

Insurance Agent's Statement and certification: I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.

Agency Name: _____Authorizing Signature: _____

Proposer's Statement and Certification: If awarded the Contract, I will comply with the Contract insurance requirements.

Proposer's Name: _____Authorizing Signature: _____

ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, _____, president or other principal

Officer of _____, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

_____
President or Principal Officer

For: _____
Name of Company

STATE OF TENNESSEE}
COUNTY OF }

Subscribed and sworn before me by _____,

President or principal officer of _____,

On this _____ day of _____ 2_____.

_____
Notary Public

My Commission expires: _____

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying,'' in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

OFFICE OF COUNTY MAYOR GLENN JACOBS

Procurement Division, 1000 N. Central Street, Suite 100, Knoxville, TN 37917

ADDENDUM I
REQUEST FOR PROPOSAL 3688
ADVANCED ACADEMIC PROGRAMS

ADDENDUM DATE: September 30, 2025

BUYER: Jay Garrison, CPPO, CPPB

ORIGINAL CLOSING DATE: October 14, 2025 at 2:00 PM

THE FOLLOWING IS TO BE AMENDED:

ATTACHMENT A, COST, WILL BE DELETED AND REPLACED WITH A NEW COST SHEET. SEE ATTACHED. FAILURE TO PROVIDE THE REVISED COST SHEET AND ALL REQUIRED ITEMS WILL BE JUST CAUSE TO DEEM YOUR SUBMITTAL AS NONRESPONSIVE.

SECTION 3.4 SHALL BE AMENDED TO THE FOLLOWING:

AWARD LENGTH: Knox County intends to issue a one (1) year award with an option to renew upon consent of both Knox County and the awarded Contractor. This term bid agreement may be renewed for an additional four (4) years, one (1) year at a time for a possible total of five (5) years. Knox County reserves the right to revoke the award if a pattern of unavailability arises with the successful proposer(s).

SECTION 3.29 SHALL BE AMENDED TO THE FOLLOWING:

PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of twelve (12) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

THE FOLLOWING IS FOR CLARIFICATION:

QUESTION 1: Could you please clarify whether the accrediting organization that issues any certifications to students must be Tennessee-based, or if national accreditation is acceptable?

ANSWER 1: National accreditation is acceptable.

QUESTION 2: We understand that Knox County intends to draft the contract. As a global provider of specialist exam services, we typically begin with a bespoke contract template that includes essential terms specific to our services—such as exam security protocols—which may not be covered in a standard agreement. This template has been successfully used as a starting point with many U.S. districts. For efficiency during the contracting phase, would Knox County be amenable to reviewing and potentially using our template as the basis for the agreement?

ANSWER 2: The County's Contract will take precedence over all other Contract documents. Proposers may submit a separate document with other terms and conditions, however, conflicting terms and conditions between the County's Contract and any other agreement will be governed by the County's Contract.

QUESTION 3: The RFP references Exhibit B as a sample contract, but it appears to be missing from the document. Could you kindly provide a copy?

ANSWER 3: See attached.

QUESTION 4: The RFP requests fixed pricing for the initial 36-month term. We typically offer fixed pricing with an annual inflationary adjustment. Could you advise on how Knox County would prefer suppliers to address inflationary increases in their proposals?

ANSWER 4: Knox County is amending this requirement to require fixed pricing for a period of 12 months from the date of contract commencement. No cost increases will be granted during any term of the contract.

QUESTION 5: Could you please clarify what is meant by "unit price" in this context? Is it intended to refer to pricing per student, per exam, per school, or another metric?

ANSWER 5: This requirement has been amended per the revised Cost sheet. See attached.

QUESTION 6: We have reviewed the Appendix C insurance requirements. Because we are an entity headquartered in the UK, we may not be able to comply with all of these requirements. Where we may need derogations e.g. it may not be possible to name you as an additional insured, how should we indicate this?

ANSWER 6: This requirement cannot be waived. The County must be named additionally insured on the policy. Upon a notice of award to a proposer(s), the successful proposer(s) will be required to submit a current Certificate of Insurance along with all endorsement pages naming Knox County as additionally insured.

QUESTION 7: Do you want us to list all the AP courses that Knox has currently bought from us?

ANSWER 7: No. This is a new, standalone solicitation and previous experience with Knox County will not be considered.

QUESTION 8: In regards to samples, we were going to send one copy of each course student edition. Do you require digital access as well?

ANSWER 8: Digital access is not required, but acceptable.

QUESTION 9: Would the district consider an all-digital platform to fulfill this RFP's scope of work?

ANSWER 9: No. The County will not accept an all-digital platform.

QUESTION 10: Can the curriculum be supplemental to the courses or must it be core curriculum?

ANSWER 10: The curriculum can be supplemental.

End of addendum.

Jay Garrison, CPPO, CPPB
Procurement Coordinator

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost.
- Digital resources that the teachers and/or students would need to fully implement the program.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost).
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost).
- Software Services

Total cost for the scenario: $_____

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

Exhibit B

Knox County Government

and

(Contractor)

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and (Contractor), hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. Terms of this Contract. This Contract commences on the 1st day of December 2025 and ends the 30th day of November 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. The County intends to issue a one-year (1) award. Upon the mutual agreement of the vendor and the County, the award may be extended for four (4) additional years, one (1) year at a time. This may result in a total of five (5) years. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. Subcontracting/partnerships: Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. Payment. Contractor warrants that the pricing shall remain firm for the initial one (1) year period. At the end of the first one (1) year period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a

SAMPLE

Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. Right to inspect. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. Nondiscrimination and non-conflict statements. Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. Books and records. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding

of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the

SAMPLE

Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, Terms and Conditions, etc., for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____

BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**

MAYOR – Signature **MAYOR**

Date:_____

SAMPLE

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO._____
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

_____
LAW DIRECTOR – Signature

_____
LAW DIRECTOR – Printed Name

Date:_____

CONTRACTOR

_____
AUTHORIZED SIGNATURE

_____
CONTRACTOR – Printed Name

(CONTRACTOR)
COMPANY NAME

Date:_____

SAMPLE

International Baccalaureate®
Baccalauréat International
Bachillerato Internacional

The State of Tennessee Request for Proposals (RFP) Application



International Baccalaureate®
Baccalauréat International
Bachillerato Internacional

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COVER LETTER

Authorizing Submission of the Proposal: Letter must be signed by the principal of the company. Please sign the original in blue ink.

International Baccalaureate
Baccalauréat International
Bachillerato Internacional

Authorization Letter for Submission of International Baccalaureate Proposal

Date: October 9, 2025
To: Procurement Division, Knox County, Tennessee
From: Matt Costello, Chief Business Development Officer, International Baccalaureate
Subject: Authorization to Submit Proposal

This letter serves as official authorization for the International Baccalaureate (IB) to submit a proposal for the provision of Advanced Academic Programs in Knox County, Tennessee, as outlined in the RFP Proposal number 3688, with a deadline of October 14, 2025.

We have carefully reviewed the RFP and are confident that our comprehensive program, experienced team, and proven track record of success make us the ideal choice for this project. Our proposal details our program offerings, implementation plan, professional development opportunities for educators, and supports for student content and skill development.

We understand the importance of this program to the students and community of Knox County and are committed to providing a high quality, rigorous, and internationally recognized educational experience that will empower your students to become college ready individuals who are prepared to thrive in a complex and interconnected world.

We have carefully reviewed the terms and conditions outlined in the RFP document and confirm our acceptance of them by submitting this signed letter. We welcome the opportunity to discuss our proposal further and answer any questions you may have.

Sincerely,

Matt Costello

Matt Costello
Chief Business Development Officer
International Baccalaureate

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Washington, DC 20016
United States

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International Baccalaureate Organization 2018
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COMPANY PROFILE

Company Name, Address, and Telephone Number(s)

International Baccalaureate Organization
3950 Wisconsin Avenue NW
Washington, DC 20016
1 301-202-3000

Primary Contact Person's Name, Email Address and Telephone Number(s)

Robert Kelty
Head of Development, Outreach and Government Relations
Robert.Kelty@ibo.org
1.202.937.8582

Vendor Number as assigned by Knox County

Vendor Number: 57043

Employer Identification Number (EIN)

30-0388800

Knox County Business Tax License for Organization (if applicable)

Not applicable

Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)

(if entity is located outside of Tennessee)
Submitted on January 30, 2024
Approved on February 5, 2024: Control Number: 1508491

Will you accept E-commerce for payment detailed in Section 1.14

The IB is not able to accept E-commerce.

Acknowledgment of any addenda issued by Knox County Procurement

PROGRAM CONTENT & METHODOLOGY

Proposers must demonstrate an understanding of Knox County's needs and fully explain their overall approach to meet the County's requirements. This must thoroughly describe how the proposed services will meet the requirements outlined in Section 4.4.

Proposer is to describe, in detail, the totality of their program, including excerpts and/or examples of courses/curricular frameworks and materials used, description(s) of the rigorous assessments that culminate in postsecondary credit, and samples of the professional learning/training that will be provided to school and system leaders, teachers, counselors and program coordinators to support the program.

IB Program Description

The International Baccalaureate (IB) is a non-profit foundation headquartered in Geneva, Switzerland, that offers a continuum of four educational programs for students aged 3 to 19. With roots dating back to 1924 at the International School of Geneva, and subsequently founded as an independent non-profit in 1968, the IB's mission is to develop inquiring, knowledgeable, and caring young people who help create a better and more peaceful world through intercultural understanding and respect.

These programs encourage students worldwide to become active, compassionate, and lifelong learners who understand that people with their differences can also be right.

At the heart of all our programs is the IB Learner Profile, a long-term, holistic vision of education that underpins the IB continuum and puts the student at the center of everything we do. The Learner Profile is the IB mission statement in action, providing a set of learning behaviors that aims to inspire, motivate, and focus students, teachers, and the entire IB World School community, uniting them in a common purpose. To complement the Learner Profile are the Approaches to Learning – key skills such as Research, Communication, Self-Management, Social, and Thinking Skills – that serve as the foundation of all IB programming.

What Makes IB Programmes Unique?

Embracing Global Perspectives While Rooted in National Identities

Our commitment to international education begins with the belief that the only way to appreciate someone else's culture is to be confident in your own. This concept is rooted in what we call "international mindedness," a concept that encourages individuals to recognize their common humanity, shared stewardship of resources, and their responsibility to create a better and more peaceful world. International mindedness involves developing a deep understanding of different cultures, perspectives, and worldviews, while also appreciating and affirming one's own cultural heritage and identity.

The international mindedness that permeates our programs is more than simply learning an additional language, which is a key aspect of all our programs. For example, in biology, students might learn about typhoid bacteria but also their impact on life expectancy in a developing country. Students learning about the history of their town or region may examine the broader context of history and the effects of specific global events.

International mindedness is a multifaceted concept that captures a way of thinking, being, and acting characterized by an openness to the world and a recognition of our deep interconnectedness with others. To be open to the world, we need to understand it. IB programs, therefore, provide students with opportunities for sustained inquiry into a range of local and global issues and ideas. This willingness to see beyond immediate situations and boundaries is essential as the global economy and emerging technologies, such as artificial intelligence, continue to blur traditional distinctions between the local, national, and international levels. An IB education fosters international mindedness by helping students reflect on their own perspective, culture, and identities, as well as those of others. By engaging with diverse beliefs, values, and experiences, and by learning to think and collaborate across cultures and disciplines, IB learners gain the understanding necessary to make progress towards a more peaceful world.

The IB further enhances the development of international mindedness through multilingualism. All IB programs require students to study, or study in, more than one language. This is because

we believe that communicating in more than one language helps students appreciate that their own language, culture, and worldview are just one of many. In this way, it provides excellent opportunities to develop intercultural understanding and respect. Additionally, decades of peer-reviewed research reinforce the benefits of bilingualism for students. Bilingual education offers cognitive benefits, such as enhanced problem-solving skills and greater cognitive flexibility, while also providing practical advantages, including improved career opportunities and heightened cultural awareness in an increasingly interconnected world.

IB Learning Across Programs

The IB integrates deep and rigorous learning across all its four programs, fostering communication, critical thinking, research, skill application to real-world problems, and intercultural understanding. Here's an overview of IB programmes alongside the language components offered with samples for each grade band.

Primary Years Programme (PYP): The International Baccalaureate (IB) PYP is an educational framework for students aged **3 to 12**. Unlike the MYP or DP, it is not a program with set courses and external exams but a curriculum organizer and philosophy that guides the entire school's approach to learning.

Core Philosophy

The PYP is a transdisciplinary, inquiry-based, and student-centered approach. It focuses on the development of the "whole child" — intellectually, personally, emotionally, and socially. A central principle is student agency, where students are viewed as agents of their own learning, with a voice, a choice, and ownership over their education.

Key Components – Primary Years Programme (PYP)

- Transdisciplinary Themes: Learning is organized around six universal themes of global significance, which transcend traditional subject boundaries. These themes provide the framework for units of inquiry and include:
    - Who we are
    - Where we are in place and time
    - How we express ourselves
    - How the world works
    - How we organize ourselves
    - Sharing the planet
- Key Concepts: The program is driven by key concepts that give inquiries direction and meaning. These concepts, such as Form, Function, Causation, Change, Connection, Perspective, and Responsibility, help students develop a deeper, more transferable understanding of topics.
- Subject Areas: While the learning is transdisciplinary, it is supported by six traditional subject areas: Language, Social Studies, Mathematics, Science, Arts, and Personal, Social and Physical Education.
- The Learner Profile: A core set of 10 attributes that all IB programs aim to develop in students, including being an inquirer, a thinker, a communicator, and principled.
- Action: The PYP encourages students to take action as a result of their learning. This can be as simple as making a new choice or as complex as a community service project, demonstrating that learning is connected to life and social responsibility.

- The PYP Exhibition: In their final year of the PYP (usually Grade 5), students collaborate on a whole-class project. This culminating activity challenges them to apply their knowledge and skills to a real-world issue and present their findings and proposed solutions.

Language Learning in the PYP

- Focus: Developing early language skills and literacy through play-based activities and exploration across various languages.
- Sample: In a PYP unit on "Families," students might learn basic greetings in different languages, sing songs, and write simple stories about their families.

Middle Years Programme (MYP): The International Baccalaureate (IB) Middle Years Programme (MYP) is a curriculum framework designed for students aged **11 to 16**. It serves as a bridge between the inquiry-based learning of the IB Primary Years Programme (PYP) and the academic rigor of the IB Diploma Programme (DP) and Career-related Programme (CP). The MYP is not a set of specific courses but rather a flexible framework that can be integrated with national or local curricula.

Key Components

The MYP is built on several core principles and components:

- Broad and Balanced Curriculum: Students are required to study a broad range of subjects across eight groups: Language and Literature, Language Acquisition, Individuals and Societies, Sciences, Mathematics, Arts, Physical and Health Education, and Design. Students must have at least 50 hours of instruction in each subject group per year.
- Interdisciplinary Learning: The program encourages students to make connections between their subjects and the real world. This is achieved through a focus on Global Contexts (such as "identities and relationships" and "globalization and sustainability") and through interdisciplinary units where teachers from different subjects collaborate.
- Approaches to Learning (ATL): A central tenet of the MYP is teaching students *how to learn*. The ATL skills, which include communication, research, thinking, social, and self-management skills, are explicitly taught and applied across all subject areas.
- Service as Action: Students are empowered to apply what they learn in the classroom to make a positive impact in their community. This component encourages students to become responsible and caring global citizens.
- Projects: Students engage in long-term, self-directed projects:
    - Community Project: Students in grades 8-9 (MYP Years 3-4) complete this project, which focuses on community service.
    - Personal Project: Students in the final year of the MYP (Year 5) undertake an independent, creative project on a topic of their choice. This project is a summative review of their learning and their ATL skills.
- Assessment: The MYP uses a criterion-based assessment model, meaning students are assessed on what they can do rather than being ranked against their peers. In the final year, students have the option to take external, on-screen e-assessments that can lead to an official IB MYP Certificate.

The MYP aims to prepare students for academic success, future careers, and a lifetime of learning by fostering intellectual curiosity, critical thinking, and a holistic approach to their personal and social development.

Language Learning in the MYP

- Focus: Expanded skills promoting intercultural understanding through subject-specific language learning, global contexts exploration, and interdisciplinary learning.
- Language A: Students study their first language (e.g., English, French) in depth, focusing on literature, communication skills, and cultural awareness.
- Language B: Students learn a second language, emphasizing communication in real-world situations and cultural understanding.
- Sample: In a MYP Language and Literature unit on "A Good Question," students might explore the ways in which we discover and express ideas through the exchange of communication. Students practice developing questions for thinking about what they will read. Students actively listen to other perspectives and ideas.

Diploma Programme (DP): The International Baccalaureate (IB) Diploma Programme (DP) is a rigorous, two-year educational framework for students aged 16 to 19. It is designed to prepare students for success at university and beyond by providing a broad, balanced, and academically challenging curriculum. The program aims to develop well-rounded individuals who are not only knowledgeable but also critical thinkers, globally-minded, and compassionate.

To earn the full diploma, students must successfully complete three core components in addition to their subject courses. These core elements are:

- Theory of Knowledge (TOK): A course that encourages students to reflect on the nature of knowledge, asking questions like "How do we know what we claim to know?"
- Creativity, Activity, Service (CAS): An experiential learning component that requires students to engage in projects and activities outside the classroom to foster personal growth, self-reflection, and community awareness.
- Extended Essay (EE): An independent, self-directed research project resulting in a 4,000-word academic paper. This component is designed to prepare students for the type of research they will be expected to do in a university setting.

The DP curriculum also requires students to choose six subjects from six different subject groups. Most subjects can be taken at either a Standard Level (SL) or a Higher Level (HL), with HL courses requiring a greater depth of study. This structure ensures that students gain both a breadth of knowledge across different disciplines and a deep understanding of subjects that align with their personal interests.

The DP is internationally recognized and is highly valued by universities for its emphasis on critical thinking, time management, and independent research skills. Research has shown that IB students often have higher college acceptance rates, are more likely to attend top universities, and have a higher persistence rate in their college studies compared to their peers.

Language Learning in the DP

- Focus: Deepening college preparedness, language proficiency and exploring literature in diverse contexts through two language courses:

- Language A: Literature: In-depth study of literature and literary analysis, focusing on a specific language and cultural context.
- Language A: Language and Literature: Balanced study of language acquisition and literary analysis, allowing flexibility in language choice.
- Literature and Performance: Exploration of literature through performance and creative expression, available in English, Spanish, and French.
- Language B: Continued development of communication skills and cultural understanding in a second language.
- Sample: In a DP Language A: Literature course, students might analyze Shakespearean plays, write creative responses, and participate in class discussions about historical and cultural contexts.

Career-related Programme (CP): The International Baccalaureate (IB) Career-related Programme (CP) is an educational framework designed for students aged **16 to 19** who wish to engage in career-related learning. It is specifically created to bridge the gap between academic rigor and practical, real-world relevance.

The CP is a three-part framework consisting of:

- A minimum of two IB Diploma Programme (DP) courses: Students choose these to provide the theoretical foundation and academic rigor for their chosen career path.
- Career-related study (CRS): This is a set of vocational or career-focused courses, often provided by a local college, technical school, or through an apprenticeship. This part of the program provides hands-on, practical learning and is chosen by the school to align with local industry needs.
- The CP Core: This is what makes the CP a truly unique and holistic program. The core helps students develop personal qualities and professional skills for lifelong learning. It is comprised of four components:
- Personal and Professional Skills (PPS): A course that helps students develop skills in communication, critical thinking, ethics, and collaboration.
- Reflective Project (RP): An in-depth research project on an ethical dilemma related to the student's career-related study.
- Language and Cultural Studies (LCS): Ensures students gain exposure to a second language and develop an understanding of different cultures.
- Community Engagement: Provides opportunities for students to apply their knowledge and skills to meet a community need through service learning.

<u>Benefits</u>

The CP is highly flexible and prepares students for a variety of post-secondary pathways, including:

- Direct employment or apprenticeships
- Further education
- Higher education (university)
- Universities worldwide recognize the CP as a valuable qualification that equips students with transferable skills in applied knowledge, critical thinking, and communication, making them well-rounded and resilient learners.

Language Learning in the CP

- Focus: Combining academic language learning with practical application in real-world career contexts.
- Language A: Similar to the DP options, emphasizing communication skills relevant to chosen career paths.
- Language B: Similar to the DP and MYP options, with additional emphasis on communication skills relevant to chosen career paths.
- Sample: In a CP Language A course for students interested in hospitality, students might write menus, conduct mock interviews, and role-play guest interactions in different languages.

IB Courses used in the DP/CP: IB courses can be offered individually or comprehensively for IB Diplomas. Below is a list of courses:

Group 1: Studies in Language and Literature

This group focuses on developing a student's appreciation for language and literature.

- Language A: Literature (SL/HL)
- Language A: Language and Literature (SL/HL)
- Literature and Performance (SL)

Group 2: Language Acquisition

This group is for students learning a new language or enhancing their existing language skills.

- Language B (SL/HL)
- Language ab initio (SL)
- Latin or Classical Greek (SL/HL)

Group 3: Individuals and Societies

This group explores human behavior, societies, and the environment.

- Business Management (SL/HL)
- Economics (SL/HL)
- Geography (SL/HL)
- Global Politics (SL/HL)
- History (SL/HL)
- Philosophy (SL/HL)
- Psychology (SL/HL)
- Social and Cultural Anthropology (SL/HL)
- World Religions (SL)

Group 4: Sciences

This group provides students with the opportunity to study the natural world and develop scientific inquiry skills.

- Biology (SL/HL)
- Chemistry (SL/HL)

- Computer Science (SL/HL)
- Design Technology (SL/HL)
- Physics (SL/HL)
- Sports, Exercise and Health Science (SL/HL)
- Environmental Systems and Societies (SL) - This is an interdisciplinary course that can fulfill a Group 3 or Group 4 requirement.

Group 5: Mathematics

This group focuses on mathematical concepts and their application.

- Mathematics: Analysis and Approaches (SL/HL)
- Mathematics: Applications and Interpretation (SL/HL)

Group 6: The Arts

This group allows students to explore creative expression and artistic disciplines.

- Dance (SL/HL)
- Film (SL/HL)
- Music (SL/HL)
- Theatre (SL/HL)
- Visual Arts (SL/HL)

Note: SL stands for Standard Level and HL stands for Higher Level, indicating the depth of study.

Continuum of Learning: IB components build upon each other, creating a progression of skills and knowledge. Students move from basic literacy and communication in the PYP to deeper analysis and research in the MYP and DP/CP. This continuum prepares students for the rigors of college, language learning, effective communication in various contexts, and success in college, career, and a global world and economy.

Last, international mindedness is also encouraged through a focus on global engagement and service/service learning with the community. Through taking an active role in serving one's local community or choosing to engage in national or international service projects, civic engagement/service learning challenges students to critically consider their environment, privilege, and how to help others, and to recognize that we hold this planet, its people, and its resources in trust for future generations. Through service learning, we establish a pedagogical foundation in the IB – student agency. In all of our programs, student agency focuses on moving beyond awareness and understanding to authentic engagement and action in the world around us. Whether that be through our religious faiths, the problems students care about, or the issues that inspire them to learn, student agency and action through service is a key component of the IB.

Independent

The IB and its programs are unique in many ways. We are a not-for-profit organization, which means that there are no shareholders, and any surplus income is reinvested in our work. We are independent of political and commercial interests. We operate in 164 countries and frequently work alongside national educational systems. Most schools, for example, offer the Diploma Programme (DP) alongside other courses, whereas the Primary Years Programme (PYP) and Middle Years Programme (MYP) are flexible enough to incorporate national, state, and local curriculum requirements/standards.

Research-based

Like the world it seeks to improve through education, the IB never stands still. Our programs and curricula evolve and undergo regular review to ensure we deliver the best possible education for IB students. Our vision is continually refined through research, both our own and that of other respected academic bodies.

Innovative and creative educators from different cultural backgrounds play a crucial role in the development of each program. The programs represent good practices from around the world, and the curriculum review process involves practicing teachers, examiners, and education experts.

We are flexible enough to respond to new research and pedagogical studies and engage with expert analysis where appropriate. For example, the IB Career-related Program (CP), our newest qualification, is designed to provide a flexible learning framework that meets the needs of students, the local community, and the world beyond.

Widely recognized

Our programs are recognized globally. Both the DP and CP align with the Early Postsecondary Opportunities (EPSOs) directly, as both programs bring college credit, college readiness, and high college persistence outcomes. Universities and future employers recognize the depth and breadth of the rigorous work undertaken by IB students and often recruit them because of their academic expertise, as well as their broad exposure to studies and service. To complement this breadth, the depth of subject study is not sacrificed. In addition to the 2-year courses covering six subjects, universities welcome the creativity, activity, and service (CAS) requirement; the career-related study component of the CP; the 4,000-word extended essay component in the DP; the 3,000-word ethical analysis of the CP Reflective Project; and all of the other demands, research, analysis, and in-depth study to prepare students for work at university level.

Research by and with universities in Australia, Canada, the United Kingdom, and the United States has demonstrated that IB students are well-prepared for university.

Examples of Courses/Curricular Frameworks and Materials Used

Each of the four IB programs provides a detailed and developmentally appropriate curriculum or curriculum framework that is broad, balanced, conceptual, and connected.

IB programs offer students access to a broad and balanced range of academic studies and learning experiences. They promote conceptual learning, create frameworks within which knowledge can be acquired, and focus on powerful organizing ideas that are relevant across subject areas, helping to integrate learning and add coherence to the curriculum.

The programs emphasize the importance of making connections, exploring the relationships between academic disciplines, and learning about the world in ways that reach beyond the scope of individual subjects. They also focus on offering students authentic opportunities to connect their learning to the world around them.

The four programs are all underpinned by a shared focus on international-mindedness and the development of the attributes of the IB Learner Profile. Yet each program also has its own identity and developmentally appropriate elements, as shown in the following examples.

- In the PYP, learning aims to transcend traditional boundaries between subject areas. Students explore six transdisciplinary themes of global significance: who we are; where we are in place and time; how we express ourselves; how the world works; how we organize ourselves; and sharing the planet.
- In the MYP, students explore six global contexts that extend, the PYP transdisciplinary themes: identities and relationships; personal and cultural expression; orientation in space and time; scientific and technical innovation; fairness and development; globalization and sustainability.
- In the DP, the curriculum consists of six subject groups and the three elements of the DP core. As one of these core elements, the Theory of Knowledge (TOK) course encourages students to become more aware of their own perspectives and assumptions through an exploration of the fundamental question of how we know what we know.
- In the CP, students combine the study of DP courses with career-related studies and the four elements of the CP core. As one of these core elements, the Personal and Professional Skills course focuses on preparing students to effectively navigate a range of personal and professional situations that they may encounter in the workplace.

All four IB programs also require the completion of a culminating project: the Personal Project, the Community Project, the DP Extended Essay, and the Reflective Project. These projects offer students the opportunity to both deepen and showcase their knowledge, understanding, and skills, while celebrating their learning journeys.

Meaningful assessment supports curricular goals. In IB programs, assessment is therefore ongoing, varied, and integral to the curriculum. IB schools use a range of strategies and tools to assess student learning. Emphasis is placed on the importance of analyzing normative assessment data for learning and teaching, and on recognizing that students benefit by learning how to assess their work and the work of others.

The MYP, DP, and CP also offer a range of IB-validated assessments. These assessments strike a balance between validity and reliability, offering assessment tasks that, for example, require students to demonstrate higher-order thinking rather than simple, factual recall. These

rigorous assessments help to maintain the IB's hard-earned reputation for high standards and challenging programs.

Assessment Descriptions

Each IB program has unique passing conditions.

PYP

The PYP does not offer a formal assessment. The prime objective of assessment in the PYP is to provide feedback on the learning process. Additionally, the PYP stresses the importance of both student and teacher self-assessment and reflection. Consequently, the PYP can align easily to local, state, or national assessments without adding additional assessment burdens on students.

MYP

The MYP is a five-year program, and schools are authorized to offer at least two years of the MYP. The curriculum framework consists of eight subject groups. The MYP requires at least 50 hours of teaching time for each subject group in each year of the program. All MYP students must also complete a long-term project: the MYP Personal Project. The MYP is similar to the PYP in that there are no mandated assessments conflicting with local or state assessments.

How MYP results are calculated

Candidates at the end of their year-five MYP studies enter the IB external assessment. The outcomes of these assessments are recorded in an MYP course results document. Candidates can choose to:

- do the personal project only, leading to a school certificate, or
- take additional assessments (ePortfolios or on-screen examinations), which can lead to the award of the MYP certificate.

Schools can also issue an MYP record of participation. This is for MYP students who study the program for at least two years and complete the requirements in year three or year four of the MYP. These students are not registered with the IB for any form of assessment. The school-based record of participation is a school-based document, not verified by the IB organization.

The MYP certificate

To achieve the MYP certificate, the student must have participated in the final year of the program, with a recommended period of participation of two years, and:

- Complete either an on-screen assessment or ePortfolio in six subjects consisting of language and literature, language acquisition (or a second language and literature), individuals and societies, mathematics, sciences, and one subject from either arts, physical and health education or design
- Achieve at least a grade of 3 in each of the six subjects
- Complete the on-screen examinations in interdisciplinary assessment and achieve at least a grade 3
- Complete the personal project with at least a grade 3
- Obtain a total of 28 points overall
- Meet the school's expectations for community service.

The optional eAssessment assesses students' knowledge in two different ways:

- ePortfolios of student work in arts, design, and physical and health education, which is then moderated to ensure a consistent global standard
- on-screen examinations (up to two hours in duration) for courses in language and literature, language acquisition, individuals and societies, sciences, mathematics, and interdisciplinary learning.

In addition, the Personal Project is submitted electronically to the IB and moderated.

DP

The diploma points are calculated by adding together the grades achieved from each of the six subjects and the core. Candidates receive a grade of 1-7 for each subject and up to three points for the core elements (EE and TOK). Standard Higher Level (SL) and Higher Level (HL) subjects are equally valued in determining a student's final points. To earn a diploma, students must accumulate at least 24 points and meet the conditions outlined below.

The highest score that a candidate can achieve is 45 points. The maximum points of 45 is obtained from 6 (subjects) times 7 (top grade) plus 3 points from the core.

For TOK and the EE, candidates receive a grade from A to E. The third element of the core, CAS, does not receive a grade. Completion is assessed by the school.

Candidates can earn between zero and three points towards the overall diploma points.

A candidate can only receive an IB Diploma if the following conditions are met:

- CAS requirements are met
- The candidate has achieved at least 24 total points
- A grade has been awarded in all subjects, TOK and the EE
- A grade of at least a 2 has been awarded in all subjects
- The candidate does not have a grade 2 awarded 3 or more times
- The candidate does not have a grade 3 awarded 4 or more times
- The candidate has at least 12 points on HL subjects. (For candidates who register for four HL subjects, the three highest grades count)
- Candidates have at least 9 points on SL subjects. (Candidates who register for two SL subjects must be awarded at least 5 points at SL)

CP

To achieve a CP certificate, a candidate must meet all the following requirements.

- The school has confirmed that the candidate has completed the specified career-related study/career and technical education (CTE) pathway
- The candidate has been awarded a grade of 3 or more in at least two of the DP courses (students can take up to 4 IB courses in the CP to maximize dual enrollment/college credit alongside their CTE)
- The candidate has been awarded at least a D grade for the reflective project
- The school has confirmed that all personal and professional skills, community engagement, and language and cultural studies requirements have been met
- The candidate has not received a penalty for academic misconduct from the Final Award Committee

The IB supports all approved US CTE pathways due to the rigorous state and district processes in place for career and technical education/career-related studies. As long as a district, as the governing authority, approves a CTE, and that CTE is concurrent over 2 years, the CTE meets the standards of the CP.

The IB employs a rigorous system of course audits and external assessments to validate student results, ensuring the fairness, reliability, and international comparability of its diplomas. Here's a breakdown of the key components:

Course Audits:
External moderators: Experienced and qualified IB educators, independent of the schools and students, review and verify all internally assessed coursework (internal assessments, teacher predictions, etc.).

Detailed audit criteria: Moderators assess against established criteria specific to each subject and level (Standard Level or Higher Level). This includes aspects such as content coverage, assessment task design, marking consistency, and the application of the IB Learner Profile.

Feedback and potential adjustments: Moderators provide feedback to schools, and in rare cases, may adjust internal assessment grades based on identified discrepancies. This ensures a standardized and fair evaluation across all IB schools globally.

External Examinations:
Standardized exams, developed and administered by the IB, assess students' knowledge and skills acquired throughout the program in a controlled environment.

Blind marking: Scripts are anonymized and sent to experienced examiners worldwide for independent marking, eliminating potential bias.

Rigorous marking schemes: Detailed mark schemes ensure consistent and objective assessment across all scripts.

Double marking: For most subjects, scripts are marked by two independent examiners, with discrepancies resolved by a senior examiner.

External moderation: Additional checks by experienced examiners ensure consistent application of marking schemes and address any potential concerns.

Validation of Results:
Combined score: Final grades are determined by combining the internally assessed coursework (usually 25-50%) and the external examination (usually 50-75%).

Awarding of diplomas: Students must achieve a minimum overall score and meet specific requirements across different subject groups to be awarded the IB Diploma.

Statistical analysis: The IB conducts regular statistical analyses of results to ensure consistency and identify potential areas for improvement.

Additional Features:
Random sampling: The IB reserves the right to randomly sample student work from any school for further scrutiny, ensuring continued compliance with assessment regulations.

Investigative procedures: Robust procedures exist to investigate allegations of malpractice or irregularities, safeguarding the integrity of the assessment process.

This multi-layered approach guarantees the accuracy, fairness, and global comparability of IB student results, making the IB Diploma a highly recognized and respected qualification worldwide.

Professional Learning & Training

The International Baccalaureate (IB) Professional Development (PD) approach applies questioning, reflection, and action to all professional learning experiences. Through open communication and action-oriented inquiry, IB PD builds on educators' knowledge and shares best practices across diverse experiences. Educators and administrators who complete IB professional development are even better prepared to apply their skills in any cultural or school context, weave significant issues into their work, and care for the whole student in a way that meets the unique needs of today's students while reflecting IB philosophy.

IB's practice-based lifelong learning enables educators to develop new insights into pedagogy and practices, hone skills in curriculum and unit planning, explore new ideas, experiences, and student-centered teaching approaches, apply inquiry-based concepts to real-world cultural contexts, and become reflective practitioners.

Every IB professional learning experience is grounded in the process of social constructivism and actualized through action-oriented inquiry, centered on the learning community and driven by a shared set of design values and principles. Relevant academic research provides a professional context for integrating and applying concepts and skills from other parts of an educator's learning experiences.

IB PD is flexible. Pre-scheduled or on-demand, individualized or peer-to-peer, educators and administrators can access learning experiences through a range of convenient delivery channels, maximizing the power of the IB global community for each educator.

Requested PD workshops: Schools can request a PD event to meet their professional learning needs. These events support schools in meeting authorization and evaluation requirements, providing a collaborative environment for teachers and staff while eliminating or significantly reducing participant travel costs.

- Single-school events are school-requested IB PD events consisting of one or more workshops organized to meet one school's professional development needs. These events can be delivered according to one of the four modes of delivery listed below.
- Multi-school events are school-requested IB PD events that consist of one or more workshops organized to meet the professional development needs of two or more schools located within proximity to one another. These events can be delivered according to one of the four modalities listed below.
- Modes of delivery:
    - Requested face-to-face workshops are delivered in person at a school location or an external venue chosen by the requesting school, subject to IB approval.
    - Requested virtual workshops allow schools to engage in synchronous learning through a dedicated online platform or 'virtual classroom', without the need to attend training at a school facility. Within the virtual classroom, participants engage with the same content and achieve the same learning outcomes as our face-to-face events, led by an approved IB Workshop Leader in a format optimized for virtual delivery.
    - Requested blended workshops combine face-to-face and remote learning approaches and minimize time away from school. This delivery option consists of three hours of asynchronous online learning alongside a two-day face-to-face event.

- Requested online workshops provide educators with an exclusive online workshop offering for their school. These workshops delivered to one school cohort allow closer interaction with online facilitators and therefore offer a more school-specific experience.

Scheduled PD Workshops: IB also sets a schedule of professional development offerings that are open to educators for registration and attendance. Scheduled events are delivered by the IB or one of our official providers.

- Scheduled face-to-face events are organized to meet the training needs of educators throughout the global IB community. They are open for mass participation and take place in a variety of locations according to market needs (including hotels, conference centers, universities, and schools).
- Scheduled online events provide educators with the opportunity to experience the same learning outcomes as face-to-face workshops, but with added flexibility where participants do not need to take time out of school. The workshop is an asynchronous online course with at least one opportunity for live (synchronous) engagement. Participants are a part of a global cohort for the workshop. One event is held monthly with a variety of workshop sessions scheduled.
- Scheduled virtual events allow educators to take part in the same scheduled training usually offered at our face-to-face IB regional events, without traveling or physically attending sessions at a designated venue. Workshops at virtual regional events will be delivered live within a dedicated virtual classroom.

Self-paced learning: Self-paced modules are fully online and asynchronous and can be completed at the educator's own pace.

- Self-paced modules allow educators to access professional development from wherever they want and at their own pace.
- Self-paced modules can be completed and revisited repeatedly. They are generally hyper-focused and cover topics not normally featured in typical IB professional development workshops and events allowing educators to dig deep into areas of their choice.

Addendum: “What is IB professional development?”

IB PROFESSIONAL DEVELOPMENT
DEVELOPING LEADERS IN INTERNATIONAL EDUCATION

International Baccalaureate
Baccalauréat International
Bachillerato Internacional

What is IB professional development?

IB professional development workshops and resources are essential tools to develop both educators and school programmes, however far along a school is on its authorization journey. With multiple modalities and offerings available, IB professional development offers flexibility, affordability, and opportunities for collaboration across school communities.

What are the options for professional development?

Scheduled PD

We set a schedule of professional development offerings that are open for educators to register and attend.

Regional events are scheduled face-to-face training events that are organized to meet the training needs of educators throughout the global IB community. They are open for mass participation and take place in a variety of locations according to market needs (including hotels, conference centres, universities, schools). Regional events are delivered by the IB or one of our official providers.

Online workshop events provide educators with the opportunity to experience the same learning outcomes as face-to-face workshops, but with added flexibility where participants do not need to take time out of school. The workshop is an asynchronous online course with at least one opportunity for live (synchronous) engagement. Participants are a part of a global cohort for the workshop. One event is held monthly with a variety of workshop sessions scheduled.

Regional Virtual events provide the opportunity for educators to take part in the same scheduled training usually on offer at our face-to-face IB regional events, without the need to travel or physically attend sessions at a designated venue. Workshops at virtual regional events will be delivered live within a dedicated virtual classroom. Regional virtual events are delivered by the IB or one of our official providers.

Requested PD

Schools can request an event to meet their professional learning needs. These events support schools in meeting authorization and evaluation requirements, and provide a collaborative environment for teachers and staff, while eliminating or greatly reducing participant travel costs.

Single-School events are school requested IB PD events that consist of one or more workshops organized to meet one school's professional development needs. These events can be delivered according to one of the four modes of delivery listed below.

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Multi-school events are school requested IB PD events that consist of one or more workshops organized to meet the professional development needs of two or more schools located within close proximity to one another. These events can be delivered according to one of the four modalities listed below.

Modes of delivery:

Face to face workshops are delivered in person at a school location or at an external venue chosen by the requesting school, subject to IB approval.

Online workshops provide educators with an exclusive online workshop offering for their own school. These workshops delivered to one school cohort allow closer interaction with online facilitators and therefore offer a more school-specific experience. Online by request achieves the same learning outcomes as our scheduled online events, with workshops led by an approved Online Facilitator.

Virtual workshops allow schools to engage in synchronous learning through a dedicated online platform or 'virtual classroom', without the need to attend training at a school facility. Within the virtual classroom, participants engage with the same content and achieve the same learning outcomes as our face-to-face events, led by an approved IB Workshop Leader in a format optimised for virtual delivery.

Blended workshops combine face-to-face and remote learning approaches (currently available only in the Americas region) and minimize time away from school. This delivery option consists of three hours asynchronous online learning alongside a two-day face-to-face event.

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IB PROFESSIONAL DEVELOPMENT
DEVELOPING LEADERS IN INTERNATIONAL EDUCATION

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Chart of Global PDD offerings:

Model:	PD type:	Provided by:	Duration:	Participant minimum:
Single school: Face-to-face	Requested	The IB	15 hours instruction over 2 days (AEM & AP) 15 hours instruction over 2.5 days (AM) or 15 x1.5-hour sessions (3 days) (AP) 6 hours of instruction over one day (Introductory and Extended Essay in focus: A one day intensive workshop)	7 participants from one school
Multi-school: Face-to-face	Requested	The IB	15 hours instruction over 2 days (AEM & AP) 15 hours instruction over 2.5 days (AM)	7 participants from at least two schools
Single school & Multi-school: Blended (Americas only)	Requested	The IB	12 hours of instruction over 2 days with additional 3-hour Independent learning assignment	7 participants
Single school & Multi-school: Online	Requested	The IB	Minimum of 16 hours over four weeks 6 hours of instruction over one week (Introductory workshop)	7 participants
Single school & Multi-school: Virtual	Requested	The IB	15 hours of instruction over 2 days with independent learning assignment 6 hours of instruction over one day (Introductory and Extended Essay in focus: A one day intensive workshop)	7 participants
Face-to-face	Scheduled	The IB or external provider	15 hours of instruction over 2-2.5 days	4 participants per workshop or minimums determined by provider
Virtual	Scheduled	The IB or external provider	15 hours of instruction over 3 - 6 days	4 participants per workshop or minimums determined by provider
Online	Scheduled	The IB	Minimum of 16 hours of instruction over four weeks (not self-paced)	4 participants
Online	Self-paced	The IB	5 hours of active online participation (Access available for 6 months after registration)	Not applicable

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Appendix – per participant costs across models:

		Africa, Europe, Middle East			North America & Latin America	Asia-Pacific
Model	**Delivery mode**	**EUR**	**GBP**	**CHF**	**USD**	**SGD**
Single school & Multi-school	**Face-to-face** 2-day (standard) pricing	€279	£255	CHF 305	$350	$450
	Face-to-face 1-day pricing*	€89 (7-50 participants)	£80 (7-50participants)	CHF 95 (7-50 participants)	$110 (7-50 participants)	$140 (7-50 Participants)
		€69 (51+participants)	£65 (51+participants)	CHF 75 (51+participants)	$85 (51+ participants)	$110 (51+participants)
	Face-to-face Extended Essay in focus: A one day intensive pricing	€139	£130	CHF 150	$175	$230
	Blended pricing (Americas only)	N/A			$350	N/A
	Requested Online 4-week (standard) pricing	€230	£200	CHF 250	$270	$380
	Requested Online 1-week pricing*	€65 (7-50 participants)	£55 (7-50participants)	CHF 70 (7-50 participants)	$75 (7-50 participants)	$100 (7-50 participants)
		€50 (51+participants)	£45 (51+participants)	CHF 55 (51+participants)	$60 (51+ participants)	$80 (51+ participants)
	Requested Virtual 2-day (standard) pricing	€250	£210	CHF 270	$290	$400
	Requested Virtual 1-day pricing*	€65 (7-50 participants)	£55 (7-50 participants)	CHF 70 (7-50 participants)	$75 (7-50 participants)	$100 (7-50 participants)
		€50 (51+ participants)	£45 (51+ participants)	CHF 55 (51+ participants)	$60 (51+ participants)	$80 (51+ participants)
	Requested Virtual 2-day pricing*	€130 (7-50 participants)	£110 (7-50 participants)	CHF 140 (7-50 participants)	$150 (7-50 participants)	$200 (7-50 participants)
		€100 (51+participants)	£90 (51+participants)	CHF 110 (51+participants)	$120 (51+participants)	$160 (51+participants)
	Requested Virtual Extended Essay in focus A one-day intensive pricing	€119	£105	CHF 125	$145	$185

for Developing the MYP & Developing the CP only

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Scheduled Professional Development			
Delivery Mode:	**Africa, Europe, Middle East**	**Americas**	**Asia-Pacific**
Scheduled Face-to-Face	**EUR**	**USD**	**SGD**
	€860 (standard) €930 (late fee)	IBNA: $744 IBLA: $483	$916 (early bird) $996 (standard)
Scheduled Virtual	€470	$550	$760
Scheduled Online	$450 USD across regions		
For provider events, prices are determined by our external providers			

Self-paced Professional Development			
Delivery Mode:	**Africa, Europe, Middle East**	**Americas**	**Asia-Pacific**
Self-paced	$125 USD across regions		

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DELIVERY OF SERVICES

The successful Proposer must offer a total program to achieve the objectives outlined in the Scope of Work in this Request for Proposal. The courses/curricular frameworks should encourage and support student content and skill development. Upon completion of the course, the program should provide the option of a rigorous assessment that, upon demonstrated mastery, would result in credit in colleges or universities.

The proposed program must also include professional learning to enhance our employees' skills and/or abilities in research-based instructional practices related to the varied courses/curricular frameworks. The program should support schools to provide equity and rigorous academic performance for all students, as detailed in this RFP.

Proposers must provide comprehensive narrative statements that outline their program's implementation and management plans. This information should fully illustrate how the program will serve to accomplish the work and furnish the deliverables described. Respondents do not need to submit a complete curriculum.

Courses/curricular frameworks for multiple content areas

The International Baccalaureate (IB) offers several programs designed to provide a high-quality, international education to students around the world.

Primary Years Program (PYP): The PYP is designed for students aged 3 to 12, focusing on the development of the whole child. It emphasizes inquiry-based learning, encouraging students to ask questions, explore concepts, and take action in their learning. The PYP framework is organized around six transdisciplinary themes that promote connections across subjects.

Middle Years Program (MYP): The MYP is designed for students aged 11 to 16, providing a framework that encourages students to make connections between their studies and the real world. It emphasizes interdisciplinary learning, critical thinking, and communication skills. The MYP curriculum is organized around eight subject groups and includes a personal project that allows students to explore their interests and develop skills beyond the classroom.

Diploma Programme (DP): The DP is a rigorous pre-university program designed for students aged 16 to 19. It offers a broad and balanced curriculum that includes six subject groups, along with the DP core components: Theory of Knowledge (TOK), Extended Essay (EE), and Creativity, Activity, Service (CAS). The DP aims to develop students who are knowledgeable, reflective, and principled, preparing them for success in higher education and beyond.

Career-related Programme (CP): The CP is designed for students aged 16 to 19 who wish to pursue a career-related education alongside academic studies. It combines academic courses with career-related study and the CP core components: Personal and Professional Skills (PPS), Community Engagement, Language and Cultural Studies, and Reflective Project. The CP aims to develop students who are well-rounded, culturally aware, and prepared for both further education and the workplace.

Each IB program shares a commitment to international-mindedness, inquiry-based learning, and the development of key skills and attributes such as critical thinking, communication, and intercultural understanding. The programs aim to foster lifelong learners who are equipped to contribute positively to their communities and the world.

Rigorous assessments that could culminate in postsecondary credit

Within the IB framework, rigorous assessments that could culminate in postsecondary credit include:

IB DP Exams: At the end of the IB DP, students take examinations in six subject areas. Depending on their scores and the policies of individual colleges and universities, students may receive college credit or advanced standing for their performance on these exams.

IB CP Assessments: The IB CP includes a range of assessments, including examinations, projects, and reflective statements. Depending on the subject areas and assessments completed, students may be eligible for recognition of their achievements by postsecondary institutions.

In both the IB DP and CP, the rigor of the assessments from IB courses is designed to prepare students for success in postsecondary education and beyond. IB assessments are internationally recognized and valued by colleges and universities around the world, although the policies for granting credit may vary among institutions.

Recognition of IB courses across the United States varies among colleges and universities. However, many institutions in the US recognize the rigor and academic quality of IB courses and offer various forms of recognition, including:

- College credit: Some colleges and universities grant college credit or advanced placement to students who have completed IB courses and achieved certain scores on IB exams. The specific score requirements and policies for awarding credit vary by institution and may differ for each IB subject area.
- Advanced standing: In addition to college credit, students who have completed IB courses and exams may receive advanced standing, which allows them to enroll in higher-level courses or skip introductory courses in their major field of study.
- Admissions consideration: Many colleges and universities consider IB coursework and exam results as part of the admissions process. Students who have pursued the full IB Diploma Programme or completed individual IB courses may receive favorable consideration during the admissions review.
- Course equivalencies: Some institutions have established course equivalencies for IB courses, meaning that completion of certain IB courses may fulfill specific college course requirements. These equivalencies are typically outlined in the university's course catalog or transfer credit policies.
- International perspective: Colleges and universities value the international perspective and interdisciplinary approach of the IB curriculum. Completion of IB coursework demonstrates a student's ability to engage in rigorous academic study and prepares them for success in higher education.

States like Florida, Texas, Colorado, and others mandate the acceptance of IB courses for college credit. The recognition of IB courses by universities in Tennessee, as well as in other states and countries, varies depending on the policies of individual institutions. However, many universities in Tennessee and across the United States recognize the rigor and academic quality of IB courses and may offer credit, advanced placement, or other benefits to students who have completed IB coursework or exams. The University of Tennessee accepts both Standard (SL) & Higher-Level (HL) Courses for college credit, as does the University of Memphis, Middle

Tennessee State University, and Belmont University. Vanderbilt University accepts most IB HL courses for college credit.

Students need to research IB recognition policies of the colleges and universities they are interested in attending. Many institutions have dedicated admissions or registrar's office staff who can provide information about IB recognition and credit transfer policies. Additionally, students should consult with their high school counselors and college advisors to understand how IB coursework and exams may impact their college admissions and academic plans.

Professional learning for educators to deliver high-quality courses/curricular frameworks

Highly experienced IB educators and leaders design, develop, and deliver professional learning experiences for their peers. These facilitators are members of the IB Educator Network (IBEN) and come from a worldwide professional learning community of internationally-minded educators, school leaders, and administrators. English, Spanish, and French are the core languages of IB instruction, with workshops and other learning experiences delivered in schools' languages of instruction, such as Mandarin, Arabic, Turkish, and Japanese.

IB educators and leaders participate in IB's practice-based lifelong learning for many reasons: to develop new insights into pedagogy and practices, to hone skills in curriculum and unit planning, to explore new ideas, experiences, and student-centered teaching, to apply inquiry-based approaches and concepts, to real-world cultural contexts, and to become reflective practitioners.

IB offers a robust selection of learning experiences and services for every point of the professional journey. Enhancing practical relevance, delivering a more integrative experience, and offering collaborative, team-based activities online and in person, IB develops educators who bridge the worlds of scholarship and practice.

Consistency of the professional learning experience is ensured through a global architecture and continuous improvement through a robust quality assurance framework. The IB is devoted to inclusivity and responds to the full diversity of participant needs. This includes language, culture, age, and geography, as well as learning styles, degrees of IB experience, and access to and fluency with technology.

IB ensures that training enables both teachers and leaders to examine teaching and learning through the lens of inclusive and equitable education. Training centers around helping educators develop a sense of belonging, participation, and engagement of all students by removing barriers to learning. All workshops build this into their core through IB values and principles and specialized workshops dig deeper into these areas.

When workshops conclude, surveys assess workshop facilitators' capabilities, content quality, and overall satisfaction with the learning experience. This evaluation system engages participants in observation, analysis, and reflection about the learning experience and helps IB ensure quality, consistency, and continuous improvement.

Training/professional learning about the services & supports included in the program

The IB offers a wide range of PD options for educators and leaders. Workshops are delivered through four different methods: face-to-face, online, virtual, and a 'blended' method combining remote and face-to-face learning to better accommodate the diverse needs of both educators and schools, for flexibility and broader access.

All workshops are facilitated by passionate and knowledgeable leaders with extensive experience in teaching IB programs. They serve as a powerful tool to ensure schools meet the professional development requirements that guarantee stronger program implementation and positive student outcomes.

IB PD workshops are organized in three different categories, each addressing specific professional development goals for educators and leaders worldwide.

- **Category 1** workshops are focused on philosophy and implementation. These workshops are great for educators who are new to the IB, if you are familiar with the IB program structure but would like greater confidence before teaching a course, or if you've inherited a course and need to review the subject content to suit your style and expertise.
- **Category 2** covers delivery of the four IB programs. These workshops are perfect for enhancing your understanding of assessment in IB programs, in making connections between program frameworks and classroom practice, and for the discussion and analysis of standards and practices.
- **Category 3** builds on and enhances professional development portfolios, great for educators who would like to delve deeper into topic areas or master a particular subject. Category 3 workshops are suitable for all educators, regardless of whether or not they teach IB programs.

Addendum: Example IB workshop guidelines

Primary Years Programme

International Baccalaureate

Category 1 workshop session guidelines and planner

Making the PYP happen: Implementing agency

Version 1: January 2019

International Baccalaureate
Baccalauréat International
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Dear Workshop Leaders,

PYP professional development

The aim of PYP professional development is to create and support a culture of teacher quality and growth for all PYP educators and leaders. This workshop is based on the belief that all participants will bring a level of expertise. While this expertise is to be valued and utilized, the aim of this workshop is also to challenge the way content is viewed – its role and its position within learning and teaching. There is no need for the Workshop Leader to be the 'expert' on the topic, rather, the Workshop Leader is to act as the facilitator for everyone to grow in their own expertise. Throughout this workshop, participants will undertake a personal inquiry into philosophy and practices, critically engage with professional literature and support fellow workshop participants to reflect on and refine learning and teaching. The intention is for participants to co-construct and create understanding of the workshop.

The purpose of each workshop is aligned with the goals and objectives identified in the global architecture and linked to the quality assurance surveys completed by workshop participants to promote consistency in high-quality professional development offerings across all IB regions. (A copy of the participant survey is available on the WRC.)

Learners at the centre

Research into the IB teacher professional revealed that IB teachers believe being a learner themselves is as important as being knowledgeable about teaching, their content area and the world. Being a thinker, a problem solver, caring and being aware of diverse cultures and global issues motivates them to educate the whole child. They value flexibility to design effective instructional activities based on the needs of their students and the context of their school and the ability to use professional judgement to form their teaching practice.

To support and extend these attributes, perspectives and beliefs, this workshop is designed so you can help participants build teaching capabilities. This allows the workshop to be more personalised often offering context based self-directed learning, supporting teacher performance and accomplishment. You'll find that the capabilities, derived from the IB approaches to teaching, have related pedagogical content knowledge, understandings and skills in *PYP: From principles into practice*.

Materials

The session guidelines outline the key conceptual understandings that underpin this workshop. The sample workshop planner provides you with suggested ways to engage participants with these understandings.

Materials to support this workshop can be found in the resources on the WRC. A PowerPoint (PPT) has been created that includes graphics, digital objects, images, key messages and quotes for you to build and develop your own workshop and to meet the needs of your participants. A set of personas has been identified for this workshop. You may find these useful for introducing challenges in a different way, or to act as provocateurs for a new perspective.

We ask participants to engage with certain sections from the IB publication PYP: From principles into practice. As this is a digital resource, they will need to follow the pathway indicated in the instructions of the workshop.

Planning your workshop

As Workshop Leaders, you have flexibility to choose learning engagements that develop the workshop understandings taking consideration of the workshop cohort and context as well as making connections to the IB programme standards and practices and any new materials that are published by the IB. You are invited to revise the order of sessions or change learning engagements and supporting materials providing the workshop remains true to the session guidelines, and that any alternative third-party materials are cleared for copyright permissions.

Please consider how the learning engagements you select reflect the aspirational aims of PYP workshops, in particular how they:

- meet functional, emotional and social needs of participants
- support multiple ways to engage in learning
- promote professional capability development
- recognise the diversity and experience of its educators
- recognise and promote that everyone is an architect of his/ her own learning
- support collaboration through local and global learning networks
- focuses on praxis; providing practical application and an evidence base

Your feedback is always appreciated. Please send your comments, concerns or suggestions to Sue Richards at pyp.pd@ibo.org. Thank you for agreeing to offer a PYP workshop. I appreciate the care and diligence you put into planning and delivering workshops.

Kind regards



Sue Richards

Global Head Professional Services (PYP and online)

WORKSHOP OVERVIEW

Recommended audience	All PYP teachers (early years, primary years, new to PYP and with some experience of the PYP)			
Workshop description	By exploring the PYP framework, you will ascertain how voice, choice and ownership are recognised and developed by members of the IB community. You will be supported in your understanding of learning and teaching in a transdisciplinary, concept-driven curriculum and how to design this in your own school context. This workshop invites you to inquire into your own teaching practices and reflect on how you can develop the capabilities of a PYP teacher.			
Conceptual understandings	Situating learning in local and global contexts supports students' understanding of human commonalities	Transdisciplinary learning design deepens students' understanding of complex ideas	Collaborative relationships support well-being	Diverse ways of knowing, doing and thinking are supported by well-designed learning environments
Lines of inquiry	● An introduction to the PYP ● Developing global citizens through the IB Learner profile ● Embedding international-mindedness into learning and teaching ● Language as a vehicle to identify human commonalities	● Transdisciplinary learning ● A concept-driven curriculum ● Approaches to learning	● Student agency reflected in student action ● The inquiry process as the vehicle for learning and teaching ● The collaborative planning process and the role of the Planner	● Inclusive learning environments and spaces ● How the elements of the PYP support holistic learning ● Next steps as a PYP educator
Success criteria (for participant selection)	Select three from the following six options that you would like to focus on further throughout the workshop: • I will integrate transdisciplinary and disciplinary concepts, knowledge, and skills in a way that supports a coherent learning experience for students. • I will situate learning in global contexts that support students' understanding of human commonalities (for example, through transdisciplinary themes). • I will support students to initiate and engage in their own inquiries. • I will promote student reflection and action in response to their learning. • I will establish, engage and maintain collaborative relationships that support the well-being of the learning community.			

	• I will select teaching approaches, resources, technologies, learning experiences and assessments that are inclusive and effective for diverse students.
Reflection prompts	• How is my understanding evolving of PYP principles and practices? • In what ways can I apply learning from this workshop in my own learning and teaching? • How is agency supported and nurtured through this workshop?

IMPORTANT INFORMATION FOR WORKSHOP LEADER S

Workshop approach and main messaging

In this workshop, case studies, scenarios and problem-based learning using personas are put forward as approaches to engage participants. There are also elements of design thinking. As you determine the flow of the workshop and customize the design for the cohort you will be leading, please use, amend, add to or change the approach to best suit the setting you are going to facilitate.

Throughout the workshop, you will find **persona challenges**, most of which are optional. Please feel free to substitute these for more specific examples that relate directly to your participants' contexts. The personas are a tool at a Workshop Leader's disposal. They could be used:

- to add different perspectives in a homogenous participant group;
- to pose a case study or particular scenarios using the lens of one or more personas;
- to support differentiation in workshops. The pre-workshop survey may identify differing needs of participants that personas could support using more needs-focused engagements;
- as a reflective tool for the Workshop Leader to consider when assessing whether the content is addressing the needs of participants.

Throughout this workshop, participants will undertake a personal inquiry into their philosophy and practices, critically engage with professional literature and support fellow workshop participants to reflect on and refine their learning and teaching practices. The aim is for participants to co-construct and create understanding of PYP principles and practices.

Each session provides background information for Workshop Leaders, some possible options for learning engagements, possible supporting resources and key take-away messages. Workshop Leaders have the ability to develop their own learning engagements or use the suggestions provided.

Opportunities for reflection on participants' growth as PYP teachers should be built into the process. In the accompanying PowerPoints, a slide has been included to prompt reflection at the end of each session. In addition, at the end of each day of the workshop, there is a slide containing reflective threads that are common throughout all PYP workshops.

Pre-workshop assessment

The following prompts can be sent to individuals or groups as validation and self-assessment of the prior understandings and experiences they bring to this workshop. Please feel free to edit the questions below to ensure that the reflection is relevant to the workshop understandings and to particular groups of participants.

1. What are your key expectations for this workshop?
2. How familiar are you with the focus/understandings of this workshop?
3. How comfortable are you with contributing/participating/collaborating?
4. What's your level of proficiency in the language of instruction of the workshop?
   A) Basic B) Advanced C) Proficient

5. How would you describe yourself as a learner? What helps you to learn best?

Participants are asked to bring

- Their school's programme of inquiry for their year level
- Any other examples of practice that you as Workshop Leader deem appropriate.

Supporting materials

There is an accompanying PowerPoint and a number of proposed PDF resources to support the learning engagements proposed in this workshop plan. It is recommended that you tailor them to fit the workshop you are leading. Each learning engagement in the plan is referenced by numbers (LE 1.1). You can then cross check with the PowerPoint slides (see the notes section below each slide) to see whether there is a relevant slide to accompany particular engagements.

Referencing sections from *PYP: From principles into practice*

Please note, readings from the digital resource *PYP: Principles into practice,* are included for almost every session. There are no page numbers in the digital resource, so section headings have been referenced in the plan, for example: Refer to The learning community/A community of learners/A PYP learning community/A shared commitment). The underlined text indicates the final heading that you are looking for. It does look complicated, but in your workshop planning you can insert hyperlinks if you like (this was not possible at the time of developing this workshop planner). You will need to familiarize yourself with the various section headings and perhaps post links to these in your plan and PowerPoint for easy access.

In this category 1 workshop, it is likely that some participants will not have access to the digital resource if they are not in a candidate or authorized IB World School. In this instance, you may like to have available in your workshop space (for example, wiki, google site, electronic workbook) the text from these sections.

Abbreviations

Abbreviations used in this workshop planner are as follows:

ATL – Approaches to learning
LE – Learning Engagement
LT – Learning and Teaching
PDF – Portable Document Format (a file format that cannot be easily modified)
PRC – Primary Resource Centre
WRC – Workshop Resource Centre
PYP – Primary Years Programme
TSM – Teacher Support Material

How might this workshop look over ten sessions?

Workshop Leaders are encouraged to read through the workshop materials carefully and consider how they might organize the workshop for a PD event.

As a starting point, the original developers have proposed the following ten session overview/map for consideration. However, Workshop Leaders may organize it differently, depending on identified needs in each workshop context.

DAY ONE	DAY TWO	DAY THREE
Session 1 **Exploring the IB learner profile to develop global citizens**	Session 5 **Approaches to learning**	Session 9 **Inclusive learning environments and spaces**
Session 2 **International-mindedness and the role of language**	Session 6 **The inquiry process**	Session 10 **Holistic learning**
Session 3 **Transdisciplinary learning**	Session 7 **Student agency and action**	
Session 4 **Concept-driven learning**	Session 8 **The planning process and the role of the planner**	

DAY ONE	
Session 1: Exploring the IB Learner profile to develop global citizenship concepts	
Conceptual understandings	**Lines of inquiry**
Situating learning in local and global contexts supports students' understanding of human commonalities	An introduction to the PYP Developing global citizens through the learner profile
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *PYP: Principles into Practice/*The learner/Learner profile) OTHER RESOURCES Session 1 slides	WORKSHOP LEADER PDF resources in the WRC ● Session 1 Introducing personas ● Session 1 Persona challenge – Learner profile ● Session 1 Learner profile Learner profile descriptor cards
Learning engagements: Background context	
Having made introductions and gone through the necessary scene setting for the workshop, the session will give participants the opportunity to explore the PYP framework, with its emphasis on the Learner, Learning and Teaching and the Learning Community. Through exploring the relevant elements in *PYP: Principles into practice* (also referred to throughout as the 'digital resource'), participants will gain an awareness and understanding of developing global citizens using the IB Learner profile as a guide. The section of the digital resource referred to in this session is the 'IB Learner profile'. The Workshop Leader may choose to use the persona challenges to address some aspects of learning, or you may decide to include your own choice of learning engagements.	

Learning engagements	Facilitator notes/side coaching
LE 1.1 Inclusion activity Workshop Leader to host an introductory inclusion activity using a strategy such as 'Like Me' to find out about the group. Invite participants to place their chairs so they can stand up when required, then explain that you are going to make some statements. If the statement pertains to them, they stand up and say 'Just like me'. Have participants look around the room to see who stands up for each statement. You can use both professional and personal statements. **LE 1.2 Overview of the workshop** Present participants with an overview of the workshop, including the conceptual understandings and any other scheduling information. **LE 1.3 The PYP Framework** Introduce participants to the *PYP: From principles into practices*. Emphasize how the organisation of the digital publication reflects three aspects of a PYP school: • The Learner • Learning and Teaching • The Learning Community See graphic in PPT slides for session 1. Please note, the diagram is not representing the PYP framework, it is simply providing three distinct lenses for looking at and approaching the framework. Select a strategy of your choice to unpack the graphic. **Connect-Extend-Challenge** might work. Ask participants to discuss: • Which heading do you feel most strongly connected to, and why? • Which area do you feel you need to extend your understanding? • What challenges do you have in relating these three headings to your current context?	**LE 1.1** Workshop Leader, you decide on an alternative choice of inclusion activity. **LE 1.2** Please add your own workshop overview information to the PPT that you think important, for example, workshop description, areas of inquiry, approach, schedule for three days, etc. **LE 1.3** Take this time to ensure that all participants have access to the digital resource.  This graphic presents an overview of the organizing structure of the digital resource. This learning engagement is a chance to consider why the PYP has chosen to organize information about the programme using the three headings. There is an introduction or overview to the PYP curriculum framework either within or beside the digital resource. Workshop Leaders may find this a useful resource to support this engagement.

LE 1.4 Setting workshop goals Participants complete circles individually, and then discuss in table groups and write down the commonalities. It is up to you as the Workshop Leader to decide how to make use of the personas throughout the workshop. Optional engagements for the personas are included but you may choose to use school-specific challenges.	**LE 1.4** Using a printed hardcopy version of the donut diagram may help with more active sharing and discussions. Participants will return to this donut diagram at the end of the workshop. The Workshop Leader can find alternative activities to set the goals for the workshop and give agency to the participants.
LE 1.5 Introduction to Personas Briefly introduce the personas (see PPT slides) and explain that they will be used at different times throughout the workshop to pose challenges.	**LE 1.5** It is up to you as the Workshop Leader to decide how to make use of the personas throughout the workshop. Optional engagements for the personas are included but you may choose to use school-specific challenges.
LE 1.6 Gauging experience with the Learner profile (OPTIONAL) Use the following statements and a Kahoot engagement to facilitate discussion amongst participants and to their levels of experience with the Learner profile. • I know how to embed the **learner profile** into early years learning and teaching • I am aware of the importance of **international-mindedness** in the PYP. • I understand how the PYP framework and key elements of the PYP are designed to promote and strengthen **transdisciplinary learning** and teaching. • I understand the role of role of key and related **concepts** to make meaning and connections to learning and teaching. • I know how the **approaches to learning** help students think, research, communicate, socialize and manage themselves effectively. • I promote **agency** by encouraging student voice, choice and ownership. • I encourage my students to take **action** in response to their learning. • I use **inquiry** as a pedagogical approach. • I can design inclusive **learning environments** that celebrate diversity.	**LE 1.6 (OPTIONAL)** Alternatives to Kahoot include Quizalize, Socrative, Quizizz
LE 1.7 The learning community (OPTIONAL) Together the learning community: ● lives peacefully ● prioritizes people and their relationships ● assumes shared responsibility for learning, health and well-being.	**LE 1.7 (OPTIONAL)** The focus in this activity is on understanding that the PYP is implemented in an inclusive way that impacts on and involves all members of the learning community.

Give participants some time to engage with *PYP: From principles into practice*/Learning community/A community of learners/A PYP learning community, and to make connections to their current understandings of the PYP and the Learner profile. For example, table groups could read the text under the following headings and come up with a quick visual that represents the ideas expressed: • A shared commitment • Living peacefully together • Prioritizing people and their relationships **LE 1.8 Exploring the IB Learner profile** Propose a challenge related to the IB Learner profile in the school to promote understanding of the Learner profile attributes. You may choose to use the 'Optional' version below in LE 1.9. Alternatively, use cards with LP descriptors and engage participants in a matching activity, in groups. They might add to the visual created in the previous learning engagement to make connections between the Learner profile and to the impact and involvement of the learning community in the PYP. **LE 1.9 Learner profile challenge (OPTIONAL)** Instead of, or in addition to LE 1.8, you may choose to use this 'Optional' engagement using the Persona challenges in the slide deck and PDF resources. In table groups – choose either Toni or Hussain or a scenario set by the Workshop Leader to discuss with the group (5 minutes to discuss and 5 minutes for whole group feedback). Synthesize the key messages into a communication to share with the participants' school communities (for example, tri-fold leaflet, a post on the school website, an email, communication to parents, a slideshow presentation etc.).	**LE 1.8** If choosing the alternative suggestion, prepare cards with IB Learner profile descriptors for matching activity. Identify how they relate to each attribute, perhaps using four corners, or diamond ranking activity.
Feedback and reflections	
Workshop Leader, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
BREAK	

DAY ONE	
Session 2: International mindedness and the role of language	
Conceptual understandings	**Lines of inquiry**
Situating learning in local and global contexts supports students' understanding of human commonalities	● Embedding International mindedness into learning and teaching ● Language as a vehicle to identify human commonalities
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *PYP: From principles into practice*/Learning community/International-mindedness OTHER RESOURCES Session 2 slides	WORKSHOP LEADER PDF resources on WRC ● Session 2 Persona challenge – International-mindedness Create for sharing (hard copy or digital) ● Connect-Extend-Challenge chart ● Circle of viewpoints chart ● Compass point signs
Learning engagements: Background context	
Session 2 takes us into embedding international mindedness into learning and teaching. We also explore language as a vehicle to identify human commonalities. The session is an opportunity to consider how developing language is core to the need to communicate. To support the suggested learning experiences, there is a range of material from *PYP: Principles into practice* to be explored (refer to Learning community/International-mindedness): ● Developing international-mindedness; ● Fostering the development of international mindedness; ● Providing professional development; ● Making provisions for language learning; ● Infusing international mindedness within the PYP framework; ● Expanding cultural understanding to extra-curricular activities;	

- Celebrating diversity;
- Engaging with and building relationships in the school community.

We have suggested grouping participants to share the reading load, with readings dependent on the learning experiences that have been suggested. Please base the readings around how you decide to structure the learning engagements.

Learning engagements	Facilitation notes/side coaching
LE 2.1 What is international-mindedness? See PPT for IB mission statement. Give participants a couple of minutes to read through. If time allows, you could try 1 word, 1 phrase, 1 sentence to share immediate thoughts on the IB mission statement. Invite participants to engage in table discussion around their current understanding of what international-mindedness looks like (and doesn't look like) in their schools. **LE 2.2 Mission Statements** Participants consider the similarities and differences between the mission statements of their school and that of the IB. Discuss the similarities and differences in their table group. **LE 2.3 Readings** Allocate groups to read the following sections from the digital resource (refer to Learning community/International-mindedness) Group 1 ● Developing international-mindedness ● Fostering the development of international mindedness Group 2 ● Providing professional development ● Making provisions for language learning ● Infusing international mindedness within the PYP framework ● Expanding cultural understanding to extra-curricular activities Group 3 ● Celebrating diversity ● Engaging with and building relationships in the school community	**LE 2.2** Some schools may have something other than a mission statement, e.g. motto, values, vision statement. **LE 2.3** Groups to 'jigsaw' reading sections from *PYP: Principles into practice.* Workshop Leader could choose an alternative strategy to promote discussion. Signs for 'Compass Points' will need to be prepared if you are using the suggestion to use this particular thinking routine.

Using the Compass Points thinking routine, each group reports back. **LE 2.4 Planning for international-mindedness (OPTIONAL)** EITHER: Discuss and respond to one of the persona challenges OR: Develop a plan of things participants could implement in their classroom or school to embed international-mindedness. • Can you make this change alone? • Who might you need to collaborate with? • Is this a short-term strategy or a long-term strategy? • How will you know it is working? **LE 2.5 Language in the PYP** In *PYP: Principles into Practice,* engage participants with Language (in Learning and teaching/Language) to explore the question, how does language support transdisciplinary learning? ***Either individually*** Use the Connect-Extend-Challenge Chart to consider and give feedback on the following, noting the ideas participants connect with their setting: ● How is your thinking extended by the reading? ● What challenges are provoked through the reading? Participants discuss thoughts with their table group. ***Or as a group*** As an alternative to the Connect-Extend-Challenge, use the Circle of View Points routine to incorporate the learner, learning and teaching and the learning community perspectives. Circle could be made up of student, teacher and parent viewpoints. **LE 2.6 The role of language (OPTIONAL)** Participants think about how children's literature can be used to support language acquisition and consider the support that parents can offer for children to develop their language skills. How could children's literature be used to promote language acquisition? What role do parents play at home?	**LE 2.4** Participants have the choice to respond to a persona or think about how they might make a plan for their own setting. The questions are there as a prompt. **LE 2.5** The graphic in the PPT might provide a jumping off point for the readings about language and the role it plays in a concept-driven, transdisciplinary programme. There are other graphics and information in the digital resource that might also be useful provocations, including an image of Multimodality in the technology section of the digital resource (refer to Learning community/Technology in the PYP/Technology in learning and teaching/ and the TSM "Translanguaging". Use either Connect-Extend-Challenge or Circle of Viewpoints thinking routines to explore how developing language is core to the need to communicate. **LE 2.6** Depending on your audience, Workshop Leaders might like to introduce some children's literature to this session as a way to make connections between the role language plays in developing international-mindedness and development of literacy.

Design a flyer that can be shared with parents about the importance of encouraging a love of language and reading. **LE 2.7 (OPTIONAL)** Workshop leaders might like to use the three circle graphic of international-mindedness (see PPT slides) to support reflection point for this session.	
Feedback and reflections	
Workshop Leader, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
LUNCH	

DAY ONE	
Session 3: Transdisciplinary learning	
Conceptual understandings	**Lines of inquiry**
Transdisciplinary learning design deepens students' understanding of complex ideas	Transdisciplinary learning
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *PYP: Principles into Practice* ● Learning and teaching/A transdisciplinary programme of inquiry/Developing a transdisciplinary programme ● Learning and teaching/Transdisciplinary learning/Overview/A model of transdisciplinary learning ● Learning and teaching/Transdisciplinary learning/Overview/Characteristics of the PYP framework. OTHER RESOURCES Session 3 slides	WORKSHOP LEADER For matching activity, make strips with the transdisciplinary theme title and separate sentences with the descriptors.
Learning engagements: Background context	
Transdisciplinary learning in the PYP conveys learning that has relevance between, across and beyond subjects and transcends borders that confine them to connect to what is real in the world. (*PYP: From principles into practice)* We now move into transdisciplinary themes and learning in a transdisciplinary framework. Transdisciplinary learning is core to the PYP philosophy. In this session, we shall reflect on what transdisciplinary learning can look like in the participants' settings. The readings to focus on are: *PYP: From principles into practice* Learning and teaching/A transdisciplinary programme of inquiry/Developing a transdisciplinary programme	

Learning and teaching/Transdisciplinary learning/Overview/A model of transdisciplinary learning
Learning and teaching/Transdisciplinary learning/Overview/Characteristics of the PYP framework.

This session is focused on collaborative learning. We have suggested a **Pair-Square** strategy to work collaboratively. Workshop Leader, please go ahead and base the groupings around your chosen grouping/collaborative strategies.

Learning engagements	Facilitation notes/side coaching
LE 3.1 Transdisciplinary themes: Matching activity Have some participants take the transdisciplinary theme title and others the descriptor of the transdisciplinary theme. They undertake a walkabout to match the title with the descriptor.	**LE 3.1** Make transdisciplinary titles and the descriptors.
LE 3.2 Reflect on transdisciplinary learning in your context Use sentence strips for participants to individually write their own definitions of what transdisciplinary learning is. Then repeat in Pair (first in twos) and then repeat in Square (move into groups of four). Compare definitions and discuss the following: ● What does transdisciplinary learning look like in your classroom currently? ● How do you know that transdisciplinary learning is taking place? ● How do you think you assess transdisciplinary learning? ● What needs to change as you develop an upcoming unit of inquiry? ● How will you implement the changes in collaboration with your team? Collate sentence strips into one composite, share, and talk about how thinking has changed.	**LE 3.2** Use the regrouping strategy of your choice if you prefer.
LE 3.3 Readings Using the digital resource, participants work with their final four square group from LE 3.2. and dip into the following from the digital resource:	**LE 3.3** Direct participants to digital resource for these readings. Use Jigsaw strategy for the readings.

PYP: From principles into practice ● Learning and teaching/A transdisciplinary programme of inquiry/Developing a transdisciplinary programme ● Learning and teaching/Transdisciplinary learning/Overview/A model of transdisciplinary learning ● Learning and teaching/Transdisciplinary learning/Overview/Characteristics of the PYP framework. Now look at the new group sentence. Does the group wish to keep it or change it in the light of the reading? Use the Popcorn strategy or the Most Important Point (MIP) for sharing.	Use either of the following for sharing: ○ Popcorn sharing strategy (https://www.originsonline.org/popcorn-share) ○ The Most Important Point – an example of a strategy that you might like to have the participants identify in their highlights (http://www.thinkingcollaborative.com/wp-content/uploads/2016/10/Most-Important-Point-MIP.pdf)
Feedback and reflections	
Workshop Leader, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
BREAK	

DAY ONE	
Session 4: Concept-driven learning	
Conceptual understandings	**Lines of inquiry**
Transdisciplinary learning design deepens students' understanding of complex ideas	A concept-driven curriculum
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *PYP: Principles into practice/*Learning and teaching/Concepts Home reading *PYP: Principles into practice/*The learner/Action *PYP: Principles into practice/* The learner/Learner agency OTHER RESOURCES Session 4 slides	WORKSHOP LEADER PDF resources on WRC • 'Concept or fact?' Provide: • 7 Key concepts (Figure CO01) printed for participants' reference. • Large paper sheets – one per transdisciplinary theme • Markers • Glue/blutack to display sheets.
Learning engagements: Background context	
In session 4, we shall be thinking about concept-driven learning. This is a time for participants to consider what they know and what conceptual learning looks like in their setting. There will be the opportunity to think about key and related concepts. Please refer participants to *PYP: Principles into practice/*Learning and teaching/Concepts. Using the information shared, including a Powtoon, participants can engage with developing conceptually based central ideas.	

Learning engagements	Facilitation notes/side coaching
LE 4.1 What does concept-driven learning look like? As a table group, participants write down your ideas of what concept-driven learning looks like. In groups of 4, they read selected parts of the Concepts section in the digital resource: • A concept-driven curriculum • Concepts • Key concepts • Related concepts • From concepts to conceptual understandings. **LE 4.2 Key and related concepts** Allocate a transdisciplinary theme to each group (6 groups). Participants then look at the table for Seven key concepts in *PYP: Principles into practice (*refer to Concepts/Concepts and conceptual understanding/A concept-driven curriculum/Key concepts) and allocate the most relevant concepts for their theme. Using each of the seven key concepts as a starting point, participants then determine the possible related concepts that would fit under the transdisciplinary theme. Refer to the digital resource and the scope and sequence documentation for examples of related concepts. **LE 4.3 Concept or fact sorting activity (OPTIONAL)** Refer to Session 4 Slides for the sorting activity involving these concepts: Conflict, family, culture, minibeasts, change, fitness, human rights, China, persuasion, power, revolution, model, dinosaurs, cooperation, presidential elections, extinction, World War II, transportation, area and perimeter, evolution, the human body, verb conjugation, fractions, the rainforest, earthquakes, identity, water, citizenship, simple machines, laws and rules, probability.	**LE 4.1** • *PYP: Principles into practice* – 7 Key Concepts (Figure CO01) printed for participants' reference. **LE 4.2** Have the Transdisciplinary theme descriptors printed and available for the groups. Have the figure of key concepts printed for participants' reference. You might find it useful to read up on the concept work of Lynn Erickson in order to support this engagement. See IB position paper by Erickson, *Concept-based teaching and learning* (IBO, 2012) as a starting point.

LE 4.4 Powtoon View Powtoon link in PowerPoint about creating central ideas from concepts. (https://youtu.be/UmVE3GiwlEc) **LE 4.5 Central ideas** Participants write a central idea for the transdisciplinary theme they have been working on in their groups, using the related concepts they have identified. Post up the sheets. There are suggested home readings in *PYP: Principles into practice* in preparation for tomorrow's sessions both of which sit under The learner section of the digital resource. ● Learner agency ● Action	**LE 4.4** Have Powtoon available to be viewed. **LE 4.5** Use Bus Stop or another similar approach to share/view all the transdisciplinary themes. With participants, walk around the room of posted themes and add comments and suggestions to the other groups on how they might strengthen their central idea.
Feedback and reflections	
Workshop Leader, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
END OF DAY 1	

DAY TWO	
Session 5: Approaches to learning	
Conceptual understandings	**Lines of inquiry**
Transdisciplinary learning design deepens students' understanding of complex ideas	Approaches to learning
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES • TSM: Explicitly teaching thinking skills • Sharing PYP: Developing approaches to learning (http://blogs.ibo.org/sharingpyp/2017/10/10/developing-approaches-to-learning-atl/) • *PYP: From principles into practice*/The learner/The early learner/Approaches to learning in the early years (for EY educators) • *PYP: From principles into practice*/Learning and teaching/Approaches to learning (for all educators) OTHER RESOURCES Session 5 slides	WORKSHOP LEADER PDF resources on WRC • Session 5 Ladder diagram • Session 5 Persona challenge – Approaches to learning • Text copy of Sharing PYP: Developing approaches to learning ATL Categories and sub-skills (printed)
Learning engagements: Background context	
The foci for this session are the approaches to learning and approaches to teaching that are crucial for exploring subject knowledge in context with the transdisciplinary themes. There is the opportunity to consider the five categories of skills and the associated sub-skills. A Sharing PYP blog post and a PYP TSM are included in this session to help inform understanding about the approaches to learning and how they are realized in schools. Participants gain some insight into how one educator encourages critical thinking and problem solving. There is also the opportunity for participants to consider the categories of skills and sub-skills that are included in their setting. Using the thinking routine, **Think-Puzzle-Explore**, participants can delve in a bit further into ATL.	

There is an option to either use the challenges posed by the personas or to set up your preferred challenge/inquiry for the participants to follow.

Learning engagements	Facilitation notes/side coaching
LE 5.1 Looking into the ATL Explore the ATL categories and various sub-skills available for groups to sort: ● Divide up the cohort into 5 groups (each representing a category) ● Have the statements for each category available for the category group to identify and place against their category. Groups to read 'Sharing the PYP blog post: Developing approaches to learning'. Participants to view the TSM, 'Explicitly teaching thinking skills'. Although this is about one category, it could still provide a starting point for talking about how to promote other categories in learning and teaching. Participants explore and respond to the question: How would you promote the sub-skills for your category in any unit of inquiry? **LE 5.2 (OPTIONAL)** You **c**ould choose to do this as **Think-Puzzle-Explore**: 1. What do you **think** you know about this topic? 2. What questions or **puzzles** do you have? 3. How can you **explore** this topic? **LE 5.3 Persona Challenges** In table groups, participants think about the challenges (outlined in the slides), faced by Mario, Andrea, Toni and Hussain. Identify one of the personas they would like to respond to, based on some of the challenges that align with their own context. From their teaching experience, participants come up with ideas to support the development of the ATL through inquiry. ● Reflecting on your experience, provide responses to the challenges faced by your chosen persona.	**LE 5.1** Draw participants attention to the ATL sections in the digital resource - • *PYP: From principles into practice*/The learner/The early learner/Approaches to learning in the early years (for EY educators) • *PYP: From principles into practice*/Learning and teaching/Approaches to learning (for all educators) Have the ATL categories printed and the various sub-skills cut up and available for the ATL groups to sort. Note, the subskills of ATL for EY differ slightly. Workshop Leader might use: Sharing PYP blog post 'Developing approaches to learning' (http://blogs.ibo.org/sharingpyp/2017/10/10/developing-approaches-to-learning-atl)

● Add notes which represent the current situation your persona is facing (use the box at the lower section of the ladder). ● Brainstorm ideas which represent a desired situation or 'the bigger picture' he or she would like to see happening (use the box at the upper section of the ladder). ● Identify forces that could help the growth of the ATL and place these outside the upper left side of the ladder. ● In the lower right section outside the ladder, identify and list the forces which may inhibit the resolution of the challenges faced by your chosen persona. ● Select and highlight the top one or two issues that will need to be worked on if the desired state is to be achieved.	**LE 5.3** Workshop Leader to either use the persona challenges for participants to explore the ATLs, or devise another learning experience, for example, set up your own challenge/inquiry for participants to follow that will give them a deeper insight into the ATL in action in a transdisciplinary setting. Have the Ladder diagram printed and available for participants or leave image in PowerPoint visible.
Feedback and reflections	
Workshop Leader, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
BREAK	

DAY TWO	
Session 6: The inquiry process	
Conceptual understandings	**Lines of inquiry**
Collaborative relationships support well-being	The inquiry process as a vehicle for learning and teaching
Resources to support engagement	**Additional materials, resources or examples that could be provided by the workshop leader or participant**
IB RESOURCES *PYP: Principles into practice* o Learning and teaching/Inquiry/Inquiry in the PYP o Learning and teaching/Assessment OTHER RESOURCES Slides for Session 6	WORKSHOP LEADER PDF resources on WRC • Session 6 - Persona challenge Create online workshop space (blog, google site, etc.)
Learning engagements: Background context	
During this session, inquiry as the main vehicle for learning and teaching will be the focus. As educators, we want to understand the depth and breadth of learning that inquiry facilitates. Keep in mind that inquiry can be perceived and organized in many, many different ways. It is really important that the learning environment reflects strongly a culture of inquiry. There is no one set process or model or cycle that the PYP prefers. This session has been organized around the personas, with each persona laying out their challenge involving an aspect of inquiry processes in their setting. Toni has a query about differentiation being reinforced through inquiry, to stimulate a range of learners. Andrea wants to convey the richness of inquiry learning through the inquiry to parents of students in the early years of learning (3-6 years). In response to the challenges set by the personas, it is proposed that participants write a blog or develop another communication for an online platform of choice. If you set up an online environment or platform for your workshop, encourage postings to be made here. If preferred, the Workshop Leader may choose to set up different non-persona learning engagements that suit the workshop participants and that dig deeper into how inquiry learning supports learning in the PYP.	

Learning engagements	Facilitation notes/side coaching
LE 6.1 Persona Challenge **LE 6.2 Reading: Inquiry in the PYP** LE 6.1 Read the persona challenge on either the slides or PDF resource. LE 6.2 Read and explore *PYP: Principles into practice* • Learning and teaching/Inquiry/Inquiry in the PYP • Learning and teaching/Assessment	**LE 6.1 and LE 6.2** Access to the reading is required to respond to the persona challenge. The indicated readings support participants to respond to one of the personas.
LE 6.3 Respond to the persona challenge Having read Toni and Andrea's dilemmas, participants, in pairs choose one of the personas to address their concerns. They are to use the digital resource section on Inquiry, along with their own experience, to suggest a sustainable resolution for them. Participants think about how they might convey information to develop awareness, understanding and appreciation of the powerful impact of inquiry learning. They then compose a blog post that disseminates relevant information to open up either parent or teacher thinking. The blog is to describe, from their perspective, how conceptual understanding through inquiry can be monitored, documented and assessed. Participants add blog posts to the shared workshop space. Participants to read the blog posts of other participants and see what ideas could apply in their own school context to enable students to have more agency in the inquiry process. **LE 6.4 Stir the Classroom (OPTIONAL)** 1. Each pair is assigned either number 1 or number 2. 2. Groups of two pairs to be made. with a number 1 and a number 2. Each group of 4 stands together to form a circle of groups around the room. 3. They debrief to each other about the ideas from the responses to Toni and Andrea that could be applied in their school setting. 4. Then move the number 1s on to the next group. 5. They de-brief to the number 2s they join. 6. Then move the number 2s on to the next group.	**LE 6.3** The Workshop Leader to decide what tool would be most appropriate to use. If the Workshop Leader has already set up a blog or another kind of workshop platform/space, it is a simple matter to have participants post onto the existing blog or space. The tool may need to be different, depending on your workshop platform/space.

7. They debrief to the number 1s they join. 8. When all pairs have debriefed to other pairs, the engagement is complete.	
Feedback and reflections	
Workshop Leader, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
LUNCH	

DAY TWO	
Session 7: Student agency and action	
Conceptual understandings	**Lines of inquiry**
Collaborative relationships support well-being	Student agency reflected in student action
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *PYP: From principles into practice:* • The learner/Learner agency • The learner/Action • Learning and teaching/Assessment OTHER RESOURCES Session 7 slides	WORKSHOP LEADER PDF resources on WRC • Session 7 Persona challenge – Agency and action Some poster tools, such as Canva, Padlet, etc. Poster paper, markers, glue, blutack, etc. if hard copy posters to be developed.

Learning engagements: Background context

Our inquiry moves to student agency and action. We explore how to share the responsibility for learning, health and well-being. Agency is the power to take meaningful and intentional action, and acknowledges the rights and responsibilities of the individual. Agency supports voice, choice and ownership for everyone in the learning community. Students with agency have voice, choice and ownership; and a propensity to take action.

This session begins with an exploration of *PYP: Principles into practice/*The learner
- Learner Agency
- Action

The focus is again around persona challenges and offers the option to explore what is happening in participants' settings. Participants are encouraged to work in pairs to either address persona concerns or inquire into their own concerns. If you have another way to engage with this line of inquiry, please adjust the learning engagements to reflect your context.

Learning engagements	Facilitation notes/side coaching
LE 7.1 Readings Participants read and explore *PYP: Principles Into practice*: • The learner/Learner agency • The learner/Action • Learning and teaching/Assessment - already read as part of session 5. **LE 7.2 Persona challenge** • Participants individually review Mario and Hussain's comments. • Participants pair up with a like-minded person – come up with suggestions, strategies or ideas for how to address their concerns. Discuss how the readings from LE 7.1 might support a response to the challenge posed by the persona selected. • Participants create a poster or some other visual representation to share the suggestions for their setting that would help the learning community comprehend agency. They consider the questions below in formulating a poster. o What short-term or long-term goals might you have for developing student agency? o How will you assess success in this area? o Which strategies might you consider for supporting students to take action? o Who from your learning community can support you? • Participants undertake a gallery/virtual walk to read through the comments of others and consider how the suggestions, strategies, and ideas shared might be useful in their school.	**LE 7.1** If this was done for home reading at the end of Day 1, you might consider a brief reflection activity or routine to help summarise the readings, for example, collaborative PMI, popcorn sharing. **LE 7.2** Pair up participants through your choice of method. If participants use an online tool for creating posters (Canva, Poster. My Wall), they could post a link to this in a virtual space such as Padlet.
Feedback and reflections	
Workshop Leaders, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
BREAK	

DAY TWO	
Session 8: The planning process and the role of the planner	
Conceptual understandings	**Lines of inquiry**
Collaborative relationships support well-being	The collaborative planning process and the role of the planner
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *PYP: Principles into practice/*Learning and teaching/A transdisciplinary programme of inquiry/Developing a transdisciplinary programme/Collaboratively designing a programme of inquiry/Collaboratively developing units of inquiry and The PYP planning process and planners *What is an IB education*, IBO, 2017 (optional) OTHER RESOURCES Session 8 slides	WORKSHOP LEADER PDF resource on WRC • Session 8 Sample central ideas Printed copies of blank planner template from PRC (A3 size - bigger if possible)
Learning engagements: Background context	
Collaboration is a central tenet of the PYP. *A collaborative approach involves sustained dialogue and reflection among and between all members of the learning community. This approach helps all members of the learning community to grow as learners and as professionals to improve student outcomes, health and well-being.* (*PYP: From principles into practice*) *PYP: Principles into practice* supports the learning in this module through the sections on: • Learning and teaching/A transdisciplinary programme of inquiry/Developing a transdisciplinary programme/Collaboratively designing a programme of inquiry/Collaboratively developing units of inquiry and The PYP planning process and planners.	

As part of the learning in this session, we will look into the concept of central ideas and determine their global significance. Working in groups, participants can analyse from a given selection of central ideas.

There is the chance to look at the IB developed planners, whilst remembering that schools are free to develop their own planners so long as they reflect the PYP planning process outlined in the digital resource. Please note, at the time this workshop plan was being developed, the final unit of inquiry planning templates were still in development by the IB. It will be important that you become familiar with the resulting templates and build their use into this learning engagement.

Learning engagements	Facilitation notes/side coaching
LE 8.1 Readings Participants explore *PYP: Principles into practice/*Learning and teaching/A transdisciplinary programme of inquiry/Developing a transdisciplinary programme/Collaboratively designing a programme of inquiry/Collaboratively developing units of inquiry and The PYP planning process and planners Central ideas are to be globally significant. They are written to invite and provoke student inquiry. A selection of central ideas is provided (see PDF resources and slide deck). **LE 8.2 Central ideas** Participants to: • Analyse the sample central ideas to determine if they are globally significant and invite student inquiry. • If they do not provoke enduring understanding, re-work the central ideas to get them to fit the criteria of a good central idea • Choose two key concepts and develop the related concepts and the lines of inquiry • Explore the rest of the planner and zoom in on the assessments • In groups, devise the relevant assessments and note into the planner • Discuss different ways of monitoring and supporting student learning through assessment.	**LE 8.1** Workshop Leader to choose the method/strategy to unpack the readings. **LE 8.2** Central ideas: We often hear the terms – broad, timeless, universal, abstract – when talking about central ideas. Workshop Leader, please make sure these terms are unpacked/understood rather than leaving them standing on their own. Central ideas are globally significant and invite student inquiry. In developing or revising a central idea, consider the following questions: • Does it offer students opportunities to explore the commonalities of the human experience? • Does it promote the associated conceptual understanding? • Is it broad enough to offer multiple lines of inquiry? • Is it underpinned by concepts (for example, key and related concepts)?

LE 8.3 Reflecting on collaboration Participants to take a moment to think about how they collaborated with others throughout the day. • What did you find easy? • What did you find more challenging? • What understanding of collaboration will you take back to apply in your own setting? OVERNIGHT HOME LEARNING - **OPTIONAL** Read through the *What is an IB education,* IB0, 2017.	• Is it relevant to students in all cultures and contexts? • Will it engage students in thinking critically and creatively? • Does it present an opportunity for students to co-construct meaning of the conceptual understandings being explored? • Is it open to a range of student responses? • Is it written in a neutral voice? The sample central ideas are in the PDF resources and in the slide deck. Divide participants into groups for this work.
Feedback and reflections	
Workshop Leaders, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
END OF DAY 2	

DAY THREE	
Session 9: Inclusive learning environments and spaces	
Conceptual understandings	**Lines of inquiry**
Diverse ways of knowing, doing and thinking are supported by well-designed learning environments	Inclusive learning environments and spaces
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *PYP: Principles into practice* The learning community/Learning environments IB Community blog post – A room with a view to learning http://blogs.ibo.org/blog/2015/12/19/a-room-with-a-view-to-learning OTHER RESOURCES Session 9 slides	WORKSHOP LEADER PDF resources on WRC • Session 9 Persona challenge – Environments and spaces • IB Community blog – A room with a view to learning Ideas for digital tools for learning space designs, such as gliffy, google draw For hand-drawn designs, need hard materials such as paper, markers, glue/blutack.
Learning engagements: Background context	
It is time for the focus to shift to learning environments and spaces. Begin by unpacking the PYP 'Connecting pedagogy and design' graphic in the Learning community section of *PYP: Principles into practice*. The approach chosen to unpack the graphic will be determined by the Workshop Leader. We will then move to the challenges posed by our personas, or to participants' own challenges around learning environment and spaces There are readings and a blog to support this session: • *PYP: Principles into practice* –The learning community/Learning environments • Sharing PYP blog post http://blogs.ibo.org/blog/2015/12/19/a-room-with-a-view-to-learning	

Learning engagements	Facilitation notes/side coaching
LE 9.1 Connecting pedagogy and design Use the strategy 'I used to think, now I think' with participants to engage with matters of learning environments and spaces. For 'I used to think…', participants view the diagram in The Learning community section of the digital resource. From this diagram, discuss: What key messages come through to you? How would explain this diagram to someone else? What questions does it raise? For 'Now I think', participants add their thoughts after engaging with the following readings. Note, if working in groups, assign different sections to be read by different group members. Readings • *PYP: Principles into practice* - The learning community/Learning environments • Sharing PYP blog post http://blogs.ibo.org/blog/2015/12/19/a-room-with-a-view-to-learning	**LE 9.1** The graphic is to be unpacked (see session 9 slides for graphic). The 'I used to think/now I think' strategy is suggested, but the Workshop Leader can use a strategy more appropriate to the context. Participants can work individually or in table groups to complete the LE. Responses/ thinking can be recorded either on chart paper for groups, or in own spaces for individual.
LE 9.2 Persona Challenge Time now to have a look at the queries posed by our personas. Either explore these concerns, or participants to think about the learning environment and spaces in their settings. Think about how best to co-construct: • Learning spaces in which the children may interact with ease • A learning environment that offers favourable situations for purposeful play • The chances to provoke and stimulate independence and responsibility • Spaces to provide for agentic learning. ***EITHER*** Form groups of 3–4 people for each of the personas. Participants choose which group they wish to work with. Create a drawing of a design for a new learning space for either Mario, Hussain or Andrea.	**LE 9.2** Workshop Leader can decide on groupings. EITHER use persona challenges OR have participants bring their own concerns to the group for discussion and redesign. Participants might like to suggest Google Drawing or Gliffy as a tool to design the plans, or to draw them on a piece of paper.

OR Participants can bring their own challenges and work on them individually or in groups. **LE 9.3 Elevator Pitch** Once participants have designed their new learning environment, as a group create an elevator pitch to present to a Board of Governors to request funding and development for the new space.	**LE 9.3** Present pitches - either as individuals or a collective.
Feedback and reflections	
Workshop Leaders, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.	
BREAK	

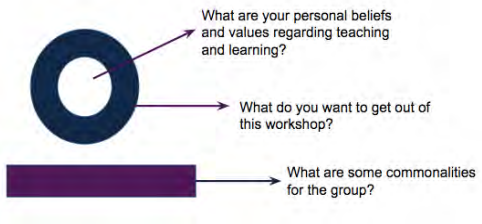
DAY THREE	
Session 10: Holistic learning	
Conceptual understandings	**Lines of inquiry**
Diverse ways of knowing, doing and thinking are supported by well-designed learning environments	Holistic learning Approaches to teaching Our next steps
Resources to support engagement	**Additional materials, resources or examples that could be provided by the Workshop Leader or participant**
IB RESOURCES *What is an IB education?* (IBO, 2017) OTHER RESOURCES Session 10 slides	WORKSHOP LEADER • PYP Approaches to Teaching (see PDF resources on WRC) • A shared digital space, e.g. padlet • Post it notes for wrapping up. • Donut diagrams from session 1
Learning engagements: Background context	
In this final session we will look at the IB Approaches to teaching. Learning and teaching are finely balanced to ensure an inquiry-based approach. The approaches to teaching have been designed to give flexibility to educators as they devise and choose the teaching strategies that are suitable for their settings. There is an opportunity in this session for participants to have a look at the kind of capabilities and practices required of a PYP teacher and to identify with them. We will bring together the learning in the workshop by designing a visual metaphor that encapsulates the PYP learning experience. Finally, we revisit the Donut diagram from Session 1 to close the workshop. Note that a padlet, or other collaborative space, is required for this session.	

Learning engagements	Facilitation notes/side coaching
LE 10.1 Approaches to teaching Use Think - Pair - Share or another way of having participants discuss approaches to teaching identified by the IB (see more in *What is an IB education*, 2017). Based on prior knowledge and this workshop, what do they understand is meant by: • Based on inquiry • Focused on conceptual understanding • Developed in local and global contexts • Focused on effective teamwork and collaboration • Designed to remove barriers to learning • Informed by assessment?	**LE 10.1** Think-Pair-Share, Concentric circles, or another discussion strategy can be used to have participants share what they understand of the approaches to teaching and how they connect to the prior learning in this workshop and to their experience in the classroom.
LE 10.2 Teacher capabilities Participants to select two teacher capabilities (see session 10 slides), based on the IB approaches to teaching that they would like to focus on developing in their classroom or school at the conclusion of this workshop. Ask participants to: 1. Consider what success in these areas might look like and what approaches you could use to continue learning post workshop. 2. Consider what evidence would demonstrate your growth as a PYP teacher. 3. Find a partner and exchange email addresses. Plan on a date for emailing or Skyping to check in on progress.	**LE 10.2** Refer to the slides and choose capabilities as per the LE instructions. Participants pair up and make a plan for contact beyond the workshop to update the other person on the progress they have made on the capabilities.
LE 10.3 A visual metaphor (OPTIONAL) Participants to: 1. Review the graphic that shows the three components of the PYP - the Learner, Learning and Teaching and the Learning Community. 2. Individually, consider the elements that have been explored throughout this workshop and how they could fit together into a visual metaphor. 3. Construct their own visual representation (for example, a collage of images, a diagram or a mindmap) of how they see the PYP as a holistic, transdisciplinary and coherent learning experience.	**LE 10.3 (OPTIONAL)** Workshop padlet or collaborative sharing space needed for this learning engagement. 

4. Post their 'map' into the workshop padlet. They then have a bank of thoughts for future consideration.

LE 10.4 Workshop expectations – 'gots' and 'wants'

Revisit the donut diagram from Day 1 to reflect on how workshop expectations were met.



Individually (on post-its), participants identify up to 3 'gots' and 3 'wants' with regard to the workshop outcomes. Discuss as a table group. Choose the commonalities and post these onto the Got/Want section of the workshop blog.

At the end of the workshop, as part of the wrap up, you might like to use this video from the IB about agentic learners in the PYP: https://vimeo.com/150154406

LE 10.4

Workshop Leader, you can use the suggested learning engagements or create your own to wrap up the workshop.

Feedback and reflections

Workshop Leaders, please note here any reflections you have on this engagement for future thinking, for example, timing, approach, content, context statement, engagement by participants, suggestions for improvement.

END OF DAY 3

Supports for student content and skill development

The International Baccalaureate Primary Years Programme (IB PYP) is designed for students aged 3 to 12 and focuses on the development of the whole child. The PYP can either be a stand-alone early childhood center offering pre-K, an early childhood program connected to a PYP, or a typical elementary school that starts with kindergarten. Here's an overview of how the IB PYP works, including the role of language:

- **Transdisciplinary Framework:** The IB PYP is organized around six transdisciplinary themes that provide a framework for inquiry-based learning. These themes are globally significant and encourage students to make connections across different subject areas. The six transdisciplinary themes are: Who we are, Where we are in place and time, How we express ourselves, How the world works, How we organize ourselves, and Sharing the planet.
- **Inquiry-Based Learning:** Inquiry is at the heart of the IB PYP. Students are encouraged to ask questions, explore concepts, and investigate real-world issues. Teachers facilitate inquiry-based learning experiences that promote curiosity, critical thinking, and problem-solving skills.
- **Conceptual Understanding:** The IB PYP emphasizes the development of conceptual understanding across subject areas. Concepts such as form, function, causation, change, and connection are explored in depth, helping students develop a deeper understanding of key ideas and themes.
- **Learner Profile:** The IB PYP promotes the development of the IB Learner Profile attributes, which include being principled, open-minded, reflective, and caring, among others. These attributes guide students in becoming responsible global citizens who demonstrate empathy, respect, and a commitment to making a positive difference in the world.
- **Language Development:** Language is a fundamental aspect of the IB PYP and is integrated throughout the curriculum. Language development occurs in multiple ways, including listening, speaking, reading, writing, and viewing. Students engage with language in various contexts, including during inquiry-based activities, collaborative projects, and reflection exercises. Many PYPs offer instruction in bilingual and/or trilingual settings.
- **Language of Instruction:** The language of instruction in the IB PYP may vary depending on the linguistic and cultural context of the school. In multilingual schools, students may have the opportunity to learn and use more than one language, fostering linguistic diversity and intercultural understanding.
- **Transdisciplinary Approach:** Language learning is integrated into the transdisciplinary themes and inquiry-based learning experiences in the IB PYP. Students use language to inquire, communicate, and express their ideas and perspectives across different subject areas and contexts.

Overall, language development is a central component of the IB PYP, supporting students in becoming effective communicators, critical thinkers, and lifelong learners who can engage with the world in meaningful ways.

EXPERIENCE AND REFERENCES

Organization Background

Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s).

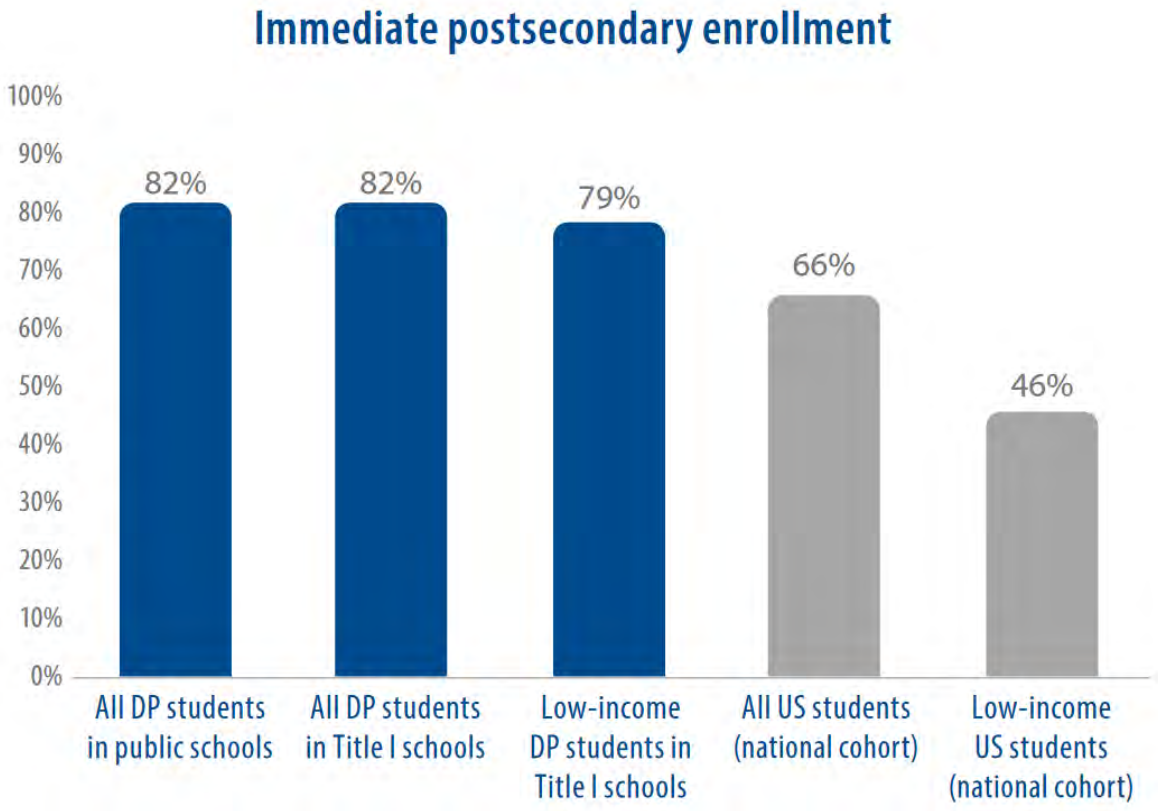
The International Baccalaureate has its roots in 1924 with the founding of the International School of Geneva, and formalized as an education non-profit in 1968, offering the first internationally recognized diploma in the world. Since that time, the IB now operates in over 160 countries and supports over 6,000 schools globally. The first IB school in the United States was authorized in 1971. Since then, IB has grown to 1,924 authorized schools; 2,461 programs; and 161 programs in Candidacy. Ninety-one percent of IB schools in the US are public schools, and this market share has been consistent for more than a decade. Between 60% and 73% of IB public schools in the US qualify for US federal title funds and leverage title funds to administer IB programs. On the other hand, 9% of IB schools in the US are independent, including some of the most recognized and prestigious schools in the US, including the United Nations International School (the first US IB school), the Dwight School, and Washington International School. Consequently, the IB sustains and enhances a vast spectrum of US schools overall, from prestigious independent schools, to public and charter schools, to schools receiving federal funds based on poverty metrics. Currently, the IB has regional offices in Washington, D.C.; Singapore; and Cardiff, Wales; with headquarters in Geneva Switzerland (Legal Office) and The Hague, Netherlands.

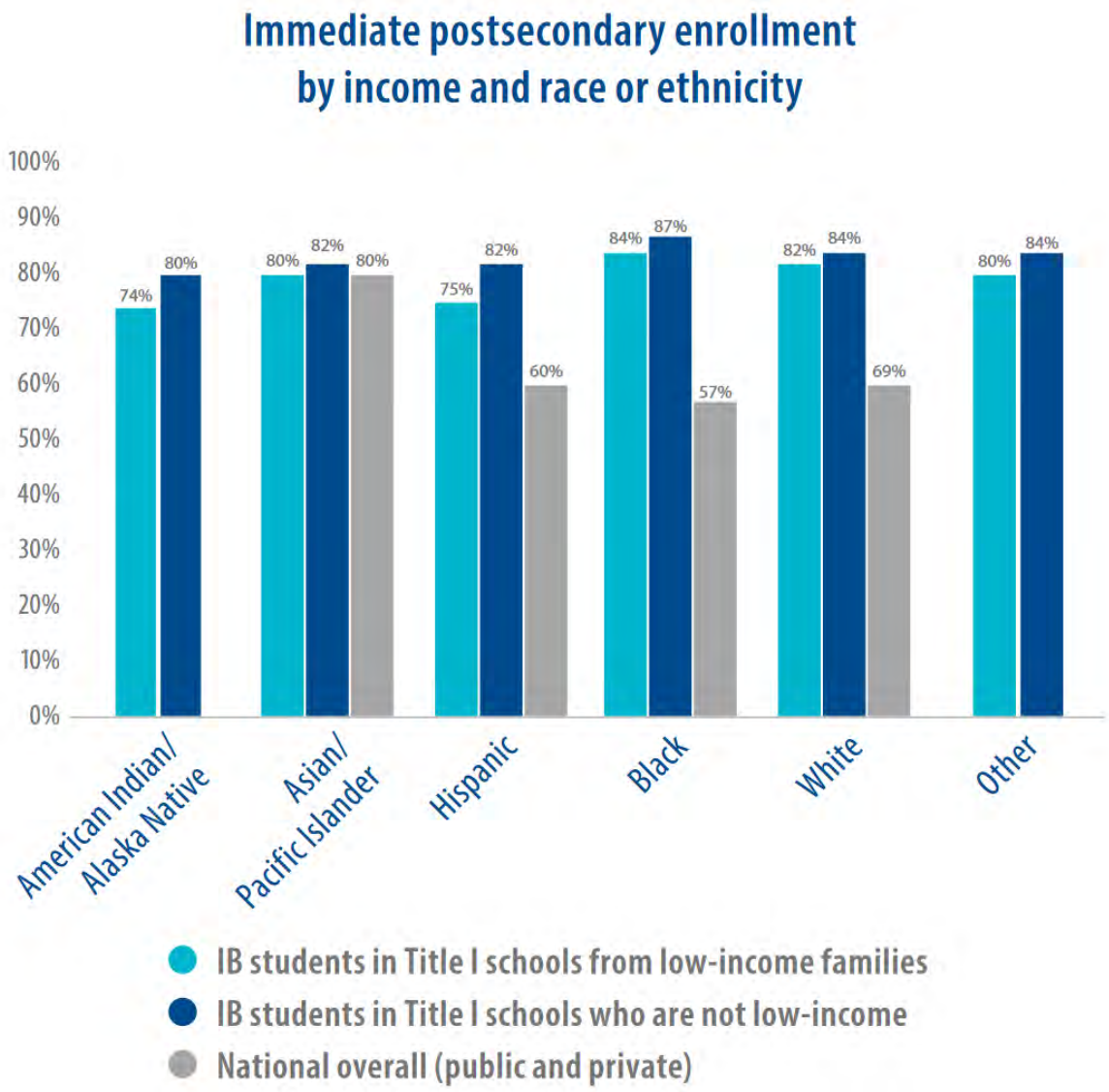
Experiences with Similar Projects: Promoting Academic Rigor & Postsecondary Credit In High-Need Schools

The IB works with schools, governments, and international organizations to develop challenging programs of international education and rigorous assessment. These programs aim to create lifelong learners who are inquirers, knowledgeable, thinkers, communicators, principled, open-minded, caring, risk-takers, balanced, and reflective. These dispositions are cultivated through the IB courses in both the CP and DP, which are rigorous two-year programs for students aged 16 to 19, offering a comprehensive and rigorous course of study designed to prepare students for success in postsecondary institutions and careers.

The IB supports high schools in major school districts across the country, including Atlanta, Boston, Chicago, Denver, Houston, Indianapolis, Los Angeles, Miami-Dade, Nashville, New York, Philadelphia, Seattle, and Washington, DC (among others). Research has demonstrated that IB students are more likely to enroll in more selective colleges and to have higher persistence rates than peers from similar backgrounds, including students from Title I schools. Of note, close to 90% of IB schools in the US, over 2,500 nationally offering more than 2,800 programmes, are public, and between 60% and 73% receive Title funds.

A study from the University of Chicago found that, when compared to a matched comparison group, students in the IB DP are 40% more likely to attend four-year colleges and 50% more likely to attend more selective colleges. In addition, these students are significantly more likely to persist in four-year colleges for two years. When in college, IB DP students report feeling prepared to succeed and indeed excel in their coursework, often stating explicitly that their experiences in the IB DP taught the specific skills and behaviors demanded of them in college.


Immediate postsecondary enrollment
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
82%
82%
79%
66%
46%
All DP students in public schools
All DP students in Title I schools
Low-income DP students in Title I schools
All US students (national cohort)
Low-income US students (national cohort)



Each year, over 5,000 universities in more than 100 countries/territories receive IB students' admission applications and transcripts. In most countries, the IB serves as a qualification for admission. In the US, IB credits are awarded at the discretion of the colleges and therefore occur after students have applied and been accepted to a college. Over 1,000 U.S. colleges have recognition policies for the Diploma and Career-related Programmes.

Anticipated Outcomes & Theory of Change

Describe the anticipated outcomes of the services offered. Describe how the services will impact student learning outcomes. Outline the theory of change relating to the program and how it is monitored to evaluate program implementation and impact.

IB outcomes research studies investigate the impact of IB programs on teachers, schools, and students. You can read all completed studies on all four programs on the IB website.

The following is an overview of how the IB structures its research to inform the educational field while providing evidence of the impact of IB programs or areas of programmatic improvement. All IB studies aim to improve education but are specific to the pedagogies found within the IB. By examining the qualities and characteristics of schools, students, and teachers, program impact research helps both the IB and external organizations better understand the value of an IB education.

What do the studies achieve?

Program impact research generally falls into one of three categories, which examine different aspects of an IB education. These examine questions such as:

Student, school, and systemic outcomes

- What is the academic experience and performance of IB students?
- How do the academic experience and achievement of IB students compare to their non-IB peers?
- Are IB students academically engaged and challenged?
- How well does an IB education prepare students for future success?
- To what extent do students exhibit characteristics described in the learner profile?
- To what extent do a school's philosophy, structures and systems enable students to develop into the learners described in the profile?

Program implementation

- What is the impact of the implementation of an IB program on schools, teachers, and students?
- How does the school change as a result of the implementation of an IB program?
- What are successful strategies and challenges in the implementation of IB programs?

Program standards and alignment

- How do IB standards compare with educational standards of various global, national, and state systems?
- How do IB standards compare with well-established, strong academic standards for what students should know and learn?

PYP outcomes

A mixed methods study examined the PYP's impact on school climate within public elementary schools in the United States. The study found numerous improvements to school climate that most participants attributed to the PYP. Participants at every school reported increased attention to student well-being and the whole child, as well as greater use of transdisciplinary instruction and teacher collaboration due to the PYP. Additionally, the quantitative data showed statistically significant improvements post-authorization on six school climate outcomes: perceived safety, caring relationships, fairness, parent involvement, bullying, and victimization.

A study was conducted across five countries (China, Kenya, Mexico, Russia, and the United Kingdom) to understand the impacts of the PYP Exhibition Project, a culminating project in which students investigate and present their learnings on a chosen topic. The study found overwhelming support from parents, students, and teachers for the exhibition as an activity, and a deep conviction that this was not only a good use of curriculum time, but also the pinnacle of PYP achievement. Study participants believed that the exhibition helped to develop students' critical thinking, international-mindedness, and learner profile attributes.

In terms of literacy and numeracy in the PYP, a study in Australia explored the impacts of PYP implementation as well as student outcomes on a national assessment for reading and numeracy. PYP students performed at higher levels in both reading and numeracy when compared to non-IB schools. Additionally, school staff believed the PYP contributed to student learning, academic achievement, development of learner profile attributes, and motivation.

MYP outcomes

In China, Hong Kong, India, Indonesia, and Japan, researchers compared the DP outcomes achieved by students who completed their middle years' studies in the MYP, a state or national curriculum, or another international program. Former MYP students performed significantly better than non-MYP students in the total DP points earned as well as in subject exams in language and literature, language acquisition, individuals and societies, and mathematics. MYP students also reported using higher-order thinking skills, such as critical thinking and analytical skills, more frequently than non-MYP students.

Researchers in Spain compared the Spanish curriculum, Educación Secundaria Obligatoria (ESO), and the MYP. The study indicated that introducing the MYP's concept-based learning approach, the learner profile, and a more comprehensive assessment system substantially enhanced the ESO. The study also explored the impact of the MYP in eight Spanish private schools. Overall, students, teachers, and administrators reported that the MYP supported a range of positive outcomes in their schools, including the development of student competencies such as research and critical thinking skills, and encouraging school-wide improvements to teaching and learning.

A study in a large school district in the United States investigated the impact of MYP participation on high school course enrollment and achievement. A statistical technique called propensity score matching was used to compare the high school outcomes of former MYP students with demographically similar non-MYP students. Former MYP students were 34% more likely than non-MYP students to take at least one advanced placement or Diploma Programme exam in high school. Additionally, MYP enrollment significantly increased the likelihood of earning at least one "college-ready" score on a college preparatory exam (by 39%).

DP outcomes

A series of studies have been conducted on the academic outcomes of DP students in the US. Most notably, one DP study draws on multiple datasets to examine the postsecondary outcomes of IB DP students (N = 37,348). Results show that 82% of US DP graduates enrolled in college immediately after graduating from high school, as compared to 66% of all US high school graduates. Of the DP graduates who enrolled in college immediately after high school, 88% returned to the same institution the following year, compared to 80% of all US students. Three years later, 62% of DP graduates earned a four-year college degree, as compared to 41% of all US students. For course students, the number of assessments and average assessment scores

were associated with greater postsecondary success. Similarly, DP candidates with strong IB performance had higher predicted odds for college enrollment, persistence, and graduation than their lower-performing peers.

A separate study examined the high school and post-secondary experiences of IB DP students in public schools serving students from predominantly low-income households. The findings from the study indicate that DP students experience more rigorous classes, are more motivated, and are more engaged than their non-IB peers. Data showed positive and significant effects of IB participation on college retention rates and five- and six-year graduation rates. Lastly, DP alumni reported that the DP helped prepare them for the challenge of college coursework, particularly in the areas of writing, critical thinking, study skills, and time management.

CP outcomes

Studies examining the effectiveness of career and technical education (CTE) in secondary school often reach inconclusive findings on the question of whether CTE promotes career-oriented skills without any detriment to students' academic achievement. Launched in 2012, the IB Career-related Programme (CP) has been uniquely designed to do just that: it combines the rigor of IB courses with the practical learning of CTE to promote both college and career readiness equally. One study examined the patterns of higher education enrollment, destinations, and persistence of all CP graduates from secondary schools in the US between 2013 and 2015. Immediate enrollment, persistence, and preference for four-year over two-year colleges were all higher for CP graduates than for all US graduates nationally. In addition, CP graduates attended selective higher education institutions. Of the CP graduates who chose four-year institutions, more than half (55%) enrolled at a university ranked by Barron's Selectivity Index as "very competitive" or better.

Theory of change

Through its centering on the mission statement and learner profile, the IB seeks to integrate inquiry-based teaching and learning (ITL) across all programs and subjects. A study concerning the IB's Theory of Change examined the meanings and practices of ITL in a sample of IB World Schools (IBWSs), describing the IB approach to, and implementation of, ITL. The study involved students, educators, and schools engaged in the PYP, MYP, and/or DP.

The researchers propose an organizational theory of change for how the IB supports IBWSs in implementing ITL. This theory of change articulates two organizational strategies: 1) provide resources to clarify and support key principles of the organization, and 2) build a mutually supportive ecosystem by engaging educators who enact and share practices of ITL. The two strategies are shown in parallel to each other, as they appear to be equally important and also mutually reinforce one another. In other words, the resources support the participants in the ecosystem, such as teachers and school leaders, and the actions of educators in the ecosystem produce new resources.

These two strategies lead to a series of interim outcomes.

- Providing resources enables the organization to articulate what is fixed and flexible, focus deliberately on what it stands for, help schools and educators to build upon their successes, and support schools and educators in addressing their contexts while engaging in continuous improvement processes.
- The mutually supportive ecosystem refers to educators and schools supporting one another to learn about a range of promising practices, create a collaborative culture

where schools learn from each other, support educators and schools in enacting principled adaptation of ITL within their contexts, create learning environments that align with research-based knowledge about how people learn and encourage teachers to pursue their inquiries to innovate and continuously improve.

The hypothesis is that if the organizational theory of change operates successfully, then teachers should be able to facilitate and students should be able to participate in well-designed inquiry-based instruction.

Instructional theory of change

Both teacher and student actions have an impact on creating a productive learning community. Relationships between teachers and students are important, and many of their respective actions have reciprocal relations. For example, teachers listen deeply to students' questions and curiosities and then pose questions, interact with students in ongoing dialogue, and provide feedback on possible directions for student inquiry. Importantly, teachers provide strategic support for students to develop understanding, learn to collaborate, and create products. Teachers can also help by fostering an open classroom environment and demonstrating care for students. In inquiry-based classrooms, students' questions and curiosities drive classroom activity and provide purpose for their work daily and across time. Teachers challenge students to learn to work independently, as well as collaboratively during their inquiries. Students collaborate on separate and shared inquiries through talk, interaction, and discussion, and spend time creating products or performances, sharing them with various audiences. Inquiry also allows students to take action to contribute meaningfully to their communities.

Further, along the way and/or afterward, students have opportunities to reflect, which drives both their learning and overall development. According to the proposed instructional theory of change, these actions and conditions enable students to participate in well-designed and well-facilitated disciplinary and transdisciplinary inquiry-based learning, resulting in several interim outcomes:

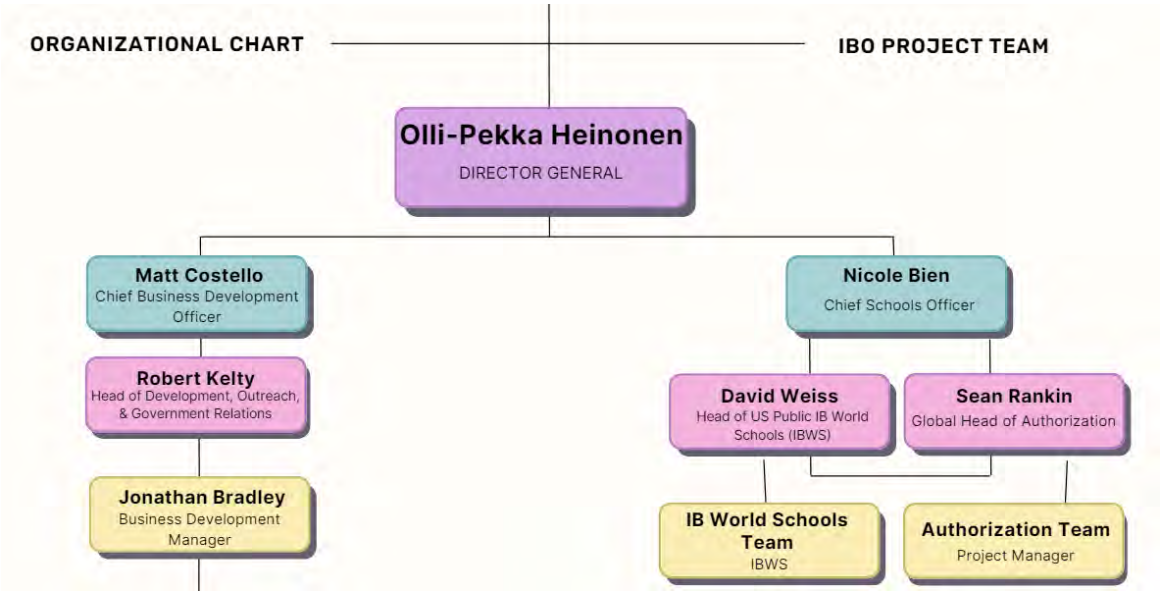
- Students are engaged and interested in their learning,
- students exercise agency through voice, choice, and ownership,
- students take risks and cope with uncertainty and frustration,
- students deeply learn concepts and practices across the disciplines, and
- students feel satisfaction about what they have learned and accomplished, and see it as meaningfully connected to their lives outside school, their community, and the world.



By pursuing their questions and curiosities, supported by their teachers and fellow students, students are engaged and interested in their day-to-day work. Students can exercise agency, rather than being passive recipients of transmitted knowledge—they have opportunities to exercise agency by expressing their voices, making meaningful choices, and owning their learning. These are also major motivational benefits, which encourage students to take risks, overcome uncertainties, frustrations, or obstacles they face along the way, and explore alternative approaches during their inquiries. Well-designed and well-facilitated inquiry classrooms enable students to deeply learn concepts and practices. The productive, action-oriented work they do in this environment can result in students feeling satisfaction about what they learn and accomplish because it is connected to their own lives, the lives of others in their communities, and the world outside school.

Organizational Chart

Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP.



Ollie-Pekka Heinonen - Director General

Matt Costello - Chief Business Development Officer, Business Development Office & Executive Team

Nicole Bien - Chief Schools Officer

Robert Kelty - Head of Development, Outreach, & Government Relations, IB North America, Ed.D.; Robert Kelty will support the County and school district alongside the Development Manager for interested schools to enter IB candidacy.

Jonathan Bradley - Business Development Manager, Tennessee, Supporting Schools Applying to the IB and entering into candidacy.

Sean Rankin - Global Head of Authorization

Authorization Team - Supporting Schools in Candidacy. Authorization staff alongside a consultant and District staff will support schools in moving from candidacy to authorization as an IB World Schools

David Weiss - Head of US Public IB World Schools (IBWS)

IBWS Team - Supporting Authorized IBWS. IBWS staff will support schools post-IBWS authorization with emerging questions and maintaining authorization.

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Relevant Team Members

Information about each person listed should include their a) title b) advanced education credentials c) relevant work experience in the areas addressed by this RFP, as applicable d) number of years with the organization, and e) description of the type of work the individual will perform.

DAVID WEISS

International Baccalaureate Organization

Bethesda, Maryland October 2017 to present.

Head of US Public Schools

- Supervise team of specialists providing program support for all International Baccalaureate public schools and 3000+ IB programs in the United States.
- Responsible for IB school program post-authorization services, including evaluation and support for continuous improvement and continuous improvement: leadership capacity development, evaluation design, IT systems development, public relations, contract negotiations and governmetnal relations.
- Liaise with global Teaching & Learning, Professional Development and Assessment Offices on program development and policy implementation as they impact US Public schools.

Long Beach Public Schools

Long Beach, New York. July 2011 to September 2017.

Superintendent of Schools

- Lead and manage Long Beach City Schools, a small city school district, located in Nassau County, comprised of six schools and an Adult Learning Center, serving a diverse population and enrollment of 3860 students from pre-Kindergarten through high school. Oversee all matters relating to curriculum, instruction, finance, technology, human resources, legal, transportation, facilities, public relations, and community outreach. Supervise 28 administrators, 350 teachers, and 650 other employees.
- Increased graduation rate to 99%, Regents Diploma graduation to 96%, improved economically disadvantaged graduation rate to 92%. Expanded International Baccalaureate Diploma Program to 129 IBD candidates and 313 students overall (55%). Facilitated authorization of Long Beach Middle School as an International Baccalaureate Middle Years School. Long Beach High School was named *National School of Opportunity* by National Education Policy Center and now is in the top 1% of United States High Schools on *Washington Post's* college-readiness *Challenge Index*.
- Managed completion of a $98 million capital improvement project, including upgrades to pre-Kindergarten, elementary and secondary classrooms, secondary science labs, library and technology upgrades, construction of state of the art video and sound studios, chorus room and music practice facilities, dance studio, and athletic facilities. Managed $45 million FEMA funded storm recovery and reconstruction following Hurricane Sandy. Implementing secondary 1-to-1 computing in a ubiquitous wireless environment.
- Negotiated and implemented Annual Professional Performance Review with a learner-centered instructional focus. Supervised shift to Common Core Standards through professional development and curriculum improvements. Successful recipient of NYSED Strengthening Teacher and Leadership Effectiveness Dissemination Grant and Learning Technology Replication Grant. Integrated Social & Emotional Learning Competencies into District Wellness Policy and established PreK-12 SEL Committee.
- Initiated comprehensive revision of K-5 Curriculum, establishing common units of study including Reading/Writing Workshop approach within a Balanced Literacy Framework. Implemented common benchmark assessment systems (BAS and NWEA), on-demand

writing benchmark assessments and a standards based report card. Organized teacher instructional day for common planning and embedded professional development. Redesigned library & computer instruction to provide technology based project based learning experiences in upper elementary grades. Succeeded in having all district schools achieve Annual Yearly Progress for first time in a decade.

- Developed fiscally responsible budget of over $135 million that maintained and improved academic programs while raising the tax levy only an average of 1.85% annually (under the allowable limit) at the same time incorporating the costs of the voter-adopted construction bond. Maintained Long Beach Class 1 tax rate as among the lowest in Nassau County.

Commack Public School District

Commack, New York. June 2001 to June 2011.

Assistant Superintendent for Secondary Education (June 2004 to June 2011)

- Supervised administrative and teaching staff in high performing, large suburban district with a budget of $164 million. Increased Regents Diploma graduation rate to 99%, Advanced Regents Diploma rate to 81% and Special Education Regents Diploma graduation rate to 90% through data-based decision making and improvement in learner-centered instruction.
- Served as District Chief Information Officer. Coordinated data systems and managed submission of all accountability data to NYS Data Warehouse. Chaired K-12 District Technology Committee, oversaw technology integration, including white-board initiative.
- Hired, supervised, and evaluated teaching staff. Participated in budget preparation, staffing, and public relations. Served as Superintendent's Hearing Officer. Chaired K-12 Human Development/SEDL Committee renewing district focus on Social and Emotional Learning. Won $1/2 million 5-year SAMSHA grant for community drug and alcohol coalition.
- Initiated School-Business Partnership. Established grades 8-to-9 Transition Team. Expanded International Baccalaureate Diploma Program to over 500 students through review of placement and instructional practices. Facilitated first successful International Baccalaureate Middle Years Program implementation on Long Island. Implemented universal acceleration in Regents Science in 8th grade with a 97% pass rate.
- Organized teacher and administrator professional development. Provided training, in assessment, data analysis, Socratic dialog, differentiated instruction, learner-centered approaches to science and math, essential questions, advanced organizers, *Breaking Ranks,* Internet literacy and cyber-safety.

Assistant Principal, Commack High School (June 2001 – 2004)

- Provided leadership to improve curriculum integration and alter assessment practices in shift to *All Regents* High School Model. Developed system to monitor student achievement and provide interventions to increase Regents Diploma rate from 80% to 92%.
- Oversaw curriulum areas, International Baccalauteate Program, Advanced Placement exams, Senior-At-Risk Program, Academic Mentoring Program, web-site, calendar and daily building operations. Implemented *World of Difference* and other peer-to-peer programs leading to selection as *Suffolk County Human Rights High School of the Year (2002).*

South Side High School, Rockville Centre Public School District

Rockville Centre, New York. September 1980 to June 2001.

Coordinator, International Baccalaureate Diploma Program

- Implemented the International Baccalaureate Diploma Program offering advanced coursework in all major academic disciplines.
- Dramatically increased participation rate from three students to over two hundred, creating one of the largest and most successful programs in North America leading to *Newsweek* ranking as one of the top 25 schools in the nation, selected as a case study in a doctoral dissertation on the implementation of the IB in North America, and as featured program for replication in NYSED's *Sharing Success* Program.

Chairperson, Social Studies, Project Associate in Humanities (7-12), & District Web Master

- Provided training in Instructional Skills Model, Cooperative Learning, Alternative Assessment, Research Skills, and *Writing to Think*.
- Utilized outcome based planning and data analysis on student performance to reassess acceleration and grouping practices to "level-up" instruction. Implemented team approach to ninth grade instruction.

Social Studies Teacher

- Developed and taught courses in World & American History for students participating in the International Baccalaureate Program. Wrote curriculum and taught high school students at a variety of academic levels.
- Member successful application team for South Side HS to become a *U.S. Department of Education Blue Ribbon School of Excellence.* Nominated by the District as *NewYork State Teacher of the Year* and *Disney Teacher of the Year.* Recipient of *Cablevision/Hofstra University Educator of the Month* Award.

Lynbrook Summer High School Program, Lynbrook Public School District

Lynbrook, New York. Summers, 1985 to 1995.

Social Studies Teacher

- Instructed academically at-risk students in summer remedial program. Utilized a variety of techniques to increase motivation and improve student self-confidence along with their skill development.

Bay Shore High School, Bay Shore Public School District

Bay Shore, New York February 1979 to June 1980.

Social Studies and Psychology Teacher

- Taught Global Studies, Psychology, Sociology, and Mathematics to a heterogeneous student population. Selected *Teacher of the Year* by students.

International Baccalaureate

Founder and President, Guild of IB Schools, Inc. (GIBS)

- Founded and managed regional association of IB schools for New York, New Jersey, Massachusetts, Connecticut, Rhode Island, New Hampshire, Maine and Vermont (1998 to 2010).

- Developed teacher training programs, ran meetings for prospective IB schools and college admissions officers, established web-site , and successfully lobbied departments of education for funding and recognition Provided consultation to IB Diploma and Middle Years schools authorized since the founding of GIBS in 1998.

Awards

- Child Advocate of the Year, Project Excellence (Long Beach, NY), 2014.
- Western Suffolk BOCES *Technology Administrator of the Year* Award, 2007-08
- Hofstra University/Cablevision News 12 *Educator of the Month*, July 2000.
- 1998 Person of the Year, *Rockville Centre Herald* (January 1999).

Presentations

- Panelist, "The Center for Childrens Initiatives/Campaign for Educational Equity Forum on Pre-Kindergarten as a Right," Teacher's College-Columbia University, May 2017.
- Presenter, "Arts Pathways to Graduation," New York Board of Regents Meeting, December 2015.
- Presenter, "State Mandates in the Tax Cap Era," Nassau County Council of School Superintendents Financial Forum, February 2015.
- Panelist, "Connecting the International Baccalaureate to the Common Core," International Baccalaureate Conference, Bethesda, MD, 2014.
- Presenter, SCOPE Conference,. "SEDL for Administrators," Molloy College, December 2009.
- Panelist, "The Role of the Chief Information Officer," *DATAG Winter Conference*, Guilderland, NY, 2006.
- Conference Organizer and Key Note Speaker, GIBS IB Orientation Program, "The IB Learner Profile in a Flat World," Commack Middle School, October 2005.
- Conference Organizer , *Guild of IB Schools Annual Conference for Administrators and Coordinators*, Times Square Doubletree, January 2004 through 2010.
- Key Note Speaker, New England Association for College Admission Counselor Association Meeting, Babson College, May 2004.
- Presenter, International Baccalaureate Regional Heads Meeting,. "Demystifying IB Assessment," La Jolle California, December 2003.
- Presenter, New York State Education Commissioner's Panel on Alternatives to the Regents Exams, Albany, November 2003. (History and Biology)
- Conference Organizer and Key Note Speaker, "The International Baccalaureate: A One-Day Conference for Colleges and Universities," University of Rochester, June 2003.
- Guest Lecturer, C.W. Post/L.I.U. Summer Educational Leadership Program, 2002 & 2003.
- Key Note Speaker and Trainer, Staff Development Day, Somerset Hills Public Schools (NJ). "Utilizing the International Baccalaureate Diploma Program to Create Excellence and Equity in a Public High School," October 2002.
- Presenter, New York State Education Commissioner's Panel on Alternatives to the Regents Exams, Albany, April 2002. (Social Studies)
- Conference Organizer and Presenter, "The International Baccalaureate: A One-Day Conference for Colleges and Universities," Amherst College, June 2002.

- Workshop Organizer, "Guild of IB Schools Workshop for New International Baccalaureate Coordinators and Administrators," Commack High School, January 2002.
- Workshop Organizer, "Guild of IB Schools Workshop for Guidance Counselors," Commack High School, January 2002.
- Key Note Speaker, Staff Development Day, Blindbrook-Rye Public Schools. "International Baccalaureate Primary Years, Middle Years and Diploma Programs as Models to Create Excellence and Equity in a Public School System.," November 2001.
- Workshop Organizer, "Guild of IB Schools Workshop for New International Baccalaureate Coordinators," South Side High School, January 23, 2001.
- Key Note Speaker, Staff Development Day, Locust Valley Public Schools. International Baccalaureate Program Implementation. November 2000.
- Presenter, New York College Admissions Counselors Conference, Hofstra Univeristy, "The International Baccalaureate," June 2000.
- Presenter, IBNA Regional Conferece in Quebec City. "The Status of Research Studies About the International Baccalaureate in North America," July 1999. Cited in National Research Council's Study, *Learning and Understanding: Improving Advanced Study of Mathematics and Science in U.S. High Schools (2002).*
- Presenter, New York State Education Commissioner's Panel on Alternatives to the Regents Exams, Albany, November 1999. (Mathematics and English)
- Presenter, Long Island Council on the Social Studies. "Innovative Assessment Techniques", 1990.Presenter, Hofstra University Principal's Center: "Integrated Curriculum as a Model for Change," 1989.

Professional Affiliations and Achievements

- Executive Committee, *New York State Board of Regents Blue Ribbon Commission on the Arts*, 2015-present.
- Executive Board, *New York State Small City Schools Association*, 2013-present.
- Long Island Regional Advisory Council on Higher Education. University Presidents-Superintendents Partnership Committee, 2014-present.
- Long Island Pre-K Initiative Advisory Committee, 2015-present.
- Nassau County Council of School Superintendents Curriculum Committee, 2011-present.
- Nassau County Council of School Superintendents Legislative Committee, 2014-present
- Nassau County Council of School Superintendents Special Education Committee, 2015-present.
- *State University of New York at Stony Brook.* Executive Seminar in School Business Affairs, 2009.
- Founding Steering Committee Member, *SELF: Long Island Social & Emotional Literacy Forum.* August 2004-11.
- Member, International Baccalaureate North America, *District Task Force*, 2004 to 2006.
- Consultant, Pine Bush Public Schools and Palmyra-Macedon Public Schools. International Baccalaureate Program Implementation, Summer 2001.
- Authorized as a Developer Demonstrator (D/D) for replication of the International Baccalaureate in New York State by the NYSED, July 2000. <http://www.sharingsuccess.org/code/eptw/profiles/83.html>
- Consultant, Northport Public Schools. International Baccalaureate Program Implementation, Summer 2000.
- Appeared on *Evening News With Bryan Williams,* MSNBC, on Anniversary of Watergate, June 1997.

- Member, IBNA Site-Visit Authorization Team (Hoboken HS, Binghamton HS) and Middle States Visitation Team, St. Mary's High School (College Point, Queens).
- Adjunct Psychology Instructor, *Plaza Business College*, Jackson Heights, NY. Fall and Spring Semester, 1994.
- Consultant, CHOICES Curriculum Project, Brown University Center for Foreign Policy Development, 1992-94.
- National Endowment for the Humanities: National Humanities Faculty Summer Institute Grant Recipient, 1984-86.
- Member of *Association of Supervision & Curriculum Development* (ASCD); *National Association of Secondary School Principals* (NASSP), *International Society for Technology in Education* (ISTE), *National Staff Development Council* (NSDC), & *National Middle Schools Association* (NMSA).

Education

Long Island University/C.W. Post. Doctorate in Interdisciplinary Educational Studies, 2020.

Long Island University/C.W. Post. School District Administrator Program. New York State SDA, May 2004.

Hofstra University. Master of Arts (with Distinction) in Education, 1985.

University of Rochester. Bachelor of Arts in Sociology, 1978.

References Available on Request



Robert Kelty

Education Leader / Government Relations

CONTACT

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robertpkelty@gmail.com

LinkedIn: www.linkedin.com/in/robert-kelty-ed-d-35286963/

Washington, D.C.

EDUCATION

- **Superintendent/Education Leadership Certificate, Northern Arizona University,** 2017
- **Education Doctorate (Ed.D),** Curriculum & Instruction, **Northern Arizona University** 2014
- **Masters of Arts,** Education, **University of New Mexico,** 2005
- **Bachelor of Arts,** Philosophy, Minor Zoology, **Louisiana State University**, 2001

SKILLS

- Legislative Analysis
- Future-Focused Education Understanding
- Grassroots Organization
- Fiscal Note & Salesforce
- Public Speaking

QUALIFICATIONS SUMMARY

Accomplished education and government relations professional with a proven track record in strategic leadership, impact, and advocacy. Seeking a position to leverage my expertise in government relations, education policy, and organizational development to address systemic education reform for the United States and at scale. Former Arizona Teacher of the Year, Head of School, District Superintendent, County Superintendent of Schools, Elected Official, Senior Manager for Teach For America, and currently the Head of Development, Outreach, and Government Relations for the International Baccalaureate (IB), North America.

RELEVENT WORK EXPERIENCE

Government Relations 2020 - Current

International Baccalaureate, United States and Canada

Created the first government relations strategy for the IB North America, with a focus on advancing the IB's footprint in priority and developing markets in the U.S. and Canada. Legislative priorities included the promotion of advanced programs, dual enrollment, conceptual mathematics, early childhood education, graduation equivalency, university recognition, college readiness, and others. In the strategy's first year, we were successful in OH, UT, VA, NM, OR, MS, and FL while defeating legislation in TX. Federal strategy slated for FY2024. Fluent in Fiscal Note/legislative analysis software and how to leverage grassroots networks for state issues and legislative priorities.

Government Relations 2010 - 2020

Coconino County & City of Flagstaff, Arizona

As an elected official in the position of the Coconino County Superintendent of Schools, I created a legislative branch in the Coconino County Superintendent of Schools Office to promote legislative priorities in the Arizona legislature, led federal lobbying for key legislative priorities such as the Secure Rural Schools Act, and worked with 6 American Indian tribal nations on various education equity initiatives. After leaving the County and going to Teach For America, I led a successful city-wide effort at universal preschool for children in the City of Flagstaff as Chair of LAUNCH Flagstaff, a cooperative of elected officials, business leaders, and non-profits focused on education improvement. All of the above was informed by my dissertation studies, which focused on the machinations of state policy clearinghouses and how to move public opinion on key legislative issues.



Robert Kelty

Educational Leader / Government Relations

Professional Summary

International Baccalaureate

- 2023, Head of Development, Outreach, & Government Relations
- 2022, Interim Head of Development & Outreach
- 2020, Senior Manager, Development & Outreach

Flagstaff Unified School District

- 2016, Head of School, Puente de Hozho Elementary School

Teach For America

- 2014, Senior Manager, Alumni Engagement and Affairs

Coconino County

- 2010, Coconino County Superintendent of Schools
- 2010, Superintendent, Coconino County Accommodation School District

Educator

- 2009, Northern Arizona University
- 2008, Arizona Teacher of the Year
- 2005, Puente de Hozho Elementary School, Flagstaff, Arizona
- 2001, Crownpoint Elementary School, Navajo Nation

Teach For America

- 2001, Corp Member, NM Charter Corp

Hobbies

- Avid Rock Climber
- DC Trail Runner
- Excellent Vegetarian Recipe Follower (Although I Eat Birds & Fish)
- Super Proud Father

Relevant Publications

2022 *A Missing Piece for Education in the United States: Moving from an Industrial to an Inquiry-Based Paradigm*, Fordham Institute, Wonk-a-Thon.

2021 *Puente de Hózhó: An Evolving Story of Revitalization, Schooling, and Globalization in the Southwest.* On Indian Ground: The Southwest, Chapter 6.

2021 Signatory, Amicus Brief to the 9th Circuit Court of Appeals concerning the Federal Promise of Education to Indian Children

2021 *A Spirit of Hope and Action in MYP Projects*, International Baccalaureate Global Blog

2020 *Thinking about Day One: A Trauma-Informed Reopening of Schools*: International Baccalaureate Global Blog & Podcast Series

2008 *Perspectives on Change: A Continued Struggle for Academic Success and Cultural Relevancy at an American Indian School in the Midst of No Child Left Behind*, Journal of American Indian Education, 47 (1), 65-81.

Recognitions & Awards

2020 Board Member, Barbara Henry Courage in Teaching Aware
2014 United Way of Northern Arizona's Community Building Award
2012 Elected, Coconino County Superintendent of Schools
2010 Appointed, Coconino County Superintendent of Schools
2009 "Most Influential Faculty Member," Northern Arizona University
2009 Fellow, Arizona Education Policy Fellowship Program, Lincoln Center for Applied Ethics & the Mary Lou Fulton College of Education, Arizona State University
2009 Honorary Doctorate of Humane Letters, Northern Arizona University
2008 Arizona Teacher of the Year
2004 Recipient, Ceremonial Blanket, Community of Crownpoint, Navajo Nation
2001 Teach For America, New Mexico Charter Corp
2001 Medal for Highest Academic Achievement, Louisiana State University

References

Available Upon Request

Curriculum Vitae Attached

SEAN TERRY ELLIS RANKIN

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SUMMARY

Trusted business leader with over 19 years' experience developing and implementing best-in-class solutions to education and business needs. Embrace and champion new challenges through driving strategic planning and implementation grounded in resource optimization and operational efficiencies.

EDUCATION

PENNSYLVANIA STATE UNIVERSITY
M.Ed.: Lifelong Learning and Adult Education: Global Online and Distance Education specialization (2018-Pending)
Currently completing dissertation

27/30 Credits completed with 4.0 GPA

FLINDERS UNIVERSITY
B.Ed. 2002-2005

CONTINUING PROFESSIONAL STUDIES
Harvard University Graduate School of Education: Future of Learning, 2012 and 2015

BOARD MEMBERSHIP

Kent State University, Gerald H. Read Center for International and Intercultural Education

EXPERTISE

- Strategic Planning
- Operations
- International Education
- Team Building
- Staff Development
- Presenting/Public Speaking

PROFESSIONAL EXPERIENCE

INTERNATIONAL BACCALAUREATE Washington, DC

Head of Authorization and Head of School Delivery *August 2022 – present*
Head of Authorization *October 2016 – August 2022*

Lead two core global business functions at an international education organization present in over 150 countries, serving as the global expert on customer onboarding, product implementation, customer sustainability and retention, and the development of and operationalization of policies, processes, and services. Advise and partner with the organization's executive leadership team members and other business leaders to drive internal strategy and optimize internal business functions, including finance, business development (sales), marketing and communications, strategy and transformation, business intelligence, project management, IT, and product development, to achieve and exceed organizational goals.

- Generated a 12% increase in product volume through customer sustainability and retention strategies, and reduced product implementation time by between 5-10% (dependent on the product) through targeted support strategies and increasing clarity of customer communication.
- Implemented customer-centric onboarding strategies that opened up customer markets and allowed for an increased year-long sales funnel.
- Optimized internal resources (human and technological), polices, and processes to create agile teams and working environments that allowed support for a higher customer volume without increased headcount.
- Restructured regional function teams into global service-based teams that leveraged and developed employee skillsets, increasing internal service effectiveness and internal service efficiencies.
- Acted as business lead on large multi-million dollar IT system projects, partnering with project teams using both agile and waterfall methodologies, to implement new and improved internal and external facing platforms and applications that enhance user experience.
- Introduced standard operating processes across the businesses utilizing the 90/10 rule that streamlined operational efficiencies and transformed ways of working.
- Managed multi-million dollar income and expenditure budgets and successfully maintained profit margins critical to the organization's revenue assumptions.
- Both business areas consistently reflected high employee engagement scores, with direct and indirect employees highlighting team management and leadership as a core engagement factor.

INTERNATIONAL BACCALAUREATE Washington, DC
Head of School Enhancement Services *October 2015 – September 2017*

Led this core global business function at an international education organization present in over 150 countries, serving as the global expert on service market expansion. Advised and partnered with the organization's executive leadership team members and other business leaders on the design, development, trialing, testing, and implementation of new services proactively reflective of market trends and projected demands.

- Analyzed current and emerging market trends and developed multi-year service expansion roadmaps based on projected market demands and customer needs.
- Acted as business lead on large multi-million dollar service to market projects, partnering with project teams using both agile and waterfall methodologies, to bring new services to market and develop the required IT infrastructure.
- Developed and managed multi-million dollar income and expenditure budgets and successfully maintained profit margins critical to the organization's return on investment and revenue assumptions.
- Optimized internal resources (human and technological), polices, and processes to create agile teams and working environments that allowed scalable service implementation without increased headcount.
- Differentiated service to market approaches based on customer context and market segmentation, creating customized service approaches within an overarching operationally efficient process.

INTERNATIONAL BACCALAUREATE Washington, DC
Global Manager, Pre-Authorization Services *September 2014 – February 2016*

INTERNATIONAL BACCALAUREATE Remote (Based in Australia)
Global contractor for the following roles:
Global Manager, Pre-Authorization Services *May 2014 – September 2014*
Global Lead, Workshop Development *August 2012 – September 2014*
Global Manager, Curriculum and Assessment *August 2012 – April 2013*

INTERNATIONAL BACCALAUREATE The Hague, Netherlands
Global Manager, Curriculum and Assessment *September 2010 – August 2012*

References available upon request.

Further professional experience available on request.

Jonathan D. Bradley
jonathan.bradley@ibo.org
301-202-3077 (o)
301-768-3025 (m)

Education

Master of Arts in Teaching, Social Studies December 1999, University of South Carolina – Columbia, SC, USA; B.A. in Anthropology May 1996, B.A. in Latin-American Studies (double major), University of South Carolina - Columbia, SC, USA

Qualifications

Development Manager, *International Baccalaureate*, September 2016-Present

- Plays a key role in the IB mission, working with schools, districts, governments, and organizations to develop challenging programmes of international education.

IB Coordinator and Magnet Director, 2013-2016
Richland Northeast High School (029012)

Westlake High School Math/Science Magnet and Advanced Placement Coordinator 7/2012-present
Magnet program: 1726
AP exams 2012: 450, 2013: 744 registered

- Responsible for admistering AP Exams, growing equity and access to AP, increasing AP subject offerings in consultation with instructional chairs and administration, processing and recommending AP teacher professional development, explaining the benfits of AP participation through multiple platforms.
- Analyzing PSAT/NMSQT ® results and using AP Potential ® and sharing these results through transparent means.
- Developing post-secondary partnerships that align to the magnet program
- Increasing experiential learning in the magnet program though curricular enhancements, varied field experiences, and guest-speaker series
- Communicating magnet program requirements and goals to feeder middle schools and all potential draws from the district to attend.
- Long range planning and feasability in preparation for candidacy application to the IB

IB Coordinator 2004-2012
Riverwood International Charter School (001144)
Fulton County Schools only authorized IB World School, Diploma Programme
2012 enrollment: 1640 May 2012, Total candidate registrations: 182, highest in 2011: 241
2002-2012, over 311 Diplomas awarded, 80% pass-rate

- Responsible for all activities related to the Diploma Programme
- Consistently increased access to the D.P. and increased overall pass-rate
- Responsible for all activities related in the implementation and initial application of a 6-10, Middle Years Programme
- CAS coordination, Extended Essay supervision, Personal Project mentorship

Georgia Educator Certificate, T-5, Gifted In-fields: Behavioral Science, Economics, Geography, History, Political Science, Valid through 6/2016

Social Studies Teacher 2001-2012
Riverwood International Charter School, Sandy Springs, GA
IB Subjects taught: Economics SL, Theory of Knowledge
Other subjects taught: Economics, International Affairs, World History, Political Science, World Geography, World Area Studies
International Studies Magnet Internship Coordinator
Talented and Gifted Teacher: Gifted Directed Studies, Gifted Career Internship Coordinator, Gifted Directed Research

Columbia High School 2000-2001
Richland District One, Columbia, SC
Subjects taught: World History, American Government

Committee memberships and other roles: Academic Integrity, Charter Steering , SACS review,School Leadership Team, Scheduling Committee, Academic Council, Magnet Probation, Technology, Professional Learning, BlackBoard Collaborate trained, Pamoja-knowledgeable, Turnitin.com and ManageBac school account administrator,

IB educator network - DP Academy, October 2011: DP coordination, CAS, Economics, TOK, site visitor/workshop leader; Executive committee member, *the IB Schools of Georgia* 2008-present
Planned and initiated annual roundtable meetings, created a website and manage contact database for the regional association: http://ibgeorgia.org ,represented the regional association at the regional heads leadership meetings, particpant in Triple A Workshop for Economics (C1)

Extra-curriculars and club sponsorship experience:
Boys Soccer Coach 2006-2012, Riverwood International Charter School, Region 3A
· Placed second in our region, 2009, 2010; Advanced to round of 16 at the State Playoffs - 2009, round of 32 - 2010
Academic Bowl Sponsor, National Honor Society Faculty Sponsor, Science Fair coordinator

ATTACHMENT B

KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSALS NUMBER 3688

Vendor: INTERNATIONAL BACCALAUREATE

Proposers shall submit a list of three (3) references for projects of similar size/nature that have been in service during the last five (5) years. Each vendor is responsible for obtaining approval to submit and confirming the contact information provided for each reference. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. Reference checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not use Knox County Government or Knox County Schools as a reference.

Name of Firm: Metropolitan Nashville Public Schools (TN)
Contact Person: Matthew Nelson **Phone**: 615-800-3696
Email Address: matthew.nelson@mnps.org
Nature of contract: Services agreement
Services provided: International Baccalaureate Annual fees (participation), Application & Candidate Fees, Consultant Fees, Professional Development, Evaluation, Student Exam & Assessment
Dollar amount: $2,500,000 (over life of contract and extensions)
Contract start: January 2019 **Contract end date:** January 2024; Renewal Occurring

Name of Firm: Fairfax County Public Schools (VA)
Contact Person: Daina Lieberman **Phone:** 571-423-4744
Email Address: dslieberman@fcps.edu
Nature of contract: Services agreement
Services provided: International Baccalaureate Annual fees (participation), Application & Candidate Fees, Consultant Fees, Professional Development, Evaluation, Student Exam & Assessment
Dollar amount: $7,000,000 (over life of contract and extensions)
Contract start: January 1, 2018 **Contract end date:** December 31, 2024

Name of Firm: Houston Independent School District (TX)
Contact Person: Sevasti Meloni **Phone:** 713-556-6619
Email Address: smeloni@houstonisd.org
Nature of contract: Services agreement
Services provided: International Baccalaureate Annual fees (participation), Application & Candidate Fees, Consultant Fees, Professional Development, Evaluation, Student Exam & Assessment
Dollar amount: $4,500,000 (over life of contract and extensions)
Contract start: April 30, 2018 **Contract end date:** May 31, 2021 (extended thru present day)

PROPOSED COSTS

Cost Sheet, Attachment A, includes all direct and indirect costs associated with the performance of the service. Proposed costs are inclusive of all expenses. Pricing includes all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. The IB understands there will be no reimbursement for any such charges.

Per the Cost Sheet (Attachment A), please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- *Annual Candidacy/Membership Fees*
- *School Application Fees*
- *Student Registration Fees*
- *Annual Program or Curriculum Fees*
- *Curricular Materials*
- *Exam Fees*
- *Professional Development (inclusive of materials and travel expenses, as applicable)*
    - *On-Site Format*
    - *Webinar/Virtual Format*
    - *Conference/Workshop Registration Fees*
- *Other Expenses*
- *Optional Features/Add On*

OTHER INFORMATION

Proposers may include any other information deemed pertinent to this solicitation, such as optional services to support district development. Information/pricing regarding supplementary materials/resources may be included in this section.

EXCEPTIONS

Please note all exceptions taken to any part of this Request for Proposals. If none are taken, please clearly state so. Do not mark through or otherwise alter the language of this RFP in your response.

The IB needs no exceptions to any part of this Request for Proposal.

ATTACHMENTS

ATTACHMENT A

KNOX COUNTY PROCUREMENT DIVISION COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$9,500 per school	Notes: Candidacy Fee, All Programmes
	PYP: $9,350	Notes: Annual Fee, PYP
	MYP: $11,030	Notes: Annual Fee, MYP
	DP: $12,790	Notes: Annual Fee, DP
	CP: $9,330	Notes: Annual Fee, CP
	DP/CP: $12,790 + $1,630	Notes: Annual Fee for a High School with Both CP/DP
	MYP/DP In Partnership: Varies on times of application	Notes: No AfC fee for middle school if applying with HS at same time and only pays $1,103 for candidacy and authorization fees; if applying at separate times, middle schools will pay $1,103 for the Annual Fee after authorization.
Application Fees	$4,000 per school	Notes: Discounts will be applied if districts apply for 5 or more programmes in the same fiscal year and with prior notification to the IB.
Annual Registration Fees	$ Varies based on district & states funding per student/candidate	
Annual Program Fees & Curriculum Fees (per course/subject)	Course: Extended Essay Core Fees: $ 95 Course: Theory of Knowledge Core Fees: $ 49 Course: Creativity, Activity, & Service Core Fees: $ 10 Notes:	
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students: Varies based on school and choice of curricular supports. The IB does not mandate a curriculum for any of its programmes.	
Exam Fees	$ $124 per exam	Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): IB refers to on-site workshops as Requested workshops. These workshops can be delivered across the following modes of delivery: face-to-face (two and a half days on-site, except for introductory workshops which are one day), blended (two days on-site + a 3-hour remote learning component), and virtual (two days of both synchronous/Zoom and asynchronous delivery). • 1-Day On-Site for 30 participants (includes travel) - Introductory workshops only: “Developing the CP” cost per participant USD $110.00. Total for 30 participants: (110*30) = USD $3,300.00 • 2-Day On-Site for 30 participants, blended model only which includes a 3-hour remote learning component (Includes travel) - All standard workshops: Cost per participant USD $350.00. Total for 30 participants (350*30) = USD $10,500.00 • 2 and a half days On-Site, face-to-face (includes travel) - All standard workshops: Cost per participant USD $350.00. Total for 30 participants (350*30) = USD $10,500.00 • 1-Day Webinar/Virtual for 30 participants - Introductory workshops only: “Developing the CP”	

	cost per participant USD $75.00. Total for 30 participants: (75*30) = USD $2,250.00
	• 2-Day Webinar/Virtual for 30 participants - All standard workshops: Cost per participant USD $290.00. Total for 30 participants (290*30) = USD $8,700.00
	• Required materials: (For all workshops: face-to-face and blended only)
	  • A flipchart pad/easel/ (11) markers
	  • 6 packs of post-it notes
	  • 1/2 letter paper ream
	  • 2 rolls of painter's tape
	  • 2 pairs of scissors
	  • 2 boxes of Crayola markers
	  • Pads/pens
	• Other expenses (apart from registration fee):
	  • Transportation costs for Workshop Leaders and Field Representatives between the host school and hotel
	  • Catering costs for participants, workshop leaders, and Field Representative
	  • Stationery and other necessary workshop materials (see required list of materials listed above)
	  • Limited on-site printing/copying for Workshop Leaders and Field Representatives

Registration Fees (Conference/Workshop)	Pricing for IB regional/scheduled workshops falls within the range listed below. Please note that these fees are subject to change over the next 36 months. IB Regional/Scheduled workshops are delivered by the IB and our official IB workshop providers. Starting at $900 per participant (not including travel and accommodation)
Other Expenses:	
Optional Features/Add-ons:	

DELIVERY: All shipments that are to be delivered must be Free on Board Destination to the department ordering the items. All shipping charges are to be included in the unit price of each item. All deliveries must be unloaded and delivered inside to the department location that is ordering the items.

ATTACHMENT C

KNOX COUNTY PROCUREMENT DIVISION INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS	
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE	
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT	
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident)	$1,000,000
			BODY INJURY (Per–Person)	
			BODY INJURY (Per-Accident)	
			PROPERTY DAMAGE (Per-Accident	
YES	4.	COMMERCIAL GENERAL LIABILITY		LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE	$ 1,000,000
			FIRE LEGAL LIABILITY	$ 100,000
			MED EXP (Per person)	$ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY	$ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE	$ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE	$ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2,000,000 ANNUAL AGGREGATE	
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE	
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE	
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED	
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000	
NO		PROFESSIONAL LIABILITY		
NO	10.	ARCHITECTS &ENGINEERS	$1,000,000 PER OCCURRENCE/CLAIM	
NO		ASBESTOS & REMOVAL LIABILITY	$2,000,000 PER OCCURRENCE/CLAIM	
NO		MEDICAL MALPRACTICE	$1,000,000 PER OCCURRENCE/CLAIM	
NO		MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM	
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM	
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)	
NO	13.	MOTOR CARGO INSURANCE		
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE	
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION	
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$	
NO	17.	DISHONESTY BOND	$	
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.	
NO	19.	USL&H	FEDERAL STATUTORY LIMITS	

20. **Carrier rating shall be Best's Rating of A-VII or better or its equivalent.**

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. **The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.**

23. **Certificate of Insurance shall show the RFP number and title.**

Insurance Agent's Statement and certification: I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.

Agency Name: _____ **Authorizing Signature:** _____

Proposer's Statement and Certification: If awarded the Contract, I will comply with the Contract insurance requirements.

Proposer's Name: Robert Kelly **Authorizing Signature:** _____

Client#: 1961181 INTERBAC1

ACORD™ CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 10/9/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
USI Insurance Services LLC-CL
4840 Cox Road, Suite 150
Glen Allen, VA 23060
804 200-5200

CONTACT NAME: Amanda Ballou
PHONE (A/C, No, Ext): 804 200-5200 **FAX (A/C, No):** 804 200-5185
E-MAIL ADDRESS: amanda.ballou@usi.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Hartford Fire Insurance Company	19682
INSURER B : Hartford Casualty Insurance Company	29424
INSURER C : Hartford - WC Multiple Issuing Cos	00914
INSURER D : Twin City Fire Insurance Company	29459
INSURER E : Trumbull Insurance Company	27120
INSURER F :	

INSURED
International Baccalaureate Organization
3950 Wisconsin Ave NW
Washington, DC 20016

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY			14UUNAY6VZU	01/01/2025	01/01/2026	EACH OCCURRENCE	$1,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$1,000,000
							MED EXP (Any one person)	$10,000
							PERSONAL & ADV INJURY	$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$2,000,000
	POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$2,000,000
	OTHER:							$
E	AUTOMOBILE LIABILITY			14UENBH4SVW	01/01/2025	01/01/2026	COMBINED SINGLE LIMIT (Ea accident)	$1,000,000
	ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	X HIRED AUTOS ONLY / X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
B	X UMBRELLA LIAB X OCCUR			14RHUBA0PC8	01/01/2025	01/01/2026	EACH OCCURRENCE	$5,000,000
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$5,000,000
	DED X RETENTION $10000							$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			14WBCAS2ELK	01/01/2025	01/01/2026	X PER STATUTE / OTH-ER	
D	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y/N: N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		14WECBM0USS-CO ONLY	01/01/2025	01/01/2026	E.L. EACH ACCIDENT	$1,000,000
							E.L. DISEASE - EA EMPLOYEE	$1,000,000
							E.L. DISEASE - POLICY LIMIT	$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

The General Liability and Umbrella Liability policies include an automatic Additional Insured endorsement that provides Additional Insured status to the Knox County Government, only when there is a
(See Attached Descriptions)

CERTIFICATE HOLDER

Knox County Government
100 N. Central St. Suite, 100
Knoxville, TN 37917

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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DESCRIPTIONS (Continued from Page 1)

written contract that requires such status, and only with regard to work performed by or on behalf of the named insured.

ATTACHMENT D

AFFIDAVIT OF COMPLIANCE WITH TENNESSEE CRIMINAL HISTORY RECORDS CHECK TENNESSEE CODE ANNOTATED, SECTION 49-5-413

(To be submitted with bid by contractor)

I, Robert Kelty, Head of Development, Outreach, and Government Relations swear or affirm that the International Baccalaureate Organization is in compliance with Public Chapter 587 of 2007, codified a Tennessee Code Annotated 49-5-413, in effect at the time of this proposal submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

Robert Patrick Kelty

Head of Development, Outreach, and Government Relations

For: International Baccalaureate Organization

STATE OF ~~TENNESSEE~~ Virginia } ECM
COUNTY OF Frederick }

Subscribed and sworn before me by
Robert Patrick Kelty,

Head of Development, Outreach, and Government Relations

International Baccalaureate Organization,

On this 9th day of October 2025.

Notary Public

My Commission expires: 09/30/2026

COMMONWEALTH OF VIRGINIA · ELECTRONIC NOTARY PUBLIC ·

Emon Christian Moore

REGISTRATION NUMBER
8033469
COMMISSION EXPIRES
September 30, 2026

Notarized remotely online using communication technology via Proof.

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature: _____

(sign in blue ink)

Title: Head of Development, Outreach, & Government Relations Date: 10/09/2025

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature: _____

(sign in blue ink)

Title: Head of Development, Outreach, & Government Relations Date: 10/09/2025

General Federal Funding Requirements (Exhibit A)

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying,'' in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

Knox County Government

and

Savvas Learning Company LLC

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and Savvas Learning Company LLC, hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this Contract.** This Contract commences on the 1st day of April 2026 and ends the 30th day of September 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. Upon the mutual agreement of the vendor and the County, the award may be extended for five (5) additional one-year periods. This may result in a total of five (5) years five (5) months and four (4) weeks. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. **Subcontracting/partnerships:** Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. **Payment.** Contractor warrants that the pricing shall remain firm for the initial period. At the end of the first period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. Right to inspect. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. Nondiscrimination and non-conflict statements. Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. Books and records. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. Contractor shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will be provided to the Contractor. Neither party shall be liable for incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. Delivery. Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. Tax Compliance. Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 News releases by vendors: As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. Limitations of liability. No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. Warranty and Remedies: Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. Technology Restrictions on Use of Confidential Information

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all

information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, for Advanced Academic Programs and Addendum I
C. Clarifications

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____
BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**
MAYOR – Signature **MAYOR**

Date:_____

KNOX COUNTY LAW DIRECTOR'S OFFICE
CONTRACT NO. 26-105 (a)
APPROVED AS TO LEGAL FORM

_____ **KNOX COUNTY, TENNESSEE**
LAW DIRECTOR – Signature Gary Dugger
LAW DIRECTOR – Printed Name

Date: 2/20/2026

CONTRACTOR

_____ _____
AUTHORIZED SIGNATURE **CONTRACTOR – Printed Name**

SAVVAS LEARNING COMPANY LLC
COMPANY NAME

Date:_____

The Procurement Division of Knox County, Tennessee will receive sealed proposals for the provision of **Advanced Academics Program** as specified herein. Proposals must be received by **2:00 p.m.** on **October 14, 2025**. Late proposals will neither be considered nor returned.

Deliver Proposals To:

Proposal Number 3688
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, Tennessee 37917

The Proposal Envelope must show the Proposal Number, Proposal Name & Proposal Closing Date.

SECTION I PROPOSAL PREPARATION AND SUBMISSION

1.1 **ADDITIONAL INFORMATION:** Knox County wants requests for additional information routed to Jay Garrison, Procurement Coordinator, CPPO, CPPB at 865.215.5767. Questions may be faxed to 865.215.5778 or emailed to jay.garrison@knoxcounty.org. If you have not heard from the Buyer in a reasonable amount of time, please call for further assistance. Information about the Knox County Procurement Division and current solicitations may be obtained on the Internet at www.knoxcounty.org/procurement.

1.2 **ACCEPTANCE:** Vendors shall hold their price firm and subject to acceptance by Knox County for a period of one hundred twenty (120) business days from the date of the proposal closing, unless otherwise indicated in their proposal.

1.3 **ALTERNATIVE PROPOSALS:** Knox County will not accept alternate proposals (those not equal to specifications) unless authorized by the Request for Proposal.

1.4 **AUDIT HOTLINE:** Knox County has established an Audit Hotline to report potential fraud and waste. To report potential fraud, waste or abuse, please file a report online by accessing http://www.knoxcounty.org/audit/hotline.php.

Vendors are hereby cautioned that this Audit Hotline does not replace the Award Protest Procedures found in Section VI, Item M of the Knox County Procurement Regulations.

1.5 **AWARD:** Award will be made to the most responsive, responsible proposer(s) meeting specifications and presenting the product(s) and/or service(s) that is in the best interest of Knox County. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple award. Knox County reserves the right to not award this proposal. Award will be made in accordance with the evaluation criteria specified herein.

1.6 **BUSINESS OUTREACH PROGRAM:** Knox County has established a Business Outreach Program which has the responsibility of increasing opportunity for small, minority and women owned businesses. This is being accomplished through community education programs, policy edification, active recruitment of interested businesses and process re-engineering.

Knox County is committed to ensuring full and equitable participation for all disadvantaged businesses. Knox County welcomes submittals from those disadvantaged businesses that have an interest in providing goods and/or services listed herein. In addition, Knox County strongly encourages the inclusion of disadvantaged businesses by non-disadvantaged Contractors who wish to partner or subcontract portions of this agreement in order to accomplish the successful delivery of goods and/or services. If you are a disadvantaged business and would like additional information about our Business Outreach Program, please contact:

Diane Woods, Business Outreach Administrator
Telephone: 865.215.5760
Fax: 865.215.5778
Email: diane.woods@knoxcounty.org

1.7 **CONFLICT OF INTEREST:** Vendors must have read and comply with the "Non-Conflict of Interest" statement provided in the vendor registration process prior to the closing of this solicitation. Knox County's Non-Conflict of Interest Policy is available for review at https://www.knoxcounty.org/purchasing/conflict_policy.php.

1.8 **COPIES:** Knox County requires that proposals be submitted as one (1) marked as original and one (1) exact copy. **Proposers must submit with their written response an exact electronic version of their proposal in a single PDF file on a flash drive format.**

1.9 **DECLARATIVE STATEMENTS:** Any statement or words (e.g.: must, shall, will) are declarative statements and the vendor must comply with the condition. Failure to comply with any such condition may result in the proposal being considered non-responsive and disqualified.

1.10 **ELECTRONIC TRANSMISSION OF PROPOSALS:** Knox County's Procurement Division will not accept electronically transmitted proposals. Facsimile and email submissions are strictly prohibited. Due to the nature of the information requested, all submissions shall be in written format.

1.11 **HOW TO DO BUSINESS:** Knox County utilizes a web-based Procurement software system, "KnoxBuys." The system provides our clients (vendors, county departments and the citizens of Knox County) with a more enhanced and end-user friendly means of accessing our services. The system allows for on-line vendor registration and maintenance, electronic receipt of purchase orders, on-line retrieval and submittal of quotes, bids and proposals for our vendor-clients and on-line requisitioning and receiving for our county departments. In order for the County to maximize its investment and minimize the cost associated with office operations, we need your help. When doing business with Knox County, we are urging you to please go to our website at www.knoxcounty.org/procurement, register as a vendor in our on-line Procurement system, "KnoxBuys," if you have not done so and whenever possible to conduct your business with the County through this site. If you have any questions, please contact the Procurement Division Representative listed in Section 1.1 of this document.

1.12 **INCURRED COSTS:** Knox County will not be responsible for any costs incurred by the proposer in the preparation of their proposal.

1.13 **MULTIPLE PROPOSALS:** Knox County will consider multiple proposals that meet specifications.

1.14 **NON-COLLUSION:** Proposers, by submitting a signed proposal, certify that the accompanying proposal is not the result of, or affected by, any unlawful act of collusion with any other person or company engaged in the same line of business or commerce, or any other fraudulent act punishable under Tennessee or United States law.

1.15 **PAYMENT METHOD:** Knox County will utilize a Purchase Order for placing an order for products and/or services. Purchase Orders will be issued from the Knox County Procurement Division via the method selected by the vendor during registration. The Purchase Order will detail the quantity, specific item(s) and the contracted price for each item. Work on this project must not commence until a signed Purchase Order is issued by Knox County Procurement.

1.16 **POSSESSION OF WEAPONS:** All vendors, their employees and their agents are prohibited from possessing any weapons on Knox County property without prior written consent from the County. In the case of a vendor whose Contract requires possession of firearms or other weapons to successfully complete their Contract, vendor must provide personnel who are bonded to bear said weaponry.

1.17 **PROCESSING TIME FOR PAYMENT:** Vendors are advised that a minimum of thirty (30) days is required to process invoices for payment.

1.18 **PROOF OF FINANCIAL AND BUSINESS CAPABILITY:** Vendors must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these specifications. Knox County will make the final determination as to the vendor's ability.

1.19 **PROPOSAL DELIVERY:** Knox County requires proposers, when hand delivering proposals, to time and date stamp the envelope before depositing it in the bid box. Knox County will not be responsible for any lost or misdirected mail sent by common carrier, nor will Knox County be responsible for proposals delivered to addresses or Suites other than the delivery address and Suite specified at the top of this solicitation. The time clock in the Procurement Division shall serve as the official record of time.

Solicitations must be in a sealed envelope/box prior to entering the Procurement Division office. Procurement Division personnel are not allowed to see the submittal nor assist in placing documents in an envelope/box. Additionally, the Procurement Division is not responsible for providing materials (e.g. envelopes, boxes, tape) for submittals.

1.20 **RECYCLING:** Knox County, in its continuing efforts to lessen the amount of landfill waste and to further recycling efforts, requests that proposals being submitted on paper shall:

1.20.1 Be submitted on recycled paper;
1.20.2 Not include pages of unnecessary advertising;
1.20.3 Be made on both sides of each sheet of paper.

1.21 **RESTRICTIVE OR AMBIGUOUS SPECIFICATIONS:** It is the responsibility of the prospective proposer to review the entire Request for Proposal packet and to notify the Procurement Division if the specifications are formulated in a manner that would unnecessarily restrict competition. Any such protest or question regarding the specifications or proposing procedures must be received in the Procurement Division by **September 26, 2025 at 4:30 p.m. local time**. These requirements also apply to specifications that are ambiguous.

1.22 **SIGNING OF PROPOSALS:** In order to be considered, all proposals must be signed. Please sign the original in blue ink. By submitting a signed letter authorizing the submission of the proposal, the vendor acknowledges and accepts the terms and conditions stated in the proposal document.

1.23 **TAXES:** Knox County purchases are not subject to taxation. Tax exemption certificates will be provided upon request.

1.24 **TITLE VI OF THE 1964 CIVIL RIGHTS ACT AND TITLE IX OF THE EDUCATIONAL AMENDMENT OF 1972:** "Nondiscrimination in Federally Assisted Programs"—"No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." 42 U.S.C. Section 2000. It is the policy of Knox County Government that all its services and activities be administered in conformance with the requirements of Title VI and Title IX.

1.25 **UNFORESEEN CIRCUMSTANCES:** During periods of closure due to unforeseen circumstances in Knox County or closures at the direction of the Knox County Mayor, the Procurement Division will enact the following procedures in regard to solicitations and closures:

- If the Mayor closes the Administrative offices prior to the time set for solicitation opening of any business day, all solicitations due that same day will be moved to the next operational business day.
- Other unforeseen circumstances shall be at the sole discretion of the Procurement Director.
- Knox County shall not be liable for any commercial carrier's decision regarding deliveries during any unforeseen circumstances.

1.26 **USE OF PROPOSAL FORMS:** Vendors must complete the proposal forms contained in the proposal package. Failure to complete the proposal forms may result in proposal rejection.

1.27 **VENDOR DEFAULT:** Knox County reserves the right, in case of vendor default, to procure the articles or services from other sources and hold the defaulting vendor responsible for any excess costs occasioned thereby. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidder's list for twenty-four (24) months.

1.28 **VENDOR REGISTRATION:** Prior to the submission deadline for this solicitation, ***ALL PROPOSERS MUST*** be registered with the Procurement Division. If you are not already a registered vendor with Knox County, register on-line at our website at www.knoxcounty.org/procurement and click on "Knox Buys" and then select "Online Vendor Registration." Vendors must be registered with the Procurement Division **prior** to submitting their proposal. Knox County shall not be responsible for technical difficulties experienced by vendors trying to register electronically less than twenty-four (24) hours prior to the proposal closing time.

1.29 **WAIVING OF INFORMALITIES:** Knox County reserves the right to waive minor informalities or technicalities when it is in the best interest of Knox County.

SECTION II OBLIGATIONS, RIGHTS AND REMEDIES

These terms and conditions shall be part of the Contract. Knox County reserves the right to negotiate other terms and conditions it deems appropriate and necessary under the circumstances to protect the public's trust.

2.1 **ALTERATIONS OR AMENDMENTS:** No alterations, amendments, changes, modifications or additions to this Contract shall be binding on Knox County without the prior written approval of the County.

2.2 **APPROPRIATION:** In the event no funds are appropriated by Knox County for the goods or services in any fiscal year, or insufficient funds exist to purchase the goods or services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

2.3 **ASSIGNMENT:** Contractor shall not assign or sub-contract this agreement, its obligations or rights hereunder to any party, company, partnership, incorporation or person without the prior written specific consent of Knox County.

2.4 **BOOKS AND RECORDS:** Vendor shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices at all reasonable times during the Contract period and for five (5) years from the date of the final payment under this agreement for inspection by County or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Vendor's costs of manufacturing, acquiring or delivering the products and services governed by this agreement.

2.5 **CHILD LABOR:** Contractor agrees that no products or services will be provided or performed under this Contract that have been manufactured or assembled by child labor.

2.6 **COMPLIANCE WITH ALL LAWS:** Contractor is assumed to be familiar with and agrees to observe and comply with all Federal, State, and Local laws, statutes, ordinances, and regulations in any manner affecting the provision of goods and/or services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

2.7 **CRIMINAL HISTORY RECORDS CHECK:** Any and all successful proposers, Contractor's employees, Contractor's subcontractors and the employees of any subcontractors must submit to a criminal history records check at the Contractor's expense, conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413. Proposers **must** submit with their proposals the Criminal History Affidavit of Compliance.

2.8 **DEFAULT:** If Contractor fails to perform or comply with any provision of this Contract or the terms or conditions of any documents referenced and made a part hereof, Knox County may terminate this Contract, in whole or in part, and may consider such failure or noncompliance a breach of Contract. Knox County expressly retains all its rights and remedies provided by law in case of such breach, and no action by Knox County shall constitute a waiver of any such rights or remedies. In the event of termination for default, Knox County reserves the right to purchase its requirements elsewhere, with or without competitive solicitation.

2.9 **GOVERNING LAW; VENUE:** This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

2.10 **INCORPORATION:** All specifications, drawings, technical information, Request for Proposal, Proposal, Award and similar items referred to or attached or which are the basis for this Contract are deemed incorporated by reference as if set out fully herein.

2.11 **INDEMNIFICATION—HOLD HARMLESS:** Contractor shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of Contractor, its subcontractors, suppliers, agents or employees.

2.12 **INDEPENDENT CONTRACTOR:** Contractor shall acknowledge that it and its employees serve as independent contractors and that Knox County shall not be responsible for any payment, insurance or incurred liability.

2.13 **INSPECTION AND ACCEPTANCE:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

2.14 **IRAN DIVESTMENT ACT:** By submission of this Request for Proposal response, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

2.15 **LIMITATIONS OF LIABILITY:** In no event shall Knox County be liable for any indirect, incidental, consequential, special or exemplary damages or lost profits, even if Knox County has been advised of the possibility of such damages.

2.16 **NO BOYCOTT OF ISRAEL:** Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the Contract engage in, a boycott of Israel. Proposers must submit with their proposals the completed Iran Divestment Act/No Boycott of Israel Affidavit.

2.17 **NON-DISCRIMINATION AND NON-CONFLICT STATEMENT:** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex **or** national origin any individual trait or characteristic found to be an illegal consideration, shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this agreement or in the employment practices of vendor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination. Contractor covenants that it complies with the Fair Wage and Hour Laws, the National Labor Relations Act, and other Federal and State employment laws as applicable. Contractor covenants that it does not engage in any illegal employment practices.

Contractor covenants that it has no public or private interest and shall not acquire directly or indirectly any interest that would conflict in any manner with the provision of its goods or performance of its services. Contractor warrants that no part of the total Contract amount provided herein shall be paid directly or indirectly to any officer or employee of Knox County as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor or consultant to Contractor in connection with any goods provided or work contemplated or performed relative to the agreement.

2.18 **ORDER OF PRECEDENCE:** In the event of inconsistent or conflicting provision of this Contract and referenced documents, the following descending order of precedence shall prevail: (1) Contract, (2) Request for Proposal, (3) Contractor's Response, (4) Award, (5) Special Terms and Conditions, (6) General Terms and Conditions, (7) Specifications, (8) Drawings.

2.19 **REMEDIES:** Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in Contract and in tort, including but not limited to, rejection of goods, rescission, and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

2.20 **RIGHT TO INSPECT:** Knox County reserves the right to make periodic inspections of the manner and means the service is performed or the goods are supplied and warehoused.

2.21 **SEVERABILITY:** If any provision of this Contract is declared illegal, void or unenforceable, the remaining provisions shall not be affected but shall remain in force and in effect.

2.22 **TAX COMPLIANCE:** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal or proposal and signature, it is current in its respective Federal, State, County, and City taxes of whatever kind or nature, and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Procurement Division.

2.23 **TERMINATION:** County may terminate this agreement with or without cause at anytime. In the event of termination by either party, fees due for services satisfactorily performed or goods accepted prior to the termination date shall be paid. Contractor shall not perform additional work without the expressed permission of County. In the event Contractor intends to interrupt or discontinue service under this Contract, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

2.24 **WARRANTY:** Contractor warrants to Knox County that all items delivered and all services rendered shall conform to the specifications, drawings, solicitation and/or other descriptions furnished and/or incorporated by reference, and will be fit for the particular purpose purchased of merchantable quality, good workmanship, and free from defects. Contractor extends to Knox County all warranties allowed under the U.C.C. Contractor shall provide copies of warranties to the County upon request. Return of merchandise not meeting warranties shall be at contractor's expense.

SECTION III SPECIAL TERMS AND CONDITIONS

3.1 **INTENT:** The intent of this document is to set forth and convey to prospective proposers the general requirements for vendors to provide Knox County Schools with Advanced Academic Programs as desired by Knox County and Knox County Schools (KCS). Award will be based on Best Value. Best value means more than low cost. It includes cost, technical service quality, experience, qualifications and other factors detailed herein.

3.2 **ACCEPTANCE:** Vendors are advised that the payment of an invoice does not necessarily constitute as an acceptance of services that are provided. Acceptance requires a specific written action by Knox County so stating.

3.3 **ADDITIONS OR DELETIONS:** Knox County reserves the right to add or delete services as the need arises. If services are to be added, Knox County and the Contractor will arrive at a mutually agreed price. Any additions or deletions must be approved in writing by Knox County Procurement prior to any changes in service.

3.4 **AWARD LENGTH:** The pricing for this Contract must remain firm for thirty-six (36) months. However, due to the funding source Knox County does not allow automatic renewals, this Contract will need to be extended annually to continue services. Knox County will draft the Extension of Contract and send it to the vendor approximately ninety (90) days before expiration. The agreement may be renewed for two (2) one-year periods upon mutual consent, for a possible total of five (5) years. Following the initial thirty-six (36) months, the Contractor may request a change in price.

3.5 **CHANGES AFTER AWARD:** It is possible that after award, Knox County might change its needs or requirements. Knox County reserves the right to make such changes after consultation with the vendor. Should additional costs arise, Knox County reserves the right to consider accepting these charges provided the vendor can document the increased costs. Knox County also reserves the right to accept proposed service changes from the vendor if they will lower the cost to Knox County and/or provide improved service.

3.6 **COMMUNICATION:** The successful execution of this contract will require extensive communication between all involved parties. While information may be transmitted via telephone, it should always be followed up with an email. It is essential that the Contractor have an efficient email capabilities. The Contractor will be required to submit a list of individuals, along with direct phone numbers, cell phone numbers and email addresses for the agency's contacts. These individuals must be familiar with the Knox County Contract and have authority to make adjustments as requested by Knox County.

3.7 **COMPLIANCE WITH ALL APPLICABLE REGULATIONS:** Vendor agrees and covenants that the company, its agents and employees will comply with all City, County, State and Federal codes, laws, rules and regulations applicable to the business to be conducted under this contract. If the vendor performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, the vendor shall bear all costs arising from such work.

3.8 **CONTACT PERSONNEL:** Essential to the success of this Contract is the development of a good working relationship between the vendor and Knox County. It is imperative that the Knox County account be handled efficiently and professionally. Knox County should be assigned no more than two (2) vendor contacts to handle billing inquiries and service related issues. In the event on or both contacts leave the Knox County account, the vendor shall formally introduce the new contacts to Knox County personnel. These contacts must be knowledgeable of the County's account to avoid an interruption of service.

3.9 **CONTRACT EXECUTION:** The award of this proposal may result in a Contract between Knox County and the successful vendor(s). The Contract may require Knox County Board of Education and/or Knox County Commission approval. The successful vendor(s) may be required to be present at the Board of Education and/or County Commission meeting(s) to answer questions relating to the service to be performed. Adequate notification will be given by Knox County Procurement Division if the awarded vendor(s) will need to attend meetings. There shall be no cost to Knox County for attendance of the vendor(s). Knox County will draft the Contract. The Knox County Procurement Division will not accept any vendor's contract. A sample contract is under Exhibit B for review. If Master Agreements, Service Agreements, Terms and Conditions or other contract agreements are submitted they will not be accepted.

3.10 **CONTRACTOR DUTIES:** At the Contractor's own expense, the Contractor shall:

3.10.1 Provide competent supervision;
3.10.2 Provide competent personnel;
3.10.3 Take precautions necessary to protect persons or property against injury or damage and be responsible for any such damage or injury that occurs as a result of their fault or negligence.

3.11 **DESTINATION AND DELIVERY:** All shipments that are to be delivered must be Free on Board Destination to the department ordering the items. All shipping charges are to be included in the unit price of each item. All deliveries must be unloaded and delivered inside to the department location that is ordering the items.

3.12 **EVALUATION CRITERIA:** This proposal will be evaluated using the following criteria:

As per Section 1.5, Knox County will determine the award structure that is in its best interest.

Methodology	30 Points
Delivery of Service	30 Points
Experience & References	20 Points
Cost	20 Points

Knox County may select an Evaluation Committee for this solicitation to thoroughly review and score all submitted responsive and responsible proposals. Each evaluator will have the ability to award up to one hundred (100) points, based on the Evaluation Criteria, per submission.

3.13 **EVALUATION REVIEW:** Knox County reserves the right to use all pertinent information (including information learned from sources other than disclosed in the Request for Proposal process) that might affect the County's judgment as to the appropriateness of an award to the best evaluated vendor(s). This information may be appended to the proposal evaluation process results. Information on a service provider from reliable sources, and not within the service provider's proposal, may also be noted and made part of the evaluation file. Knox County shall have sole responsibility for determining a reliable source. Knox County reserves the right to conduct written and/or oral discussions/interviews after the proposal closing. The purpose of such discussions/interviews is to provide clarification and/or additional information to make an award that is in the best interest of Knox County.

3.14 **EXCEPTIONS TO SPECIFICATIONS:** Vendors taking exception to any part or section of these specifications shall indicate such exceptions on their submittal. A failure to indicate any exception(s) shall be interpreted as the vendor's intent to fully comply with the specifications as written. Conditional or qualified offer are subject to rejection in whole or in part. Any exceptions shall be included in Section V, Tab VIII of the submittal. **Do not strike through or in any other way alter the Request for Proposal. Exceptions listed within other sections of the submittal shall not be reviewed or considered.**

3.15 **GRANT FUNDING:** The products or services being procured under this solicitation are being funded by Federal Grant money. All awarded vendors will be required to adhere to Exhibit A of this solicitation in the performance of the Contract.

3.16 **GRATUITIES AND KICKBACKS:** It shall be a breach of ethical standards for any person or company to offer, give, or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim, or controversy or other particular matter, pertaining to any program requirement of a contract or subcontract or to any solicitation or proposal therefore. It shall be a breach of ethical standards for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or a person associated therewith, as an inducement for the award of a subcontract or order. Breach of the provisions of this paragraph is, in addition to a breach of this Contract, a breach of ethical standards which may result in civil or criminal sanction and/or debarment or suspension from being a contractor or subcontractor under Knox County contracts.

3.17 **IDENTIFICATION:** Employees of the Contractor shall have proper photo identification displayed at all times while on property belonging to Knox County.

3.18 **INSURANCE:** The successful vendor(s) must carry the insurance as indicated on the Insurance Checklist Attachment hereto. As proof of the vendor's willingness to obtain and maintain the insurance, the vendor must complete, sign and have its insurance agent sign the attachment and submit it with the proposal. Upon the Notification of Intent to Award, the successful vendor will be required to submit a Certificate of Insurance (COI) including any corresponding endorsement page(s) with the specified coverage and listing Knox County as an additional insured. It shall be the successful vendor's responsibility to keep a current COI and endorsement page(s) on file with Knox County Procurement for as long as the contract is in effect.

3.19 **INTERPRETATION:** No oral interpretation will be made to any vendor regarding the meaning of specifications or the Scope of Work. All questions are to be submitted in writing via email and will be answered in the form of an addendum to the solicitation by the Knox County Procurement Division, if applicable.

3.20 **INVOICE DETAIL:** Knox County is requesting invoices to show the following detail to help expedite review and payment. The Contractor(s) may be required to modify invoicing procedures to show the detail. All potential Contractors are hereby cautioned that Knox County will only pay from original invoices and not facsimiles or copies. Invoices which do not adhere to these details may be returned to the Contractor for correction.

3.20.1 The invoice must show the amount due to the Contractor by Knox County;
3.20.2 The invoice must show a summary of completed work;
3.20.3 Invoices are to be original and uniquely pre-numbered;
3.20.4 Invoices which do not show this information are subject to rejection.

3.21 **INVOICING PROCEDURES:** Knox County requests that invoices be easy to read and understand. Invoices are to be original and uniquely pre-numbered. There shall be no additional charge for this information and these procedures to be included. Each invoice shall include a summary of service(s) provided and shall list the associated unit price. Supporting documentation shall be included with invoices as applicable. Invoices without this information will be returned to the Contractor for correction.

Invoices shall be sent to the billing address indicated on the Purchase Order. Each department or division of Knox County is responsible for its own budget. Departments cannot charge or pay bills for another department. Therefore, it is critical that the successful Contractor's invoices specify the correct department. Do not credit payments to another department's account. Invoices must be submitted in triplicate and must match the corresponding Purchase Order number. There shall be no component billing. Mail invoices for Knox County Schools to:

Knox County Schools Finance Department
Post Office Box 2188
Knoxville, TN 37902-1805
invoices@knoxschools.org

3.22 **INVOICE REVIEW:** Knox County shall review all invoices for adherence to the terms and conditions of the Contract. Variations from the Contract and Contract pricing are strictly prohibited. Any variance found on the invoice will result in rejection of that invoice. Rejected invoices will be returned to the Contractor(s) for correction. Repeated variations may result in termination.

3.23 MINIMUM QUALIFICATION EXPECTATIONS:

3.23.1 Respondent must address all submittal requirements as defined under Section IV.

3.23.2 Respondent shall have a minimum of five (5) years of experience and sufficient capabilities to carry out the work contemplated, as well as the equipment and personnel available for the work.

3.23.3 If the respondent has a permanent office in Knox County, respondent must have a current business license issued by Knox County.

This requirement also applies to any of the Respondent's proposed subcontractors or subconsultants with a permanent office in Knox County. A Knox County business license is not required of any Respondent or proposed subcontractor or subconsultant who does not have a permanent office in Knox County. For more information, contact the Knox County Clerk's office at 865.215.2392.

3.24 NEGOTIATION: Knox County may select a successful proposer on the basis of initial offers received without discussions. Therefore, each proposal shall contain the proposer's best terms from a cost or price and service standpoint. Knox County reserves the right to enter into Contract negotiations with the highest-rated proposer. If Knox County and the selected proposer cannot negotiate a successful agreement, Knox County may terminate said negotiations and begin negotiations with the next highest-rated proposer. Knox County retains the right to negotiate with multiple proposers simultaneously. This process will continue until an agreement has been reached or all proposers have been rejected. No proposer shall have any rights against Knox County arising from such negotiations.

3.25 NEWS RELEASES BY VENDORS: As a matter of policy, Knox County does not endorse the services of a Contractor. A Contractor will not make news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County.

3.26 NO CONTACT POLICY: After the date and time that the vendor receives this solicitation, any contact initiated by any proposer with any Knox County representative, other than the Procurement Division representative listed herein, concerning this Request for Proposal, is strictly prohibited. Any such unauthorized contact may cause the disqualification of the proposer from this procurement transaction.

3.27 OFFER WITHDRAWAL: No proposal can be withdrawn after it is filed unless the proposer makes a request in writing to the Knox County Procurement Division prior to the time set for the closing of proposals or unless the County fails to accept within one hundred twenty (120) business days after the date fixed for the closing the Request for Proposal.

3.28 ORAL PRESENTATION/INTERVIEW: Knox County may require proposers to give oral presentations/interviews in support of their proposal or to exhibit or otherwise demonstrate the information contained therein. These presentations/interviews may be conducted virtually through video conferencing or in person.

Knox County reserves the right to request oral presentations and/or interviews during the initial evaluation phase. The County also reserves the right to complete the initial evaluation phase and then request oral presentations and/or interviews from all proposers or the highest rated proposers. In this case, the evaluations may be revised based on additional information received during presentations.

3.29 PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of thirty-six (36) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

3.30 **PROPOSAL CONTENT:** The proposer's response must contain a thorough description of the background of the proposer and sufficient evidence showing that the proposer is capable of providing the services. The proposer's response must thoroughly expound on the proposer's understanding of how the proposed services will meet Knox County's needs. The proposal must also contain an explanation of the implementation plan and the proposer's ongoing commitment to service.

3.31 **PROPOSAL EVALUATION:** In evaluation of submitted proposals, Knox County reserves the right to use any or all of the ideas from the proposals submitted without limitation and to accept any part or the entire successful proposal in selecting an operation which is judged to be in the best interest of Knox County. All material submitted becomes property of Knox County.

3.32 **PROPOSAL FORMAT:** This solicitation is in the Request for Proposal format. As the specified date and time, each proposer's name will be publicly read aloud. No further information will be given at that time. Evaluation of the proposals will proceed as expeditiously as possible and successful, as well as unsuccessful, notification will be given.

3.33 **PROPOSER OBLIGATION:** Proposers shall become fully acquainted with conditions relating to the scope of the work detailed in this Request for Proposal. Failure to become acquainted with the existing conditions shall in no way absolve the proposer of any obligations with respect to this Request for Proposal or the Contract.

3.34 **PUBLIC RECORDS ACT:** Knox County is subject to the Tennessee Open Records Act 10-7-503 et seq. Proposers are cautioned that all documents submitted on behalf of this Request for Proposal shall be open to the public for viewing and inspection.

3.35 **QUANTITIES:** Knox County does not guarantee any quantity of services will be utilized under this solicitation. Services will be utilized on an as needed basis.

3.36 **REJECTION OF PROPOSALS:** Knox County reserves the right to reject any and all proposals received as a result of this request and to waive any informality, technical defect or clerical error in any proposal, as the interests of Knox County may require. Non-acceptance of any proposal will be devoid of any criticism of the proposal and of any implication that the proposal is deficient in any manner. Non-acceptance of any proposal shall be construed as meaning simply that the County does not deem the proposal acceptable or that another proposal was deemed more advantageous to Knox County for the particular services proposed.

3.37 **REMOVAL OF CONTRACTOR'S EMPLOYEES:** Contractor agrees to utilize only experienced, responsible and capable people in the performance of the work. Knox County may require that the Contractor remove from the job covered by this Contract, including employees who endanger persons or property or whose continued employment under this Contract is inconsistent with the interest of Knox County.

3.38 **SUBMIT QUESTIONS:** Prospective proposers may submit questions concerning this solicitation until **September 26, 2025 at 4:30 p.m. local time**.

3.39 **SUSPENSION AND DEBARMENT:** Vendor will notify Knox County Government if they become suspended, debarred, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities during the term of this proposal and during the term of any subsequent Contract for service.

3.40 **TENNESSEE REGISTRATION:** The successful proposer must meet any applicable State of Tennessee registration requirements.

SECTION IV SCOPE OF WORK

4.1 **BACKGROUND:** Knox County Schools (KCS) is a public education agency. It is responsible for the education of children from preschool through high school. There are approximately fifty-nine thousand (59,000) Pre-K through 12th-grade students and approximately seven thousand eight hundred (7,800) employees. For purposes related to this RFP, the district is comprised of ninety-two (92) schools that represent urban, suburban, and rural populations.

4.2 **FACILITIES & EQUIPMENT:** All facilities for training in Knoxville, TN will be provided by Knox County Schools. Upon request, Knox County will provide a computer and projection system, with accommodations for trainers to use their own computers.

4.2 **PARTICIPANTS:** The number of participants may vary. Vendors may work with an entire school/department staff, smaller school content teams and/or district teams, individuals, or any combination thereof. A defined number of training sessions or participants is not guaranteed. Participants will be staff members serving our students.

4.3 **PROGRAM CONTENT & METHODOLOGY:** Knox County Schools is seeking vendors to partner with our schools and district to provide high quality, rigorous academic programming for 9th through 12th grades which prepares our students to be successful in their next phase of life. The program must promote academic excellence and equity in the Early Postsecondary Opportunities, (EPSO), as listed on the Tennessee Department of Education website and listed in the Ready Graduate and/or College and Career Readiness accountability indicator.

More information on EPSO can be found at the following link: https://www.tn.gov/education/students/early-postsecondary.html

The Advanced Academics organization should provide a comprehensive program to include courses/curricular frameworks, assessments, services and supports that provide opportunities for students to demonstrate college and career readiness and have the potential to earn postsecondary credit. The curricular program should be of high-quality which includes discipline specific critical thinking, inquiry, reasoning and communication skills. The programming of the courses should support and encourage learner potential by challenging students to inquire skillfully, think critically, and reflect meaningfully. Students should have the opportunity to engage in learning across all content areas with an informed curiosity that will equip students to be successful in their future endeavors. These areas must be inclusive of, but not limited to: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education Fields, and Sciences. Programs must also offer courses individually and as a full diploma package. Upon completion of the learning, students should have the opportunity to demonstrate their mastery with a rigorous assessment that could culminate in credit through academically competitive colleges and universities.

The program must have or be actively in the process of developing a clear scope and sequence of support through its framework for instruction for students and teachers to identify and prepare students with potential in earlier grades (prior to the 9th grade), so schools can increase the percentage of KCS students in advanced coursework. Proposers must provide a comprehensive narrative statement detailing the scope and sequence of support utilized. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.

The program additionally should include services and supports for school and district staff that will prepare them to facilitate student progress in the program. Professional learning and training should include teachers as well as other staff members and administrators for schools and the district. The vendor must provide sustainable professional development through in-person trainings, with options for virtual meetings/trainings or video resources. There should also be teacher support materials provided digitally and/or in person which support the academic rigor of the program.

4.5 **DELIVERY OF SERVICE:** Proposers must provide comprehensive narrative statements that outline the implementation plan for their program. The implementation plan should clearly support, streamline and provide accountability for the identified deliverables. This plan may include operational recommendations for KCS that will improve the efficiency and efficacy of the program.

The program deliverables include:

- Supports for student content and skill development beginning minimally in the 9th grade.
- Alignment with Early Postsecondary Opportunities (EPSO).
- Opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit through both individual and full diploma package courses with rigorous assessments that may culminate in postsecondary credit, aligning with university admissions guidelines;
- Courses/curricular frameworks for multiple content areas including Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences with discipline specific critical thinking, inquiry, reasoning and communication skills.
- A scope and sequence of support, either in place or in development, utilized to identify student potential prior to the 9th grade that can increase the percentage of students in underserved populations in advanced coursework.
- Services and supports that prepare school and district staff to facilitate student progress in the program through in-person trainings with options for virtual meetings/training and video resources.

- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

4.6 **EXPERIENCE:** Proposers are to detail their organization's previous experience working with schools, districts, states, and/or countries to promote high levels of academic rigor for all learners which results in the opportunity to earn postsecondary credit. For applicable team members, proposers are to submit education credentials and relevant work experience that supports the program sought by this RFP. This information is to be submitted in Section V, Tab V of the Proposal.

Proposers must provide three (3) references relating to work of a similar scope completed within the last five (5) years. Include the name of the agency or institution, point of contact with both a telephone number and email address, and the nature and size of the Contract. **Do not list Knox County Government or Knox County Schools as a reference.** References shall be submitted on Attachment B of this RFP.

SECTION V PROPOSAL FORMAT

PROPOSAL INFORMATION: The following guidelines should be followed when responding to the Request for Proposal. Negligence in adhering to the criteria listed below will be considered when reviewing the responses and evaluating the proposers. Knox County reserves the right to reject any proposal for failure to comply with the requested response specifications. The County reserve the right to amend the Request for Proposal by addendum prior to the final date of proposal submission.

- Knox County requests proposals be in sufficient detail to address all requirements.
- The County requests responses be submitted in a three-ring binder containing sections separated by tabs. Do not submit spiral bound or glued responses.
- Please submit one (1) marked original and one (1) exact copy.
- Page numbers should be placed on the bottom center of pages.
- Proposers shall also submit an exact copy of the original proposal on a Flash drive. **This shall be in one (1) complete pdf file. Do not include multiple folders on the Flash drive.**

PROPOSERS MUST HAVE THEIR BINDERS IN THE EXACT FORMAT LISTED BELOW.
Each proposal must address all questions/statements listed in each tab completely.

TAB I COVER LETTER

Include cover letter authorizing the submission of the proposal signed by the principal of the company.

TAB II COMPANY PROFILE

- Company Name, Address Telephone/Fax numbers
- Contact name(s) and information
- Proposer's Vendor Number as assigned by Knox County
- Employer Identification Number (EIN)
- Knox County Business Tax License for Organization (if applicable)
- Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)
- Will you accept E-commerce for payment as detailed in Section 1.14?
- Acknowledgement of the receipt of any Addendum issued

TAB III PROGRAM CONTENT & METHODOLOGY (30 Points)

Proposers must demonstrate an understanding of Knox County's needs and fully explain their overall approach to meet the County's requirements. This must thoroughly describe how the proposed services will meet the requirements outlined in Section 4.4. Proposer must clearly address the following:

- Describe how the program aligns with Early Postsecondary Opportunities (EPSO).
- Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit.
- Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills.
- Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered.
- Describe the courses that are offered individually as well as those that are offered as a full diploma package.
- Outline the assessment process(es) and opportunities to earn college/university credit.
- Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.
- Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program
  - Detail the professional development models available and teacher support materials associated with the program.
- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

TAB IV **DELIVERY OF SERVICES (30 POINTS)**

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule.

- Courses/curricular frameworks for multiple content areas;
- Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines;
- Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;
- Training and/or professional learning offerings about the services and supports included in the program; and
- Supports for student content and skill development beginning minimally in the 9th grade.
- Proposers do not have to provide complete curriculum. Samples are sufficient.

TAB V **EXPERIENCE AND REFERENCES (20 Points)**

Proposers are to detail the Company's experience relating to the services requested in this RFP, specifically:

- Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s).
- Proposers must describe the organization's experience with similar projects.
- Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP. Information about each person listed should include their a) title b) resume, including advanced education credentials, relevant work experience, demonstrated outcomes, independent research, and publishing in the subject areas addressed by this RFP, as applicable c) number of years with the organization and d) description of the type of work the individual will perform
- References (Attachment B)

TAB VI **PROPOSED COSTS (20 Points)**

Costs proposals must include all direct and indirect costs associated with the performance of the service. Proposed costs should be inclusive of all expenses. Proposer may include the methodology used to determine their proposed cost. Pricing must include all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. There will be no reimbursement for any such charges.

Per Attachment A, please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- Annual Candidacy/Membership Fees
- School Application Fees
- Annual Program or Curriculum Fees
- Curricular Materials
- Exam Fees
- Professional Development (inclusive of materials and travel expenses, as applicable)
  - o On-Site Format
  - o Webinar/Virtual Format
- Other Expenses
- Optional Features/Add-Ons

NOTE: This tab shall only be included in the original document and the exact electronic version. This tab is to be submitted under separate cover from the other parts of the vendor's proposal. This tab will be reviewed after the other sections of the vendor's proposal have been reviewed and scored.

TAB VII **OTHER INFORMATION**

Proposers may include any other information deemed pertinent to this solicitation.

TAB VIII **EXCEPTIONS**

Please note any and all exceptions taken to any part this Request for Proposal. If none are taken, please clearly state so. Do not mark through or otherwise alter the language of this RFP in your response.

TAB IX **ATTACHMENTS**

- Pricing (Attachment A)
- Insurance Checklist (Attachment C)
- Criminal History Check Affidavit (Attachment D)
- Iran Divestment Act (Attachment E)
- General Federal Funding Requirements (Exhibit A)

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$_____per school Notes:
Application Fees	$_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes:
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students:
Exam Fees	$_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site • Webinar/Virtual
Other Expenses:	
Optional Features/Add-ons:	

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: _____

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident) $1,000,000 BODY INJURY (Per–Person) BODY INJURY (Per-Accident) PROPERTY DAMAGE (Per-Accident
YES	4.	COMMERCIAL GENERAL LIABILITY	LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE $ 1,000,000
			FIRE LEGAL LIABILITY $ 100,000
			MED EXP (Per person) $ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY $ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE $ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE $ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2.000.000 ANNUAL AGGREGATE
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000
NO		PROFESSIONAL LIABILITY	
NO NO NO NO	10.	ARCHITECTS &ENGINEERS ASBESTOS & REMOVAL LIABILITY MEDICAL MALPRACTICE MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM $2,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)
NO	13.	MOTOR CARGO INSURANCE	
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$
NO	17.	DISHONESTY BOND	$
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.
NO	19.	USL&H	FEDERAL STATUTORY LIMITS

20. Carrier rating shall be Best's Rating of A-VII or better or its equivalent.

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.

23. Certificate of Insurance shall show the RFP number and title.

Insurance Agent's Statement and certification: I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.

Agency Name: _____Authorizing Signature: _____

Proposer's Statement and Certification: If awarded the Contract, I will comply with the Contract insurance requirements.

Proposer's Name: _____Authorizing Signature: _____

ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, _____, president or other principal

Officer of _____, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

_____
President or Principal Officer

For: _____
Name of Company

STATE OF TENNESSEE}
COUNTY OF }

Subscribed and sworn before me by _____,

President or principal officer of _____,

On this _____ day of _____ 2_____.

_____
Notary Public

My Commission expires: _____

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying,'' in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

OFFICE OF COUNTY MAYOR GLENN JACOBS

Procurement Division, 1000 N. Central Street, Suite 100, Knoxville, TN 37917

ADDENDUM I
REQUEST FOR PROPOSAL 3688
ADVANCED ACADEMIC PROGRAMS

ADDENDUM DATE: September 30, 2025

BUYER: Jay Garrison, CPPO, CPPB

ORIGINAL CLOSING DATE: October 14, 2025 at 2:00 PM

THE FOLLOWING IS TO BE AMENDED:

ATTACHMENT A, COST, WILL BE DELETED AND REPLACED WITH A NEW COST SHEET. SEE ATTACHED. FAILURE TO PROVIDE THE REVISED COST SHEET AND ALL REQUIRED ITEMS WILL BE JUST CAUSE TO DEEM YOUR SUBMITTAL AS NONRESPONSIVE.

SECTION 3.4 SHALL BE AMENDED TO THE FOLLOWING:

AWARD LENGTH: Knox County intends to issue a one (1) year award with an option to renew upon consent of both Knox County and the awarded Contractor. This term bid agreement may be renewed for an additional four (4) years, one (1) year at a time for a possible total of five (5) years. Knox County reserves the right to revoke the award if a pattern of unavailability arises with the successful proposer(s).

SECTION 3.29 SHALL BE AMENDED TO THE FOLLOWING:

PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of twelve (12) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

THE FOLLOWING IS FOR CLARIFICATION:

QUESTION 1: Could you please clarify whether the accrediting organization that issues any certifications to students must be Tennessee-based, or if national accreditation is acceptable?

ANSWER 1: National accreditation is acceptable.

QUESTION 2: We understand that Knox County intends to draft the contract. As a global provider of specialist exam services, we typically begin with a bespoke contract template that includes essential terms specific to our services—such as exam security protocols—which may not be covered in a standard agreement. This template has been successfully used as a starting point with many U.S. districts. For efficiency during the contracting phase, would Knox County be amenable to reviewing and potentially using our template as the basis for the agreement?

ANSWER 2: The County's Contract will take precedence over all other Contract documents. Proposers may submit a separate document with other terms and conditions, however, conflicting terms and conditions between the County's Contract and any other agreement will be governed by the County's Contract.

QUESTION 3: The RFP references Exhibit B as a sample contract, but it appears to be missing from the document. Could you kindly provide a copy?

ANSWER 3: See attached.

QUESTION 4: The RFP requests fixed pricing for the initial 36-month term. We typically offer fixed pricing with an annual inflationary adjustment. Could you advise on how Knox County would prefer suppliers to address inflationary increases in their proposals?

ANSWER 4: Knox County is amending this requirement to require fixed pricing for a period of 12 months from the date of contract commencement. No cost increases will be granted during any term of the contract.

QUESTION 5: Could you please clarify what is meant by "unit price" in this context? Is it intended to refer to pricing per student, per exam, per school, or another metric?

ANSWER 5: This requirement has been amended per the revised Cost sheet. See attached.

QUESTION 6: We have reviewed the Appendix C insurance requirements. Because we are an entity headquartered in the UK, we may not be able to comply with all of these requirements. Where we may need derogations e.g. it may not be possible to name you as an additional insured, how should we indicate this?

ANSWER 6: This requirement cannot be waived. The County must be named additionally insured on the policy. Upon a notice of award to a proposer(s), the successful proposer(s) will be required to submit a current Certificate of Insurance along with all endorsement pages naming Knox County as additionally insured.

QUESTION 7: Do you want us to list all the AP courses that Knox has currently bought from us?

ANSWER 7: No. This is a new, standalone solicitation and previous experience with Knox County will not be considered.

QUESTION 8: In regards to samples, we were going to send one copy of each course student edition. Do you require digital access as well?

ANSWER 8: Digital access is not required, but acceptable.

QUESTION 9: Would the district consider an all-digital platform to fulfill this RFP's scope of work?

ANSWER 9: No. The County will not accept an all-digital platform.

QUESTION 10: Can the curriculum be supplemental to the courses or must it be core curriculum?

ANSWER 10: The curriculum can be supplemental.

End of addendum.

Jay Garrison, CPPO, CPPB
Procurement Coordinator

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost.
- Digital resources that the teachers and/or students would need to fully implement the program.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost).
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost).
- Software Services

Total cost for the scenario: $_____

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

Exhibit B

Knox County Government

and

(Contractor)

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and (Contractor), hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. Terms of this Contract. This Contract commences on the 1st day of December 2025 and ends the 30th day of November 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. The County intends to issue a one-year (1) award. Upon the mutual agreement of the vendor and the County, the award may be extended for four (4) additional years, one (1) year at a time. This may result in a total of five (5) years. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. Subcontracting/partnerships: Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. Payment. Contractor warrants that the pricing shall remain firm for the initial one (1) year period. At the end of the first one (1) year period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a

SAMPLE

Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. Right to inspect. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. Nondiscrimination and non-conflict statements. Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. Books and records. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding

of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the

SAMPLE

Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, Terms and Conditions, etc., for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____

BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**

MAYOR – Signature **MAYOR**

Date:_____

SAMPLE

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO._____
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

_____
LAW DIRECTOR – Signature

_____
LAW DIRECTOR – Printed Name

Date:_____

CONTRACTOR

_____
AUTHORIZED SIGNATURE

_____
CONTRACTOR – Printed Name

(CONTRACTOR)
COMPANY NAME

Date:_____

SAMPLE

SAVVAS
LEARNING COMPANY



Knox County Procurement Division

Advanced Academic Programs
RFP 3688

TECHNICAL ORIGINAL

Due - October 14, 2025, 2:00 PM

Knox County Procurement Division
Attention: Jay Garrison, Procurement Coordinator
1000 North Central Street, Suite 100
Knoxville, Tennessee 37917

Savvas Learning Company LLC
15 East Midland Ave.
Suite 502
Paramus, NJ 07652
www.savvas.com

October 10, 2025

Jay Garrison, Procurement Coordinator
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, TN 37917

RE: Advanced Academic Programs / RFP 3688

Dear Mr. Garrison,

To support Knox County Schools in providing students in grades 9–12 with high quality, rigorous academic programming that prepares them for their next phase of life, Savvas Learning Company LLC is pleased to present our catalog of products from **Savvas Pathmaker,** our all-in-one solution to post-high school success.

Savvas PathMaker is designed to empower every student to graduate with confidence, equipping them with the skills, college credits, industry certifications, and transferable skills needed to thrive in the modern workforce. Savvas PathMaker allows students to mix and match options to create a personalized learning experience. This approach gives students the opportunity to discover their passions, develop essential skills, and prepare for college, career, or both.

Savvas PathMaker includes two products, *Outlier* by Savvas and Savvas CTE:

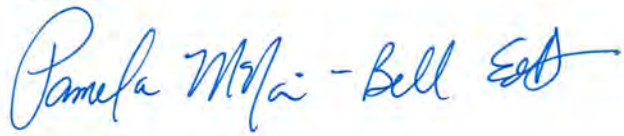
- ***Outlier* by Savvas** is our award-winning advanced academics program. With the *Outlier* mastery-based approach, students earn college credit based on overall course performance. Courses feature cinematically produced lectures by leading instructors and professors from renowned institutions, including NYU, Duke, and NASA.
- **Savvas CTE** provides innovative, online CTE courses that prepare students with the industry knowledge and skills needed for future careers. Specializing in career-focused courses and industry-based certification exam preparation, Savvas CTE offers students a wide range of virtual and blended learning solutions that engage students in career exploration and prepare them for the workforce. Savvas products align to national standards for CTE and higher education standards for Outlier.

As your trusted partner, we will assist with implementing learning solutions designed to help the students of Knox County Schools achieve their full potential.

If you have questions about this solution, please contact Tricia Seely, your account manager, at 615.450.5555 or *tricia.seely@savvas.com*. As the VP of Proposals for Savvas Learning Company, it is my pleasure to authorize the submission of this proposal.

SAVVAS
LEARNING COMPANY

Sincerely,



Pamela McNair-Bell, EdD
Vice President Proposals
Savvas Learning Company LLC
T: 404.831.5266 | E: proposals@savvas.com

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SAVVAS LEARNING COMPANY

Tab II: Company Profile

Requirement

- Company Name, Address Telephone/Fax numbers

Response

Company Name: Savvas Learning Company LLC
Address: 15 East Midland Avenue, Suite 502, Paramus, New Jersey, 07652
Telephone/Fax: 201.928.7770

Requirement

- Contact name(s) and information

Response

The primary contact for this response is Account Manager, Tricia Seely. She can be reached at tricia.seely@savvas.com or 615-450-5555.

Requirement

- Proposer's Vendor Number as assigned by Knox County

Response

The Savvas Vendor Number is 76816

Requirement

- Employer Identification Number (EIN)

Response

Our federal tax ID number is 82-4606641.

Requirement

- Knox County Business Tax License for Organization (if applicable)

Response

N/A

Requirement

- Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)

Response

N/A

Requirement

- Will you accept E-commerce for payment as detailed in Section 1.14?

Response

Yes

Requirement

- Acknowledgement of the receipt of any Addendum issued

Response

Savvas acknowledges receipt of any Addendum issued.

Tab III: Program Content and Methodology

Overview: Savvas PathMaker

A Head Start for College and Career Readiness

Savvas PathMaker, our new all-in-one digital solution for college and career readiness, gives students a head start on post-high school success. Students graduate equipped with the college course experience and credit recommendations, industry certification, and transferable skills needed to thrive in the modern workforce.

Featuring the award-winning *Outlier* by Savvas dual-enrollment courses[1] and our comprehensive catalog of innovative Savvas career and technical education (CTE) courses—including many that prepare students for industry-recognized certification exams—Savvas PathMaker gives students opportunities to discover their passions, develop skills and knowledge, and prepare for the next stage of their life, whether that involves entering the workforce, college, or both.



Educators can mix and match options to create customized student learning experiences that meet the unique labor market needs of their communities. Through Savvas CTE, students gain valuable skills needed for today's high-interest, high-paying jobs, while *Outlier* offers online, asynchronous dual enrollment courses that enable students to earn high school credit and college credit recommendations.

Through a combination of digital learning and decades of education research, our Savvas PathMaker portfolio delivers immersive experiences tailored to a wide range of learning needs to prepare students for success in college and career.

[1] Dual enrollment credit provided by a Top 50 global school (currently the University of Pittsburgh).

Outlier by Savvas

Outlier by Savvas features online dual-enrollment courses that allow students to earn both high school and a college credit recommendation from American Council on Education.

With the *Outlier* mastery-based approach, students earn college credit recommendations based on overall course performance. Courses feature cinematically produced lectures by leading instructors and professors from renowned institutions, including NYU, Duke, and NASA. Asynchronous access enables students to easily fit *Outlier* courses into their daily schedule.

Helping High School Students Become College Ready

With *Outlier*, high school students can earn dual credit at a pace that enables them to become college ready. Both Intro to Financial Accounting and Intro to Statistics are recommended for three Lower Division, Baccalaureate credits by American Council on Education (ACE) and cover the duration of the academic year. We recommend courses be scheduled during a student's academic day. Students can access course material through an internet connection with minimal technology requirements.

Outlier courses combine cinematic video and charismatic professors with modern, evidence-based teaching. Its diverse catalog of award-winning courses in math, science, social science, and business are taught by hand-picked instructors from top institutions. Instruction is delivered through our intuitive, user-friendly platform that makes it easy for students to focus on learning.

Outlier offers the following additional customer benefits:

- Completion and pass rates similar to on-campus national averages
- Flexible staffing and scheduling with asynchronous, year-long cohorts and no minimum or maximum enrollment
- Award-winning, cinematically produced lectures with instructors from renowned institutions, including NYU, Duke, and NASA
- Real-time visibility into student progress data
- Comprehensive student support

Outlier by Savvas Courses

Outlier offers 9 online, asynchronous, credit-worthy college courses enabling students to earn a college credit recommendation of three discipline-specific, Lower Division Baccalaureate credits. Courses span across the science, technology, engineering, and math (STEM); humanities/social sciences; and business/economics academic disciplines.

Outlier by Savvas includes the following course offerings:

- Calculus I
- College Algebra*
- Computer Science I
- Introduction to Astronomy
- Introduction to Business
- Introduction to Financial Accounting
- Introduction to Macroeconomics
- Introduction to Statistics
- Precalculus

** While all other courses are recommended for 3 credits, College Algebra is recommended for 2 credits.*

We recommend courses be scheduled during students' academic day; however, course material can be accessed at any time (via the customer learning management system) through internet connection and minimal technology requirements. *Outlier* courses are not designed to prepare students for standardized testing.

Mastery-Based Learning

Outlier courses are grounded in mastery-based learning, a pedagogical approach that emphasizes student engagement and interaction during the learning process. Mastery-based learning shifts students from the traditional role of passive recipients of information to active participants who are striving to develop their own knowledge through meaningful activities.

Outlier courses, lectures, and our learning management system are designed to promote student engagement by encouraging the active application of critical thinking and problem-solving. Our methodology prioritizes the needs and interests of students, allowing them to take ownership of their learning and make meaningful connections with course content. In addition, the *Outlier* approach encourages students to analyze and synthesize—rather than simply absorb or memorize—the material.

Students are advised to engage in reflective practices throughout their coursework: assessing their own learning progress, identifying areas for improvement, and making connections between new and prior knowledge. The mastery-based learning methodology emphasizes the importance of applying knowledge to real-world contexts to further students' understanding of the relevance and practical implications of the subject matter. Our pedagogy recognizes that students have diverse learning styles and preferences, so we provide a variety of learning tools in every course.

Courses are designed to develop students' higher-order cognitive skills, improve knowledge retention and subject matter mastery, and promote academic and skill development for employment. Continuous feedback and assessment are integral to our approach.

Digital Learning for Dual Credit

Outlier courses are 100 percent online, require an average of an hour of work per day, and can fit any school schedule. Courses were developed in-house with oversight by, and in accordance with, the academic standards and policies of the University of Pittsburgh.



Upon login to the *Outlier* learning management system (LMS), students have everything they need to earn their final grade. The platform includes pre-recorded cinematic lectures; extensive learning activities to support content mastery; assessments, quizzes, and homework assignments; and student support, including access to subject-matter experts.

The *Outlier* LMS was created by game designers in partnership with experts in pedagogy. Courses feature Hollywood-quality lecture videos and learning tools that reward engagement and immerse students in subject matter. The seamless, dark mode feel of the *Outlier* LMS allows students to think deeply and test new ideas on their way to mastering concepts.

Digital support for students includes the following features embedded in each course:

- A Course Toolkit includes all major course reference materials, including syllabus and grading formula.
- An on-demand student orientation video is embedded in the first chapter.
- An online Student Self-Service Help Center includes frequently asked questions and detailed information about how to take *Outlier* courses and how to use the *Outlier* LMS.
- Proactive, personalized email reminders tell students how they are doing and remind them of what is most important, right now, for their courses.
- Academic support includes access to subject matter experts through the *Outlier* LMS.

Learning support also includes the following pacing and time management tools:

- Students receive reminders of their next modules.
- Students can set study blocks and receive reminders via email and text marking logins during study blocks and tracking streaks.
- An automated checklist monitors course activity and progress according to the syllabus suggested pace, with alerts if students are falling behind and links to resources for getting back on track.

Additionally, every student is enrolled in a College Success course with modules on time management, why college can be beneficial, and how to think about the financial return on investment of college.

The all-encompassing digital format of *Outlier* courses provides school leaders with exceptional flexibility for scheduling and multiple course offerings. Each course is 39 weeks long and includes 35 weeks of instruction with four weeks of break time. Students should expect to spend approximately one hour on their *Outlier* course each school day, but approximately five hours of work per week can be completed at any time during the week. The structure of chapters and sections varies by course, and students have hard deadlines for assignments and exams.

Educators are provided with the tools they need to help students succeed. School leaders using *Outlier* programs have access to a dashboard with detailed student data, enabling them to monitor student activity, progress, and performance in real-time—and develop customized intervention strategies to support students to strong outcomes.

Outlier Lecturers and Tools

Lectures feature full playback functionality (pause, rewind, and replay), closed captioning, and adjustable playback so students can speed up or slow down lectures to suit their own pace. Searchable, downloadable transcripts allow students to easily review material. Additionally, students can use online or printed fill-in-the-blank lecture notes to follow along with the lecture.

Every lecturer was chosen because of their ability to bring concepts to life on-campus and on-screen, as well as their academic reputation and that of the institutions with which they are associated. The cinematic quality of *Outlier* lectures—including custom sets, warm lighting and jewel tones to draw attention to lecturers, and camera work and editing to create a seamless experience—help engage students and foster learning.

Learning Tools to Help Students Succeed

The pre-recorded lectures in *Outlier* courses are designed so that students feel like they are in a small class taught by a global expert. Within each lesson, students can explore content in the best sequence for them, making it easy for students to develop their own learning style or find additional opportunities to reinforce concepts they find more difficult.

Each chapter includes the following components to enhance student learning:

- **Guesswork.** Every chapter begins with low-stakes questions about the content, a practice known to help students learn upcoming material.

- **Active Learning Cards.** At any time, students can access multi-modal exercises tailored to the learning objectives. In addition to reinforcing learning objectives, active learning cards enable students to identify concepts where additional practice or lecture review would help them build mastery.
- **Practice Terms and Problem Sets.** Students use digital flashcards and practice problem sets to work on a given topic or concept as much as they need to on the path to mastery. Practice problem sets are structured so that students continue to practice early concepts in later chapters.

Educator Role and Experience

Throughout an *Outlier* course, each school site provides two main roles:

- **Leadership Administrators** are decision-makers supervising program implementation who ensure schools have the required infrastructure and resourcing to run *Outlier* programs.
- **Educators** are school staff who are in the room with students while they take their *Outlier* courses. Persons in this role provide direct, day-to-day student support and coaching, ideally including 1-1 weekly conversations with each student.

Educators assume the role of coach and guide, regardless of their disciplinary background, to help high school students develop college-level study skills within the familiarity of a high school setting.

We recommend that Educators review each student's real-time progress and performance with them on a weekly basis to reinforce good habits, help students identify their specific areas for improvement, and build the study skills they need to succeed at the college level.

A typical 1-1 student coaching session might include the following activities:

- Reflect on the student's experience of the course. Remind them that they are learning how to do something that is new and challenging.
- Review the student's platform activity to ensure that students are navigating to and taking advantage of all instructional resources on the platform (guesswork, lectures, active learning exercises, practice terms and problem sets, and quizzes).
- Identify activities where each student feels comfortable versus challenged, and compare each student's narrative to their trending progress and performance. Review quiz and assignment grades to identify study skills or habits that are driving positive or unstable outcomes.
- Check student progress versus recommended course pacing and identify approaches to stay on track or catch up.

The Outlier Difference

To further explain the Educator experience and role in an *Outlier* program, it is important to note two main ways in which *Outlier* differs from most online dual enrollment programs and from digital curricular resources, as described below.

First, *Outlier* does not provide—or require high school customers to provide—specific instructional personnel. Instead, instruction is available on-platform, on-demand, and programming can be managed by anyone who is licensed to serve as a state-compliant teacher of record. This individual does not need to have subject matter area expertise in the course of study in which students are participating. *Outlier* provides grading and academic support from subject matter experts through the LMS.

Second, the in-classroom Educator is not responsible for platform or academic support. *Outlier* provides support service personnel for all courses from 8:00 a.m. to 4:00 p.m. central time Monday through Friday via the student-facing platform. All support staff and contractors must comply with key regulations, including the Family Educational Rights and Privacy Act (FERPA).

Award-Winning Outlier



Outlier has been recognized with the following industry awards:

- Time 100 Best Inventions, 2020
- ASU-GSV EdTech 150, 2022 and 2023
- Time World's Top EdTech Companies, 2024
- Tech & Learning's Best Tools for Back to School, 2024

Please see the full *Outlier* catalog for Knox County Schools included with this submission.

Savvas CTE

Savvas CTE courses help middle and high school students explore career opportunities and build essential skills for success in today's high-demand, fast-growing fields. Featuring engaging content and interactive learning tools, Savvas CTE courses are designed to enhance student motivation and achievement.

Our CTE catalog spans 11 career clusters and 63 courses—such as health science, business and marketing, and a wide range of technology-related fields—including many that prepare students for industry-recognized certification exams. After successful course completion, students can graduate from high school having already earned valuable professional credential.

Skills and Industry Certification through Savvas CTE

The following figure shows Savvas CTE courses (+ denotes certification prep courses).

Savvas CTE Courses	
Architecture and Construction ▪ Architectural Design I + ▪ Architectural Design II + ▪ Architectural Design III ▪ Building Maintenance Technology I ▪ Building Maintenance Technology II + ▪ Construction: Fundamentals and Careers ▪ LEED Green Associate +	**Health Science** ▪ Career Exploration in Dentistry ▪ Career Exploration in Healthcare ▪ Dental Aide ▪ Healthcare Management and Information Systems + ▪ Health Science Foundations ▪ Introduction to Nursing
Arts, A/V Tech and Communication ▪ Adobe After Effects + ▪ Adobe Animate + ▪ Adobe Illustrator + ▪ Adobe InDesign + ▪ Adobe Photoshop + ▪ Adobe Premiere Pro +	**Information Technology** ▪ Cybersecurity ▪ Cybersecurity II ▪ Digital Information Technology ▪ Fundamentals of Blockchain and Cryptography ▪ Java SE 8 Associate + ▪ Networking + ▪ Swift App Development +
Agriculture, Food and Natural Resources ▪ Agriscience I ▪ Agriscience II	**Marketing** ▪ Meta Social Media + ▪ Social Media Business Marketing +

Savvas CTE Courses	
▪ Agriscience III	
Business Management and Administration ▪ Communication Skills for Business + ▪ Entrepreneurship and Small Business + ▪ Intuit Design for Delight ▪ Microsoft Excel + ▪ Microsoft Excel Expert + ▪ Microsoft Outlook + ▪ Microsoft PowerPoint + ▪ Microsoft Word + ▪ Microsoft Word Expert + ▪ Startups and Innovation	**STEM** ▪ Aeronautics and Space Travel ▪ Augmented and Virtual Reality Applications ▪ Cloud Technologies and the Internet of Things ▪ Introduction to Artificial Intelligence ▪ Robotics: Applications & Careers ▪ Smart Cities: Technology & Applications ▪ The History of Gaming and E-sports ▪ Wearable Technology Innovations
Finance ▪ Career Exploration in Finance ▪ Fundamentals of Bitcoin and Cryptocurrency ▪ Intuit Personal Finance + ▪ Personal Finance ▪ QuickBooks +	**Transportation, Distribution and Logistics** ▪ Drones: Remote Pilot + ▪ Transportation Technologies
Education and Training ▪ Early Childhood Education I + ▪ Early Childhood Education II + ▪ Education and Teaching Advanced ▪ Teaching as a Profession	**Multi-Cluster** ▪ Career and Financial Management ▪ Career Exploration ▪ Project Management +

Building Career Skills. Our course catalog is aligned to nationally recognized career clusters, such as STEM, health science, IT, and business and marketing. Students can prepare for industry certification exams and graduate with valuable professional credentials.

For more information, see https://www.savvas.com/solutions/career-and-technical-education.

To view the full catalog, see https://view-su2.highspot.com/viewer/198be5da9eeb10cb43c8479c4287f523

Interactive Instructional Design

The interactive instructional design of Savvas CTE courses includes the following features to enhance student learning:

- **Engaging Lesson Videos.** Each lesson begins with an instructional video from an expert educator designed to engage students in the learning objectives.
- **Interactive Reading.** The lesson video is followed by an interactive reading where students explore new material with embedded interactives like hot spots, flip cards, slides, videos, and more.
- **Integrated Activities.** Between lessons, purposefully embedded activities incorporate a variety of interactive tools for students to practice what they have learned.
- **Project-Based Learning.** End-of-module projects provide opportunities for students to apply what they have learned to real-world scenarios.
- **Real-World Preparation.** Students become career ready when they go beyond learning concepts to applying them in real life. Through practical activities, students gain the skills they need for in-demand careers.

Topics, Learning Objectives, and Concepts

Course modules include the following learning components:

- **Introduction Video and Description.** Each module begins with an introductory video where the instructor introduces the topics and learning objectives. The video is followed by a short description of module content.
- **Learning Objectives.** Each module introduction includes learning objectives for students to review prior to beginning instruction.
- **Polling Question.** Students engage with an interactive poll related to the upcoming module content. After completing the poll, students can see how their peers responded with a percentage breakdown of the results.
- **New Vocabulary.** The module introduction concludes with an interactive vocabulary matching activity, designed to familiarize students with important words and concepts they will learn.

Course Timing and Pacing

Savvas CTE courses are full-credit options that can be used to support a semester- or year-long option. On average, instruction requires 80 hours, or three to four lessons per week. Teachers can customize course components to meet specific student learning needs.

Student-Centered Design for Learning

The research-based instruction in Savvas CTE courses is designed to maximize student achievement, help students to discover their interests, and enhance their job-ready skills. Understanding by Design, growth mindset, video-based learning, problem-based learning, and project-based learning are combined to prepare students for career success.

Delivered on our award-winning Savvas Realize platform, the course engages students with relevant content, interactive exercises, readings, projects, and more. Students become career ready as they go beyond understanding concepts to applying them in real life through practical activities.

Lesson Activities, Short Answer, and Reflection

Each lesson provides learning opportunities such as engaging readings, interactive exercises, instructional videos, visuals and graphics, and animated GIFs where appropriate. Lessons are designed to provide students with a wide range of methods for learning the content. Students progress through the material at their own pace.

A variety of learning activities help students check their own understanding of the content and enable them to demonstrate mastery of specified learning objectives. Activities include multiple choice, matching, short response, and reflection exercises.

Project-Based Learning

Through project-based learning opportunities, students apply what they have learned in each module. Projects provide a variety of formats for students to demonstrate mastery of the learning objectives, including presentations, interviews, infographics, and images.

Quizzes, Midterm, and Final Exam

Modules conclude with a comprehensive quiz covering the specific learning objectives for that module. Quizzes are multiple choice and automatically graded. Using the self-assessing concept checks embedded throughout each learning module, students can check their own understanding of the content and get real-time feedback.

Through summative midterm exams, teachers can evaluate student understanding of the content covered up until that point. The midterm is intended to gauge student progress and identify areas where improvement is needed. Real-time feedback shows students how well they understand the course content.

A comprehensive final exam at the end of each course covers all the learning objectives presented in each module.

The module level quizzes, midterm exam, and final exam offer test banks with randomized question selection to ensure academic integrity.

Differentiation for Diverse Learning Needs

Designed for virtual or blended classrooms, Savvas CTE courses provide for flexibility in learning environments to accommodate different student preferences and needs. Interactive learning elements such as videos, readings, and projects engage students at different levels of understanding.

Additionally, the courses emphasize practical application through assignments such as creating infographics and written reflection, allowing students to express their knowledge in a creative manner.

Language Support and Accessibility

Savvas CTE courses include the following features for language support and student accessibility:

- **Language Translation.** Students can translate course text, including video transcripts, into more than 100 languages. Savvas CTE courses feature Speechstream, a third-party language translation tool.
- **Text-to-Speech.** Using the text-to-speech function, students can have language translations read aloud, including image alt text.
- **Closed-Captioning.** All course videos include closed captioning. Students can access video transcripts for translation into more than 100 languages.
- **Alternative Activities.** Lessons include embedded activities that meet accessibility standards and provide alternatives to the interactive exercises in multiple-choice format.

Savvas PathMaker Examples

While *Outlier* and Savvas CTE courses may be taken independently, the following figure shows examples of how Savvas PathMaker can combine dual-enrollment and CTE courses to create career pathways for students.

Savvas PathMaker Examples		
Class	**What Students Learn**	**Prepares Student to Earn**
Computer Science	▪ Networking* ▪ Java SE 8 Associate* ▪ Computer Science I #	▪ Cisco Certified Network Associate ▪ Java SE 8 Oracle Certified Associate ▪ 3 recommended college credits
Data Analytics	▪ Microsoft Excel* ▪ Communication Skills for Business* ▪ Introduction to Statistics #	▪ Microsoft Office® Specialist in Excel Certification ▪ Communication Skills for Business Certification ▪ 3 recommended college credits
Small Business Management	▪ Entrepreneurship & Small Business* ▪ QuickBooks® * ▪ Introduction to Business #	▪ Entrepreneurship & Small Business certification ▪ Intuit QuickBooks® Certified User ▪ 3 recommended college credits
Finance	▪ Career Exploration In Finance* ▪ QuickBooks®* ▪ Introduction to Financial Accounting #	▪ Intuit QuickBooks® Certified User ▪ 3 recommended college credits
* Savvas CTE certification courses # *Outlier* dual enrollment, college credits as recommended by American Council on Education (AGE)		

Preparing Students for Success. Savvas PathMaker gives students a head start on their postsecondary goals. Students graduate equipped with college course experience, credit recommendations, industry certification, and transferable skills needed to thrive in the modern workforce.

Requirement

Proposers must demonstrate an understanding of Knox County's needs and fully explain their overall approach to meet the County's requirements. This must thoroughly describe how the proposed services will meet the requirements outlined in Section 4.4. Proposer must clearly address the following:

- Describe how the program aligns with Early Postsecondary Opportunities (EPSO).

Response

Savvas PathMaker, which combines *Outlier* by Savvas dual-enrollment courses and Savvas Career and Technical Education (CTE) courses, provides students with a head start on post-high school success by equipping them with college course experience and credit recommendations, industry certification, and transferable skills while still in high school.

The alignment between Savvas PathMaker and the goals of EPSO is demonstrated in the following ways:

- **Earn Postsecondary Credit and Decrease Time/Cost**

A central function of EPSO is allowing students to earn postsecondary credits while in high school, thus decreasing the time and cost of completing a typical certificate or degree. Savvas PathMaker plans align with this EPSO goal in the following ways:

  - **College Credit:** *Outlier* dual-enrollment courses enable students to earn both high school and a college credit recommendation. Students who earn a score of 70% or higher qualify for a Lower Division Baccalaureate credit recommendation by American Council on Education (ACE).
  - **Postsecondary Alignment:** The *Outlier* courses are actual college courses. They were developed to the academic standards of the University of Pittsburgh, a top 50 institution, which ensures that students who successfully complete *Outlier* courses have a rigorous foundation in the subject(s) they study.
  - **Industry Certification:** Many of the courses included in PathMaker's Savvas CTE component prepare students for industry-recognized certification exams. After successful completion of these certification prep courses, students have the opportunity to graduate from high school having already earned valuable professional credentials, enhancing opportunities to pursue rewarding careers.

- **Prepare for Postsecondary Rigor and Success**

EPSOs ensure students are ready to succeed in education and training after high school, helping them become familiar with postsecondary rigor and expectations as well as helping them develop the confidence and skills needed after high school. Savvas PathMaker plans align with this EPSO goal in the following ways:

  - **College-Level Instruction and Expectations:** *Outlier* courses are designed for students (generally grades 11 and 12) seeking additional challenge beyond high school graduation requirements. The instruction is delivered via cinematically produced lectures by leading instructors and professors from renowned institutions, including NYU, Duke, and NASA.

- **Mastery-Based Learning:** *Outlier* courses utilize a mastery-based learning approach, which is a pedagogical method that emphasizes student engagement, interaction, and the active application of critical thinking and problem-solving. This methodology shifts students from passive recipients to active participants who take ownership of their learning.
- **Skill Development and Support:** As college courses, the *Outlier* courses are designed to develop students' higher-order cognitive skills, improve knowledge retention, and promote academic and skill development for employment. Furthermore, every student is enrolled in a College Success course with modules focused on time management and thinking about the financial return on investment of college.

  Savvas CTE courses also develop career awareness as well as industry-specific and transferable skills for students, helping them become confident in their post-secondary plans.
- **Coaching Role:** School staff serving as Educators in the *Outlier* program assume the role of coach and guide to help high school students develop college-level study skills within the familiar high school setting.

- **Making Informed Career Decisions**

EPSOs allow students to make informed postsecondary and career decisions.

- **Career Exploration and Pathways:** Savvas PathMaker offers a comprehensive catalog of Savvas CTE courses spanning 11 career clusters and 63 courses (such as health science, IT, and business). These courses help students explore career opportunities and build essential skills for today's high-demand fields.
- **Customized Experiences:** Educators can mix and match the *Outlier* dual enrollment and CTE options to create customized student learning experiences that meet the unique labor market needs of their communities and the career plans of the students. One example of a Savvas PathMaker career pathway is Computer Science, Data Analytics, Small Business Management, and Digital Marketing, each combining CTE certification courses with *Outlier* dual-enrollment college courses.

By offering both college credit opportunities through dual enrollment and professional credentials through industry certification preparation, Savvas PathMaker acts as an all-in-one digital solution that directly supports the research-backed finding that students who participate in early postsecondary courses are more likely to enroll and persist in postsecondary environments.

Requirement

- Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit.

Response

Postsecondary Credit through Outlier

Outlier offers 9 online, asynchronous, for-credit college courses enabling students to earn a Lower Division Baccalaureate credit recommendation from ACE. Courses span across the science, technology, engineering, and math (STEM); humanities/social sciences; and business/economics academic disciplines.

Outlier by Savvas includes the following course offerings:

- Calculus I
- College Algebra*
- Computer Science I
- Introduction to Astronomy
- Introduction to Business
- Introduction to Financial Accounting
- Introduction to Macroeconomics
- Introduction to Statistics
- Precalculus

** While all other courses are recommended for 3 credits, College Algebra is recommended for 2 credits.*

All students who successfully complete *Outlier* courses will develop a rigorous, foundational knowledge of the subject(s) they study. If, in addition, they wish to apply that credit toward their postsecondary goals, and they score a 70% or higher in the course, they earn a Lower Division Baccalaureate Credit Recommendation.

Skills and Industry Certification through Savvas CTE

The following figure shows Savvas CTE courses (+ denotes certification prep courses). For more information, see https://www.savvas.com/solutions/career-and-technical-education.

Savvas CTE Courses	
Architecture and Construction ▪ Architectural Design I + ▪ Architectural Design II + ▪ Architectural Design III ▪ Building Maintenance Technology I ▪ Building Maintenance Technology II + ▪ Construction: Fundamentals and Careers ▪ LEED Green Associate +	**Health Science** ▪ Career Exploration in Dentistry ▪ Career Exploration in Healthcare ▪ Dental Aide ▪ Healthcare Management and Information Systems + ▪ Health Science Foundations ▪ Introduction to Nursing
Arts, A/V Tech and Communication ▪ Adobe After Effects + ▪ Adobe Animate + ▪ Adobe Illustrator + ▪ Adobe InDesign + ▪ Adobe Photoshop + ▪ Adobe Premiere Pro +	**Information Technology** ▪ Cybersecurity ▪ Cybersecurity II ▪ Digital Information Technology ▪ Fundamentals of Blockchain and Cryptography ▪ Java SE 8 Associate + ▪ Networking + ▪ Swift App Development +
Agriculture, Food and Natural Resources ▪ Agriscience I ▪ Agriscience II ▪ Agriscience III	**Marketing** ▪ Meta Social Media + ▪ Social Media Business Marketing +
Business Management and Administration ▪ Communication Skills for Business + ▪ Entrepreneurship and Small Business + ▪ Intuit Design for Delight ▪ Microsoft Excel + ▪ Microsoft Excel Expert + ▪ Microsoft Outlook + ▪ Microsoft PowerPoint + ▪ Microsoft Word +	**STEM** ▪ Aeronautics and Space Travel ▪ Augmented and Virtual Reality Applications ▪ Cloud Technologies and the Internet of Things ▪ Introduction to Artificial Intelligence ▪ Robotics: Applications & Careers ▪ Smart Cities: Technology & Applications ▪ The History of Gaming and E-sports ▪ Wearable Technology Innovations

Savvas CTE Courses	
▪ Microsoft Word Expert + ▪ Startups and Innovation	
Finance ▪ Career Exploration in Finance ▪ Fundamentals of Bitcoin and Cryptocurrency ▪ Intuit Personal Finance + ▪ Personal Finance ▪ QuickBooks +	**Transportation, Distribution and Logistics** ▪ Drones: Remote Pilot + ▪ Transportation Technologies
Education and Training ▪ Early Childhood Education I + ▪ Early Childhood Education II + ▪ Education and Teaching Advanced ▪ Teaching as a Profession	**Multi-Cluster** ▪ Career and Financial Management ▪ Career Exploration ▪ Project Management +

Building Career Skills. Our course catalog is aligned to nationally recognized career clusters, such as STEM, health science, IT, and business and marketing. Students can prepare for industry certification exams and graduate with valuable professional credentials.

Certification Prep

Savvas CTE courses equip students with the resources necessary to prepare for several industry-based certification exams. After completing a Savvas CTE certification prep course, students gain valuable skills and are better prepared to take the applicable certification exam. With these recognized credentials, students have enhanced opportunities to pursue a rewarding career. The following figure shows certification prep courses.

Savvas CTE Certification Prep	
Course	**Certification Exam**
Adobe After Effects	Adobe Certified Professional in Visual Effects and Motion Graphics Using Adobe After Effects
Adobe Animate	Adobe Certified Professional in Multiplatform Animation Using Adobe Animate
Adobe Illustrator	Adobe Certified Professional in Graphic Design and Illustration Using Adobe Illustrator
Adobe InDesign	Adobe Certified Professional in Print and Digital Media Publication Using Adobe InDesign
Adobe Photoshop	Adobe Certified Professional in Visual Design Using Adobe Photoshop
Adobe Premiere Pro	Adobe Certified Professional in Digital Video Using Adobe Premiere Pro

Savvas CTE Certification Prep	
Course	**Certification Exam**
Architectural Design I and II	Autodesk Certified User in AutoCAD
Building Maintenance Technology II	OSHA 30 Hour Construction
Communication Skills for Business	Critical Career Skills – Professional Communication
Cybersecurity II	Cisco Certified Support Technician, Cybersecurity
Drones: Remote Pilot	FAA Part 107 Commercial Drone Pilot
Early Childhood Education I and II	Child Development Associate (CDA)
Entrepreneurship and Small Business	Entrepreneurship and Small Business (ESB)
Healthcare Management Information Systems	Certified Associate in Healthcare Management and Information Systems
Intuit Design for Delight	Intuit Design for Delight Innovator
Intuit Personal Finance	Intuit Personal Finance
Java SE 8 Associate	Oracle Certified Associate in Java Information Technology Specialist in Java
LEED Green Associate	LEED Green Certified Associate
Meta Social Media	Meta Certified Digital Marketing Associate
Microsoft Excel / Outlook / PowerPoint / Word	Microsoft Office Specialist/Associate
Microsoft Excel Expert	Microsoft Office Specialist: Excel Expert
Microsoft Word Expert	Microsoft Word Specialist: Word Expert
Networking	Cisco Certified Network Associate (CCNA)
Project Management	Certified Associate in Project Management Project Management Ready
Social Media Business Marketing	CIW Social Media Strategist
Swift App Development	App Development with Swift Associate
QuickBooks	Intuit QuickBooks Certified User Online

Enhanced Career Opportunities. After completing a Savvas CTE certification prep course, students gain valuable skills and are better prepared to take the applicable industry certification exam.

Requirement

- Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills.

Response

Outlier: Discipline-Specific Skills

Outlier courses are grounded in mastery-based learning, a pedagogical approach that emphasizes student engagement and interaction during the learning process. Mastery-based learning shifts students from the traditional role of passive recipients of information to active participants who are striving to develop their own knowledge through meaningful activities.

Projects and assignments are tailored to specific course content. Mathematics courses and Intro to Astronomy include practice problems focused on modeling real-world phenomena, social sciences courses include case studies, Intro to Business has a capstone business plan project, and Computer Science I has a capstone programming project.

Outlier courses, lectures, and our learning management system are designed to promote student engagement by encouraging the active application of critical thinking, inquiry, reasoning, and problem-solving. Our methodology prioritizes the needs and interests of students, allowing them to take ownership of their learning and make meaningful connections with course content. In addition, the *Outlier* approach encourages students to analyze and synthesize—rather than simply absorb or memorize—the material.

Students are advised to engage in reflective practices throughout their coursework: assessing their own learning progress, identifying areas for improvement, and making connections between new and prior knowledge. The mastery-based learning methodology emphasizes the importance of applying knowledge to real-world contexts to further students' understanding of the relevance and practical implications of the subject matter. Our pedagogy recognizes that students have diverse learning styles and preferences, so we provide a variety of learning tools in every course.

Courses are designed to develop students' communication and higher-order cognitive skills, improve knowledge retention and subject matter mastery, and promote academic and skill development for employment. Continuous feedback and assessment are integral to our approach.

Savvas CTE: Discipline-Specific Skills

Savvas CTE courses address discipline-specific critical thinking, inquiry, reasoning, and communication skills through their instructional design features, practical activities, project-based learning, and comprehensive assessment structure.

Savvas CTE courses are designed to move students beyond simple concept recall toward practical application and higher-order thinking. Courses incorporate problem-based and project-based learning to prepare students for career success. Purposefully embedded integrated activities use a variety of interactive tools for students to practice what they have learned, fostering discipline-specific critical thinking skills.

Module projects and culminating projects enhance learning with real-world problems, situations, tasks, and challenges, requiring students to use their newly learned discipline-specific knowledge as well as skills in critical thinking, questioning, reasoning, and communication.

Communication skills are addressed through the completion of discipline-specific projects, which can include presentations, interviews, infographics, and images, as well as through discussion-based reflections and written assessments.

Requirement

- Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered.

Response

Career and Technical Education is the focus area of learning for Savvas CTE. Courses incorporate employability and technical skill development, and many provide students with exposure to industry-recognized credentials. The curriculum supports both college and career readiness through project-based learning, certification preparation, and real-world applications.

Savvas recommends 9 *Outlier* courses, listed by content area, for Knox County Schools:

Knox County Schools Recommendations		
Mathematics	**Social Sciences**	**Sciences**
▪ Calculus I ▪ College Algebra ▪ Intro to Statistics ▪ Precalculus	▪ Intro to Business ▪ Intro to Financial Accounting ▪ Intro to Macroeconomics	▪ Computer Science I ▪ Intro to Astronomy

Requirement

- Describe the courses that are offered individually as well as those that are offered as a full diploma package.

Response

All *Outlier* and Savvas CTE courses are offered individually.

Requirement

- Outline the assessment process(es) and opportunities to earn college/university credit.

Response

Outlier: Assessment

Courses include the following components for student assessment (specifics vary by subject):

- **Assignments.** Depending on the course, graded assignments include problem sets, projects, or written assignments. The *Outlier* platform provides scoring and grading for all required assignments.
- **Quizzes.** Students can take quizzes multiple times and only the highest score is recorded. This makes quizzes the heart of mastery-based learning on *Outlier*. Students can use quizzes to assess their mastery of a segment of the course, identify topics for further study, review and practice those topics, then quiz again to demonstrate mastery or improve their grades.
- **Exams.** Most courses have six exams. The last two are taken together and the final exam is cumulative. Exams typically cover one to four chapters of material and are auto graded on the *Outlier* platform.
- **Study Guides.** Prior to taking exams, students can access a study guide that outlines the exam length and format as well as concepts and key terms that will be tested. Study tips, additional practice problems, and study prompts are provided for some courses.

Students who score a 70% (C-) or higher in their *Outlier* course qualify for a credit recommendation from American Council on Education. Full details on credit recommendations by course are available via links to the Outlier by Savvas Listings in the ACE National Guide in the attached course catalog.

Students who wish to pursue transfer credit are encouraged to review course learning outcomes and detailed topics of study with an advisor at the institution to which they hope to transfer credit. Upon completion of the course, students can apply for Lower Division Baccalaureate transfer credit by sharing their their score in the course, along with their course syllabus and the ACE National Guide listing for that course with an advisor at their college or university. Any questions about credit review and recommendation processes can be directed to the ACE National Guide Help Center: https://acenationalguide.zendesk.com/hc/en-us.

Savvas CTE: Assessment:

Savvas CTE courses include comprehensive assessments designed to engage students in higher order thinking skills and present questions that show a variety of low, moderate, and high cognitive complexity. Question formats include short answer responses, multiple choice, matching, projects, and reflection exercises,

Assessments provide flexibility for students in demonstrating mastery of content. Select assessments offer student choice, presenting students with alternative activity formats that meet a variety of academic needs.

Formative and Summative Assessments

The following figure shows assessment options available in a typical Savvas CTE course:

Assessment Type	Description
Concept Check	Using the self-assess concept checks embedded throughout each learning module, students can monitor their own understanding of the content and get real-time feedback.
Discussion-Based Reflection	Thought-provoking discussion prompts invite students to share what they have learned with their peers. Students engage with relevant content through online discussion boards or by working in an individual course journal.
Short Answer Assignments	Short answer assignments at the end of each module give students opportunities to apply their learning to real-world situations. Students are provided with a detailed assignment rubric showing clear expectations for their work.
Module Quizzes	Each module concludes with an auto-scored quiz to assess student understanding. Results are delivered to the teacher's gradebook in the district learning management system.
Mid-Term	The midterm is intended to gauge student progress and identify areas where improvement is needed. Real-time feedback shows students how well they understand the course content.
Final Exam	A comprehensive final exam covers all the learning objectives presented in each module. Results are delivered to the teacher's gradebook in the district learning management system.

Assessing Student Learning. Savvas CTE courses include comprehensive assessments designed to engage students in higher-order thinking skills. Assessments provide flexibility for students in demonstrating their proficiency.

In addition to gaining valuable skills, many Savvas CTE courses equip students with the resources necessary to prepare for industry-based certification exams. With these recognized credentials, students have enhanced opportunities to pursue a rewarding career.

Requirement

- Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.

Response

A foundational part of Savvas Pathmaker is our Career Exploration course, which is designed to help middle school students identify their interests, strengths, and potential career pathways before entering high school. Through interactive assessments, reflective activities, and exposure to a wide range of CTE fields, students gain early insight into their aptitudes and passions. This process empowers all learners—including those from underserved populations—to make informed decisions about high school coursework and to confidently pursue advanced CTE, dual enrollment, and other academic opportunities aligned with their goals. The Career Exploration course is fully developed and ready for implementation, serving as an early bridge between career awareness and high school pathway enrollment.

Requirement

- Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program. Detail the professional development models available and teacher support materials associated with the program.

Response

Please see the Professional Learning section of this response for details on our professional development offerings.

Outlier: School Support through the Partner Dashboard

The *Outlier* Partner Dashboard for school leaders provides access to real-time student progress data, enabling educators to monitor student activity, progress, and understanding and adapt intervention strategies. The Partner Dashboard enables school staff to complete the following tasks:

- Access course materials and syllabi
- View course schedules and milestones
- View and download student progress and grade reports
- Unlock exams and submit academic integrity violation reports
- Access support for teachers and students
- Unlock exams and submit academic integrity violation reports

For additional detail, please refer to the Educator Role and Experience section above.

Savvas CTE: School Support through Teacher Resources

Teacher resources were developed to help instructors support student learning while successfully implementing the course in a variety of learning environments. Resources include the course syllabus, instructor guide, and digital courseware access. Additionally, an on-demand self-paced teacher training course covers implementation of *Adobe Photoshop*.

Progress Monitoring

Through student participation scoring, teachers can monitor student interaction with the content, which enables them to make informed decisions about student performance and to effectively determine student needs. For students with low participation scores, teachers can see which lessons or assessments students are struggling with the most. Teachers can then redirect students or provide additional support.

On-Demand Training Course

Teachers participate in an asynchronous online course to review the basic structure and components of the course for implementation with students.

Blended Learning Guide

The blended learning guide provides teachers with a step-by-step solution for course implementation in a traditional classroom environment. To assist with classroom management and planning, teachers are provided with recommendations for small group work, whole class instruction, and class discussion prompts.

Answer Key, Rubric, and Pacing Guide

For assistance with grading, teachers use answer keys, assessment rubrics, and sample student responses. The course pacing guide helps teachers allocate their time to successfully support their students in completing the content within a specified time frame (semester or year-long).

Requirement

- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

Response

Outlier offers popular online, asynchronous dual-enrollment courses that enable students to earn high school credit and college credit recommendations from the comfort of their school while Savvas CTE students gain valuable job skills needed for today's high-interest, high-paying jobs.

KCS educators have the flexibility to combine *Outlier* dual-enrollment courses and Savvas CTE courses to create a high-quality, digital-forward solutions that is accessible to all students.

By combining innovative technology with decades of educational research, the Savvas PathMaker portfolio delivers immersive learning experiences tailored to every learner's needs, empowering them with the outcomes they deserve.

Note: for additional detail on training, please see sections on Professional Learning and Delivery of Services.

Outlier: Course Content and Samples

Outlier by Savvas offers Knox County Schools 9 online dual-enrollment courses that allow students to earn both high school credit and college credit recommendations.

Sample Syllabi

On the following pages, you will find two syllabi for courses offered by *Outlier:* **Introduction to Statistics** and **Introduction to Financial Accounting**.

Video Trailers

Please see video trailers for the sample courses at the following links:

- Introduction to Statistics: https://player.vimeo.com/video/1010983769
- Introduction to Financial Accounting: https://player.vimeo.com/video/1012068181

Virtual Demos

- Outlier Student Learning Experience: https://app.getreprise.com/launch/AX5K2r6/
- Outlier Teacher Experience: https://app.getreprise.com/launch/x64J1kX/

Chapter 1 Previews

Please see course previews for the sample courses at the following links:

- Introduction to Statistics: https://preview.statistics.firstedition.outlier.org/#/
- Introduction to Financial Accounting: https://preview.financialaccounting.firstedition.outlier.org/#/

Should more comprehensive samples be required for review, full course login credentials can be made available.

Savvas CTE: Course Content and Samples

Savvas CTE offers Knox County Schools a catalog of 63 courses spanning 11 career clusters, such as health science, business and marketing, and a wide range of technology-related fields—including many that prepare students for industry-recognized certification exams.

Savvas works in collaboration with authors, educators, and developers to apply research-based principles to both product and user experience design. Our CTE courses are developed and designed using foundational research in the following key areas:

- Best Practices for Reading Complex Text
- Best Practices for Content Mastery and Long-term Understanding
- Best Practices for Academic Conversations

Below you will find detailed information, including course descriptions, learning modules, and learning objectives for two examples of Savvas CTE courses: **Cybersecurity II** and **Transportation Technologies.**

Cybersecurity II

Protecting Societal Assets in a Digital World

Organizations around the globe—from businesses and governments to schools and hospitals—rely on cybersecurity as an essential component of their operations. The *Cybersecurity II* course provides a comprehensive overview of key concepts and practices in cybersecurity.

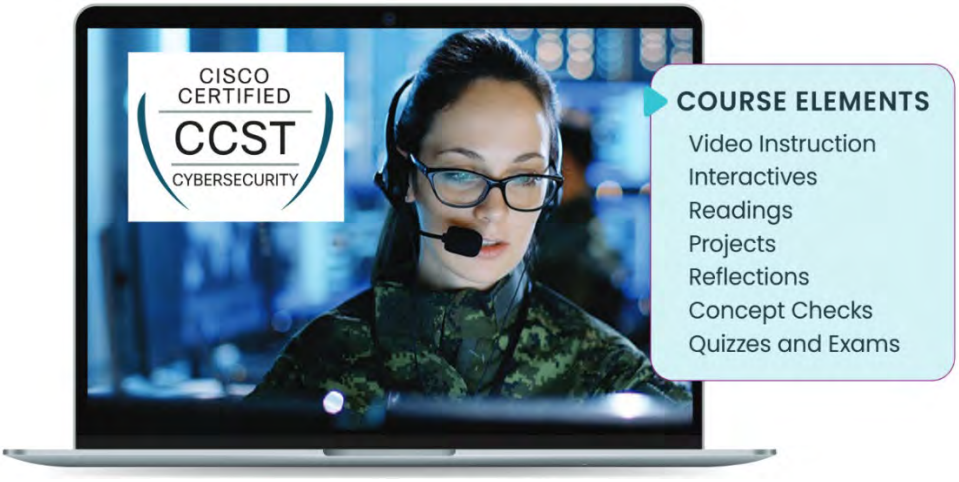


Students learn skills in identifying and preventing common threats and vulnerabilities, including malware, ransomware, and social engineering attacks.

Topics also include encryption methods; network security, with a focus on securing wireless networks; implementing firewalls; virtual private networks (VPNs); endpoint security; vulnerability management; and risk assessment. Additionally, students gain practical experience in responding to cybersecurity incidents using business continuity processes, disaster recovery plans, and digital forensics methods.

Certification Preparation

Instruction is designed to prepare students for the Cisco Certified Support Technician cybersecurity exam. Students are provided with the resources they need to excel on the exam and earn valuable career credentials.



Interactive Learning. The *Cybersecurity II* course provides interactive learning through videos, discussion boards, projects, and more. Students learn to identify common threats and vulnerabilities, including malware, ransomware, and social engineering attacks.

Engaging Learning Modules

As shown in the following figure, *Cybersecurity II* includes eight modules. Students learn basics such as what cybersecurity is, the different types of attacks, and how cybercriminals work, to more complex concepts of measures to mitigate against digital attacks, including intrusion detection and prevention systems.

Lessons begin with an instructional video from an expert educator designed to engage students in the learning objectives. The video is followed by an interactive reading where students explore new material through embedded activities such as hot spots, flip cards, slides, videos, and more. New vocabulary is introduced through interactive matching activities designed to familiarize students with important words and concepts they will learn.

Students progress through modules by completing lessons, activities, projects, and quizzes. End-of-module projects provide students with opportunities to apply what they have learned to real-world scenarios.

Cybersecurity II	
Module	**Overview and Learning Objectives**
Module 1: Essential Security Principles	Students learn essential security principles, focusing on key concepts such as vulnerabilities, threats, exploits, and risks. Additionally, students explore attack vectors; hardening techniques; the concept of defense in depth; and the importance of confidentiality, integrity, and availability (CIA) in cybersecurity. Instruction covers different types of attackers, their motives for launching attacks, and the importance of adhering to a code of ethics in security practices. Students also learn to identify and explain common threats and vulnerabilities, including malware, ransomware, denial of service attacks, botnets, and social engineering tactics such as tailgating, phishing, vishing, and smishing. Other topics include physical attacks, man-in-the-middle attacks, Internet of Things vulnerabilities, insider threats, and Advanced Persistent Threats.
Module 2: Access Management Principles	Students explore key access management principles, including authentication, authorization, and accounting (AAA) and technologies such as RADIUS and multifactor authentication (MFA). Additional topics include encryption methods and their applications, including different types of encryption, hashing, certificates, and public key infrastructure (PKI). Students examine the differences between strong and weak encryption algorithms; the appropriate use of encryption based on the state of data, whether in transit, at rest, or in use; and the protocols that rely on encryption for securing data.
Module 3 Basic Network Security Concepts	In this module, students examine TCP/IP protocol vulnerabilities, including weaknesses in protocols such as TCP, UDP, HTTP, ARP, ICMP, DHCP, and DNS. The impact of network addresses on security will also be discussed, focusing on the differences between IPv4 and IPv6 addresses, MAC addresses, network segmentation, CIDR notation, NAT, and the distinction between public and private networks. Additionally, students learn about various network infrastructure components and technologies, such as network security architecture, DMZ, virtualization, cloud environments, honeypots, proxy servers, intrusion detection systems, and intrusion prevention systems. Topics also include setting up a secure wireless small office/home office network, employing MAC address filtering, encryption standards, and SSID configuration. Students explore secure access technologies such as access control lists, firewalls, virtual private networks), and network access control.
Module 4 Endpoint Security Concepts Part I	Students explore operating system security concepts across Windows, macOS, and Linux, focusing on key security features such as Windows Defender, host-based firewalls, command-line interfaces like CLI and PowerShell, file and directory permissions, and privilege escalation. Additionally, students learn how to verify that endpoint systems meet security policies and standards, covering areas such as hardware and software inventory, program deployment, data backups, regulatory compliance (PCI DSS, HIPAA, GDPR), and Bring Your Own Device (BYOD) management, including data encryption, app distribution, and configuration management.

Cybersecurity II	
Module	**Overview and Learning Objectives**
Module 5: Endpoint Security Concepts Part II	Students learn to implement both software and hardware updates, focusing on tools such as Windows Update, application updates, device drivers, firmware updates, and patching. Additionally, students develop skills in interpreting system logs, including using tools like Event Viewer, audit logs, system and application logs, and syslog, while learning to identify anomalies. Instruction also covers malware removal processes, including scanning systems, reviewing scan logs, and performing malware remediation.
Module 6: Vulnerability Assessment and Risk Management Part I	Instruction covers vulnerability management, focusing on identifying, managing, and mitigating vulnerabilities. Students learn about active and passive reconnaissance methods, including techniques such as port scanning and automation for vulnerability testing. The module also covers the use of threat intelligence techniques to identify potential network vulnerabilities, examining the uses and limitations of vulnerability databases and industry-standard tools. Students assess vulnerabilities and make recommendations based on reports, policies, and resources like Common Vulnerabilities and Exposures (CVEs), cybersecurity reports, and news. Topics include ad hoc and automated threat intelligence; proactive updating of documentation and communication before, during, and after cybersecurity incidents; and secure sharing and updating of documentation.
Module 7: Vulnerability Assessment and Risk Management Part II	Students explore the principles of risk management, focusing on the distinction between vulnerabilities and risks, methods for ranking risks, and various approaches to managing and mitigating them. Instruction covers different levels of risk (low, medium, high, extremely high) and the specific risks associated with different types of data and data classifications. The module also covers security assessments of IT systems, including information security, change management, computer operations, and information assurance. Additionally, students examine key components of disaster recovery plans (DRP) and business continuity plans (BCP), including backup strategies and disaster recovery controls such as detective, preventive, and corrective measures.
Module 8: Incident Handling	Students learn how to monitor security events and recognize when escalation is necessary; explore the roles of SIEM and SOAR systems in monitoring network data to identify security incidents, such as packet captures and log file entries; and learn how to identify suspicious activities in real time. The module also covers digital forensics and attack attribution processes, including frameworks like the Cyber Kill Chain, MITRE ATT&CK Matrix, and Diamond Model. Students learn about Tactics, Techniques, and Procedures (TTP), the handling of digital evidence, and maintaining the chain of custody. Additionally, the impact of compliance frameworks such as GDPR, HIPAA, PCI-DSS, FERPA, and FISMA on incident handling is discussed, focusing on reporting and notification requirements. Students learn about cybersecurity incident response, including policy, planning, procedures, and the incident response lifecycle.

Developing Essential Skills. The *Cybersecurity II* course provides students with a foundational understanding of protecting networks, systems, and programs from digital attacks. Additionally, students explore the wide range of career opportunities in cybersecurity.

For more information, please see https://www.savvas.com/solutions/career-and-technical-education/career-clusters/digital-technology/cybersecurity-ii

Transportation Technologies

New and Innovative Transportation Ideas

Transportation Technologies introduces students to new and innovative transportation ideas—some of which are already in use, while others may be decades away from ever happening.



Students who successfully complete the course will understand the history of transportation development, evaluate ten futuristic transportation technologies, and explore career paths in emerging transportation fields.

The program covers the following existing and emerging transportation modes:

- Driverless cars
- Drones
- Flying cars
- Interstellar space travel
- Jetpacks
- Rockets
- Submarines
- Supersonic jets

Modules

As shown in the following figure, *Transportation Technologies* includes 12 modules. Lessons begin with an instructional video from an expert educator designed to engage students in the learning objectives. The video is followed by an interactive reading where students explore new material through embedded activities such as hot spots, flip cards, slides, videos, and more. New vocabulary is introduced through interactive matching activities designed to familiarize students with important words and concepts they will learn.

Students progress through modules by completing lessons, activities, projects, and quizzes. End-of-module projects provide students with opportunities to apply what they have learned to real-world scenarios.

Transportation Technologies	
Module	**Overview and Learning Objectives**
Module 1: Introduction to the Future of Transportation	Students review the history of transportation, how key inventions led to momentous changes in society, and our current problems with infrastructure and transportation systems. Instruction covers new and merging transportation technologies like flying cars, hyperloop, and driverless cars.

Transportation Technologies	
Module	**Overview and Learning Objectives**
Module 2: Flying Cars	Instruction covers Vertical Takeoff and Landing (VTOL) vehicles, the history of flying cars, current flying car projects, the pros and cons of such vehicles, and careers in the field of VTOL technology.
Module 3: Driverless Car Technology	Students examine how sensors in cars see an object and respond accordingly, as well as how fleets of driverless cars learn from each other through a process called machine learning. Instruction also covers what the future might hold for students considering a career in the transportation.
Module 4: Driverless Cars in Society	Students examine both sides of the issue—the need for driverless vehicles, problems and drawbacks of human operators, and the pros and cons of driverless cars. Topics include benefits and risks of driverless cars, including safety, cybersecurity, mobility, cities, and jobs. Students examine social dilemmas and privacy issues associated with self-driving cars in society.
Module 5: Drones	Instruction explains what drones are and how they are different from other aircraft, including how drones fly, are controlled, and operate autonomously. Students examine the impact drones have on jobs today and future jobs involving drones as well as current uses for drones and their safety.
Module 6: Hyperloop	Students learn about the proposed Hyperloop and vactrain concept. Instruction explains what a vactrain is and the physics behind it, whether the concept of Hyperloop is actually practical given costs and the current state of technology, and the risks associated with such a system. After covering the technology and hurdles behind the system, instruction explores the current state of Hyperloop development and what the future holds as well as careers and opportunities in the vactrain sector.
Module 7: Jetpacks	Instruction covers what a jetpack is and how it differs from other forms of technology, technological advances that have contributed to the emergence of jetpacks, and historical creations and modern jetpacks and how they operate. Students discuss the risks and limitations associated with jetpacks, examine whether or not jetpacks can be used as a regular means of transportation, and study an existing company that develops jetpacks.
Module 8: Supersonic Jets	Instruction covers supersonic travel technology, how supersonic jets differ from traditional jet liners, and the sonic boom phenomenon. Students examine the technology, costs, operations, and demise of the Concorde; the pros and cons of supersonic jets in general; and whether or not it is realistic to expect supersonic intercontinental flights. The module concludes with a look at companies developing supersonic jets as well as career opportunities in the aerospace industry.
Module 9: Personal Rapid Transit	Instruction defines and explains personal rapid transit (PRT) and related terms. Students discuss similarities and differences between PRT systems and existing modes of transportation. The module also covers personal transporters and how they might fit into the world of transportation. Finally, students look at how crossing a motorcycle with a car could, potentially, offer a solution to many transportation issues.

Transportation Technologies	
Module	**Overview and Learning Objectives**
Module 10: Supercaviation	Students examine some of the futuristic transportation ideas in sea travel. The focus of the module is the concept of supercavitation, a technology that has been around for decades but has been sparsely used and has some serious challenges. Students learn how scientists are working on the challenges, which may lead to a resurgence in the use of this unique technology. Students also review other marine transportation modes that incorporate ideas such as autonomous control and clean energy.
Module 11: Space Travel	Students discuss the history of space exploration, the benefits, and associated costs; define words and terms related to rockets and space travel; and examine reusable rockets, how they would benefit the space industry, and challenges involved in creating one. Students also discuss companies that are developing commercial space travel and explore careers in the space travel industry.
Module 12: Interstellar Travel	Instruction covers the challenges to interstellar travel; explains need-to-know terms such as astronomical units, light speed, propulsion, and g-force; and covers theories and the pros and cons of each theory in achieving interstellar travel. Students discuss the feasibility of an interstellar mission and when, if ever, interstellar travel will be launched.

Transportation in a Changing World. *Transportation Technologies* introduces students to new and innovative transportation ideas. Students explore emerging technologies, their pros and cons, and potential career paths.

For more information, see https://www.savvas.com/transportation-technologies.

Outlier by Savvas Intro to Financial Accounting

Course Summary

Credit Type: Course
ACE ID: OTLR-0006
Version: 1
Organization: **Outlier by Savvas**
Location: Online
Length: Approximately 140 hours of work to complete
Minimum Passing Score: 70
ACE Credit Recommendation Period: 8/1/2025 - 7/31/2028

Credit Recommendation & Competencies

Level	Credits (SH)	Subject
Lower-Division Baccalaureate	3	Introduction to Accounting

Credit is recommended for students who achieve a C- (70%) or higher. If this course has been taken for a University of Pittsburgh transcript, it can be located in the University of Pittsburgh - Johnstown catalog as ACCT 0100.

Description

Objective:

The course objective is to provide students with an introduction to the discipline of accounting. Topics covered include financial statements; analyzing and recording transactions; the adjustment process; completing the accounting cycle; merchandising transactions; fraud, internal controls, and cash; accounting for receivables; inventory; long-term assets; current and long-term liabilities; and statement of cash flows.

Learning Outcomes:

- Identify the steps and sequence of the accounting cycle.
- Calculate inventories and cost of goods sold.
- Analyze and prepare financial statements in accordance with recognized standards.

- Distinguish between current and long-term liabilities.
- Understand and compare internal controls and how they facilitate ethical accounting practices.
- Define tangible and intangible assets.
- Apply various accounting ratios to assess the financial health of a business.
- Demonstrate an understanding of basic financial accounting principles.

General Topics:

- Importance & Users of Accounting
- Accounting Activities & Career Paths
- Financial Statements and their Relationships
- The Accounting Equation
- Initial Steps of the Accounting Cycle
- Impact of Business Transactions on Financial Statements
- Preparing a Trial Balance with Journal Entries & T-Accounts
- Concepts & Guidelines Affecting Adjusting Entries
- The Adjustment Process and Common Types of Adjusting Entries
- Recording & Posting Common Types of Adjusting Entries
- Ledger Balances & Preparing an Adjusted Trial Balance
- Preparing Financial Statements Using the Adjusted Trial Balance
- Closing Entries & Post-Closing Trial Balance
- The Current Ratio & Working Capital Balance
- Comprehensive Accounting Cycle
- Merchandising vs. Service Activities & Transactions
- Perpetual vs. Periodic Inventory System
- Merchandise Purchases & Sales
- Freight-In Methods
- Accounting Fraud, Internal Controls, and Management Responsibilities
- Bank Reconciliation & Associated Journal Entries
- Fraud in Financial Statements & SOX Requirements
- Revenue Recognition Principle
- Uncollectable Accounts
- Receivables Management Using Financial Ratios
- Notes Receivable & Accounts Receivable
- Basic Inventory Valuation Methods & Cost Flow Assumptions
- Cost of Goods Sold & Ending Inventory: Periodic Method
- Inventory Valuation Errors, Inventory Management Using Financial Ratios
- Tangible & Intangible Assets, Capitalized Costs vs. Expenses
- Depreciation Methods to Allocate Capitalized Costs
- Intangible Assets & Recording Related Transactions
- Special Issues in Accounting for Long-Term Assets
- Current Liabilities
- Analyzing, Journalizing, and Reporting Current Liabilities
- Accounting Treatment for Contingent Liabilities

- Journal Entries for Short-Term Notes Payable
- Pricing of Long-Term Liabilities
- Amortization of Long-Term Liabilities: Straight Line Method
- Purpose of and preparing the Statement of Cash Flows: Indirect & Direct Methods
- Statement of Cash Flows and Ratios to Assess Liquidity & Solvency

Instruction & Assessment

Instructional Strategies:

- Audio Visual Materials
- Case Studies
- Computer Based Training
- Lectures
- Practical Exercises

Methods of Assessment:

- Examinations
- Quizzes

Outlier by Savvas Intro to Statistics

Course Summary

Credit Type: Course
ACE ID: OTLR-0003
Version: 2
Organization: **Outlier by Savvas**
Location: Online
Length: Approximately 140 hours of work to complete
Minimum Passing Score: 70
ACE Credit Recommendation Period: 8/1/2025 - 7/31/2028

Credit Recommendation & Competencies

Level	Credits (SH)	Subject
Lower-Division Baccalaureate	3	Elementary Statistics

Credit is recommended for students who achieve a C- (70%) or higher. If this course has been taken for a University of Pittsburgh transcript, it can be located in the University of Pittsburgh - Johnstown catalog as STAT 0202.

Description

Objective:

The course objective is to teach foundational descriptive and inferential statistical procedures. Topics covered include descriptive statistics; probability; discrete and continuous random variables; the normal distribution; the central limit theorem; confidence intervals; hypothesis testing with one and two samples; categorical data analysis; the chi-square distribution; linear regression; correlation; f-distribution; and one-way ANOVA. Students will be introduced to statistical tools including Desmos and R.

Learning Outcomes:

- Understand, analyze, and criticize quantitative arguments using principles of statistics.
- Solve basic statistical problems using R.
- Explain basic concepts of statistics and probability.

General Topics:

- The Statistical Process
- Data and Sampling
- Experimental Design

- Visualizing Data
- Histograms and Scatterplots
- Measures of Center
- Measures of Spread
- Measures of Location
- Intro to Probability
- Probability Rules
- Contingency Tables
- Working with Discrete Random Variables
- Binomial Distribution
- Continuous Random Variables
- Calculating with Continuous Random Variables
- The Normal Distribution
- Law of Large Numbers
- Central Limit Theorem for Means and Sums
- Confidence Intervals with the Normal Distribution
- Confidence Intervals with the T-Distribution
- Confidence Intervals for Population Proportions
- Into to Hypothesis Testing
- Conducting Hypothesis Tests
- Paired Samples
- Independent Samples
- Intro to the Chi-Square Distribution
- Test of Independence
- Goodness-of-Fit Test
- Tests for Homogeneity
- Correlation Coefficients
- Correlation and Linear Equations
- The Regression Equation
- ANOVA
- The F-Distribution

Instruction & Assessment

Instructional Strategies:

- Audio Visual Materials
- Coaching/Mentoring
- Computer Based Training
- Lectures
- Practical Exercises

Methods of Assessment:

- Examinations
- Quizzes

Professional Learning

Requirement

- Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program. Detail the professional development models available and teacher support materials associated with the program.

Response

Savvas professional development services include comprehensive staff training sessions, ranging from product activation to systemwide training and job-embedded services focused on content, pedagogy, technology, and data use.

Working with Knox County Schools, we will develop and implement a customized professional development plan. Our services are available in a variety of formats, including onsite and virtual workshops, videos, built-in support in our programs, and print-based reference materials.

Savvas education consultants and curriculum specialists have domain expertise and experience supported by years of teaching and delivering professional development services. Upon adoption, we will partner with Knox County Schools to develop an implementation plan that best aligns with the district's timeline and goals for professional development and student outcomes. The Savvas account manager for Knox County Schools can provide scheduling information for our professional development sessions.

Requirement

- Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;

Response

Whether you want to empower your students to explore potential careers, prepare for college, or become certified professionals, it's easy to do it all with Savvas PathMaker. Simply mix and match dual enrollment courses and CTE courses from our comprehensive catalog to create personalized pathways for every student. Savvas supports every step of a student's math journey. Our evidence-based, standards-aligned math programs help all students develop deep conceptual understanding, procedural skills, and fluency. Students can take their mathematical skills beyond the core classroom with Savvas PathMaker. For students needing advanced coursework and career electives, these college and career readiness

courses empower students to graduate with confidence by earning college credits, industry certifications, and the skills needed to thrive in the modern workplace.

Training and Ongoing Support for Savvas CTE

Our support is anchored with virtual platform activations on mySavvasTraining.com to introduce educators to the CTE platform and provide exploration of the resources, technology, and instructional design. We deliver high-quality training direct from our expert content and training teams. With flexible delivery options to meet your needs and schedule, this service provides you with timely and convenient access to a wide range of product and platform training solutions.

You can count on Savvas to provide effective solutions that deliver results. Our services include the following:

mySavvasTraining.com (included with purchase) Teachers, coaches, and administrators will have 24/7 access to online training and professional learning resources and support documents through www.mySavvasTraining.com.

- **On-Demand Tutorials**. Our online resources offer concise product training developed by educational experts with teaching, instructional design, and product backgrounds. “Educators can use our online, asynchronous training materials at their own pace and as needed to supplement learning from onsite and live virtual trainings, and to further their understanding of Savvas programs and platforms.
- **Guides and Resources**. User guides, training guides, implementation ideas, back-to-school tips, and end-of-year procedures are available to educators.
- **Transcript**. The transcript feature tracks user progress and provides certificates of completion when online tutorials and training sessions are complete. Certificates include the tutorial or session name, duration, and completion date. For accountability, each educator’s learning path in the on-demand tutorials is tracked on individualized transcripts.

Asynchronous Program Activation, Program Activation Follow-up Session, and Customer Journey Support will be available Summer 2025 for Savvas CTE.

Training and Ongoing Support for Outlier by Savvas

Savvas offers implementation support for *Outlier by Savvas*, our dual enrollment program which includes math and science electives for students in grades 9-12.

- **Administrator Toolkit:** Introduce staff, students, and families to *Outlier by Savvas* and help them select courses prior to school start
- **On-Demand Training / Platform Orientation:** Asynchronous virtual on-demand onboarding and training for students, leadership administrators, and facilitators

- **Personalize Email Reminders:** Robust lifecycle messaging to encourage students, provide progress updates, and help them prioritize tasks. Robust lifecycle messaging for school staff specifically targeting onboarding training and deadline reminders, and weekly emails throughout the course as a reminder of what's most important, right now, for their courses.
- **Proactive Support:** Includes discussion communities for students and outreach to school staff from a customer success relationship manager
- **Reactive Support:** Students and school staff have access to *Outlier* LMS help request.
- **Academic Support:** In the discussion communities, subject matter experts are available through the *Outlier* LMS.
- **Lesson Plans:** Facilitators and Leadership Administrators have access to suggested lessons plans they can use during the most pivotal moments of an *Outlier* course and help them use class time most effectively. Each lesson plan includes learning outcomes and essential questions, recommended facilitator and student resources, and an outline of 45 minutes of learning activities, starting with an anticipatory set and closing with an exit ticket and homework (if applicable). Lesson plans cover topics such as:
  - Orienting students prior to beginning their *Outlier* course
  - Completing student registration
  - Exam and quiz administration
  - Assignment review
  - Guiding exam preparation
  - Post-exam review sessions
- **Online Help Center:** The student self-service Help Center with FAQs and detailed information about how to take *Outlier* courses and use the *Outlier* LMS. Facilitator and leadership administrator self-service Help Center with FAQs and detailed information for everything from the start of the onboarding and implementation process through managing courses. Includes step-by-step instructions for all tools and processes and detailed explanation of policies and responsibilities.

Requirement

- Training and/or professional learning offerings about the services and supports included in the program; and

Response

Please see above response.

Tab IV: Delivery of Services

Requirement

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule.

- Courses/curricular frameworks for multiple content areas;

Response

Please see the Implementation Plan included with this response.

Requirement

Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines;

Response

Assessments: Outlier

Courses include the following components for student assessment (specifics vary by subject):

- **Assignments.** Depending on the course, graded assignments include problem sets, projects, or written assignments. The *Outlier* platform provides scoring and grading for all required assignments.
- **Quizzes.** Students can take quizzes multiple times and only the highest score is recorded. This makes quizzes the heart of mastery-based learning on *Outlier*. Students can use quizzes to assess their mastery of a segment of the course, identify topics for further study, review and practice those topics, then quiz again to demonstrate mastery or improve their grades.
- **Exams.** Most courses have six exams. The last two are taken together and the final exam is cumulative. Exams typically cover one to four chapters of material and are auto graded on the *Outlier* platform.
- **Study Guides.** Prior to taking exams, students can access a study guide that outlines the exam length and format as well as concepts and key terms that will be tested. Study tips, additional practice problems, and study prompts are provided for some courses.

Students who score a 70% (C-) or higher in their *Outlier* course qualify for a credit recommendation from American Council on Education. Full details on credit recommendations by course are available via links to the Outlier by Savvas Listings in the ACE National Guide in the attached course catalog.

Students who wish to pursue transfer credit are encouraged to review course learning outcomes and detailed topics of study with an advisor at the institution to which they hope to transfer credit. Upon completion of the course, students can apply for Lower Division Baccalaureate transfer credit by sharing their score in the course, along with their course syllabus and the ACE National Guide listing for that course with an advisor at their college or university. Any questions about credit review and recommendation processes can be directed to the ACE National Guide Help Center: https://acenationalguide.zendesk.com/hc/en-us.

Requirement

- Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;

Response

Please see the Professional Learning section of this response.

Requirement

- Training and/or professional learning offerings about the services and supports included in the program; and

Response

Please see the Professional Learning section of this response.

Requirement

Supports for student content and skill development beginning minimally in the 9th grade.

Response

Outlier: Student Support Resources

Digital support for students includes the following features embedded in each course:

- A Course Toolkit includes all major course reference materials, including syllabus and grading formula.
- An on-demand student orientation video is embedded in the first chapter.
- An online Student Self-Service Help Center includes frequently asked questions and detailed information about how to take *Outlier* courses and how to use the *Outlier* LMS.
- Proactive, personalized email reminders tell students how they are doing and remind them of what is most important, right now, for their courses.
- Academic support includes access to subject matter experts through the *Outlier* LMS.

Learning support also includes the following pacing and time management tools:

- Students receive reminders of their next modules.
- Students can set study blocks and receive reminders via email and text marking logins during study blocks and tracking streaks.
- An automated checklist monitors course activity and progress according to the syllabus suggested pace, with alerts if students are falling behind and links to resources for getting back on track.

Additionally, every student is enrolled in a College Success course with modules on time management, the benefits of college, and the financial return on investment of college.

Each chapter includes the following components to enhance student learning:

- **Guesswork.** Every chapter begins with low-stakes questions about the content, a practice known to help students learn upcoming material.
- **Active Learning Cards.** At any time, students can access multi-modal exercises tailored to the learning objectives. In addition to reinforcing learning objectives, active learning cards enable students to identify concepts where additional practice or lecture review would help them build mastery.
- **Practice Terms and Problem Sets.** Students use digital flashcards and practice problem sets to work on a given topic or concept as much as they need to on the path to mastery. Practice problem sets are structured so that students continue to practice early concepts in later chapters.

Savvas CTE: Student Support Resources

Savvas works in collaboration with authors, educators, and developers to apply research-based principles to both product and user experience design. Our CTE courses are developed and designed using foundational research in the following key areas:

- Best Practices for Reading Complex Text
- Best Practices for Content Mastery and Long-term Understanding
- Best Practices for Academic Conversations

Program materials also include the following learning aids for students who need audio support and reading support:

- Read-aloud content
- Module quizzes
- Lesson summary videos
- Review summaries for each topic

Additionally, module introductions include summaries of the key content and vocabulary in the module. A number of program features have also been designed to help students achieve content mastery and long-term understanding, including module objectives, the lesson learning model, reflection exercises, and blended learning guides.

Requirement

Proposers do not have to provide complete curriculum. Samples are sufficient.

Response

Please see the following links for more information, including course overviews and virtual samples:

- *Outlier* overview: https://www.savvas.com/solutions/dual-enrollment
- *Outlier* virtual sample: https://www.savvas.com/solutions/dual-enrollment/data/pages/virtual-sampling
- Savvas CTE overview: https://www.savvas.com/solutions/career-and-technical-education
- Savvas CTE virtual sample: https://www.savvas.com/solutions/career-and-technical-education/data/pages/virtual-samples

Implementation Plan

Requirement

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule.

- Courses/curricular frameworks for multiple content areas;

Response

CTE Support Plan

Training and Ongoing Support for Savvas CTE

Our support is anchored with mySavvasTraining.com to introduce educators to the CTE platform and provide exploration of the resources, technology, and instructional design. We deliver high-quality training directly from our expert content and training teams. With flexible delivery options to meet your needs and schedule, this service provides you with timely and convenient access to a wide range of product and platform training solutions.

You can count on Savvas to provide effective solutions that deliver results. Our services include the following:

- **mySavvasTraining.com** (included with purchase). Teachers, coaches, and administrators will have 24/7 access to online training and professional learning resources and support documents through www.mySavvasTraining.com.
- **On-Demand Tutorials**. Our online resources offer concise product training developed by educational experts with teaching, instructional design, and product backgrounds. Educators can use our online, asynchronous training materials at their own pace and as needed to supplement learning from onsite and live virtual trainings, and to further their understanding of Savvas programs and platforms.
- **Guides and Resources**. User guides, training guides, implementation ideas, back-to-school tips, and end-of-year procedures are available to educators.

- **Transcript**. The transcript feature tracks user progress and provides certificates of completion when online tutorials and training sessions are complete. Certificates include the tutorial or session name, duration, and completion date. For accountability, each educator's learning path in the on-demand tutorials is tracked on individualized transcripts.

Implementation Support Plan

With a qualifying purchase, Knox County will have access to a Customer Success Manager. The CSM will work with district leaders to create an Implementation Support Plan to meet your goals and initiatives. For your review, we are providing a sample implementation support plan.

Timeline	Audience	Implementation Support
Upon adoption	▪ District and school leaders	**Implementation Planning Call**
On-Demand **Self-Paced**	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**mySavvasTraining.com**
BTS	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**Asynchronous Program Activation**
30 days	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**Program Activation Follow-up session**

Outlier Support Plan

Training and Ongoing Support for Outlier by Savvas

Savvas offers implementation support for *Outlier by Savvas*, our dual enrollment program which includes math and science electives for students in grades 9-12.

- **Administrator Toolkit:** Introduce staff, students, and families to *Outlier by Savvas* and help them select courses prior to school start
- **On-Demand Training / Platform Orientation:** Asynchronous virtual on-demand onboarding and training for students, leadership administrators, and facilitators
- **Personalized Email Reminders:** Robust lifecycle messaging to encourage students, provide progress updates, and help them prioritize tasks. Robust lifecycle messaging for school staff specifically targeting onboarding training and deadline reminders, and weekly emails throughout the course as a reminder of what's most important, right now, for their courses.
- **Proactive Support:** Includes discussion communities for students and outreach to school staff from a Customer Success relationship manager
- **Academic Support:** Subject matter experts are available through the *Outlier* LMS.
- **Lesson Plans:** Facilitators and Leadership Administrators have access to suggested lessons plans they can use during the most pivotal moments of an *Outlier* course and help them use class time most effectively. Each lesson plan includes learning outcomes and essential questions, recommended facilitator and student resources, and an outline of 45 minutes of learning activities, starting with an anticipatory set and closing with an exit ticket and homework (if applicable). Lesson plans cover topics such as:
    - Orienting students prior to beginning their *Outlier* course
    - Completing student registration
    - Exam and quiz administration
    - Assignment review
    - Guiding exam preparation
    - Post-exam review sessions
- Online Help Center: The student self-service Help Center with FAQs and detailed information about how to take Outlier courses and use the Outlier LMS. Facilitator and leadership administrator self-service Help Center with FAQs and detailed information for everything from the start of the onboarding and implementation process through managing courses. Includes step-by-step instructions for all tools and processes and detailed explanation of policies and responsibilities.

Implementation Support Plan

With a qualifying purchase, Knox County will have access to a Customer Success Manager. The CSM will work with district leadership to create an Implementation Support Plan to meet your goals and initiatives. For your review, we are providing a sample implementation support plan below.

Timeline	Audience	Implementation Support
Upon adoption	▪ District and school leaders	**Implementation Call** **Topics include but are not limited to:** ▪ Set goals and expectations ▪ Customer onboarding steps including rostering options o Auto Rostering Discovery Call with I&R team o Manual Rostering: Instructions given via implementation call with follow up ▪ "Getting Set Up" Course outlines the following requirements: o Selecting students / pretests o Selecting Educators o Selecting Course Start Date o Technical Requirements o Where to go for Questions ▪ Determine Start Date ▪ Educator Enrolled into the Realize platform ▪ Students are enrolled
BTS	▪ Leadership	**Leadership Administrator Training** ▪ Email sent confirming rostering/integration is complete ▪ Complete final training ▪ Outline next steps
On-Demand **Self-Paced**	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**mySavvasTraining.com**
BTS	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**Initial Training**

First 30 days	▪ Administrators	**Administrator Usage Check-in** Review the following metrics: ▪ Students enrolled/registered plus activity ▪ Teachers logging in and checking student progress
Weekly	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**Engagement Emails** Progress emails on student data include but are not limited to: ▪ Log-in activity ▪ Weekly progress data ▪ Educator Partner Dashboard Log-in Data
Mid-Year	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**MOY Check-in – Topics could include, but not limited to** ▪ Review of original expectations and goal alignment ▪ Trending Data
End of Year	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**End-of-Year Check-in / Summary** Topics to review ▪ Current grades ▪ How we aligned with expectations ▪ Transcript information

Tab V: Experience and References

Requirement

Proposers are to detail the Company's experience relating to the services requested in this RFP, specifically:

- Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s).

Response

Company Information

Savvas Learning Company LLC became a fully independent company in spring 2019 following a sale of the Pearson Education Learning Services business unit to Nexus Capital Management. We employ more than 1,900 people nationwide, with offices in the Chicago and Phoenix metro areas and headquarters in Paramus, New Jersey.

Our headquarters is located at 15 East Midland Avenue, Suite 502, Paramus, NJ. The office phone number is 201.928.7770.

Savvas is built upon more than 120 years of innovation and leadership in K–12 education. With pioneering brands such as Scott Foresman, Prentice Hall, and Pearson in our history, we have reimagined how generations of students learn. Our award-winning programs, developed by leading authors and educators, are based on adaptive learning practices and advanced technology to deliver interactive, personalized content across all grade levels and disciplines.

We provide comprehensive, flexible education solutions purposefully developed for blended learning environments. Through project-based, real-world learning experiences, we help students discover their full learning potential.

School districts turn to Savvas to empower educators and engage students with research-based, classroom-tested programs designed to move learning forward:

- **Approximately 40 million students** in more than 13,000 school districts across all 50 states, the District of Columbia, Puerto Rico, and globally in more than 125 countries use our core curricula, supplemental content, intervention programs, and assessment tools.
- **Savvas Realize**, our award-winning online platform that provides digital delivery for our programs, offers teachers and students access to all content and resources in one place.

Personalized learning experiences engage students, and teachers can customize content and use assessment data to monitor student progress and adjust instruction.

- Our new **Savvas PathMaker** solution combines award-winning Outlier by Savvas dual-enrollment courses with our interactive Savvas CTE courses for an all-in-one digital solution. Our college and career readiness portfolio helps prepare students for their future after high school, whether that involves entering the workforce, college, or both.
- Our **professional development services**, available in onsite, virtual, or blended formats, help educators advance their own learning and improve classroom practices. Our expert team members provide program and technical support to assist school districts with large-scale implementations and content-specific services.

Requirement

- Proposers must describe the organization's experience with similar projects.

Response

A Track Record of Success

Savvas has successfully implemented many sizable and complex implementations and professional learning engagements throughout the US and fully expects to offer the same level of quality to Knox County Schools.

Serving School Districts Nationwide

Savvas has worked with districts and schools of all sizes nationwide to increase learning and achievement among diverse student populations:

- Arlington, VA
- Baltimore City, MD
- Chicago, IL
- Cleveland, OH
- DeKalb County, GA
- East Orange, NJ
- Houston, TX
- Kansas City, MO
- New York City
- Oklahoma City, OK
- Philadelphia, PA
- Pittsburgh, PA
- Pueblo, CO
- San Antonio, TX
- Savannah, GA
- Stamford, CT
- Tulsa, OK
- Wichita, KS

Savvas is a responsible and financially sound leader in the US K–12 education marketplace. We are confident that within our submission, Knox County Schools will recognize our stability and strength. As a privately held company, our financial details, including lists of entities to which we have previously provided services similar to this RFP, are proprietary and not shared with third parties in the ordinary course of business.

Requirement

- Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP. Information about each person listed should include their a) title b) resume, including advanced education credentials, relevant work experience, demonstrated outcomes, independent research, and publishing in the subject areas addressed by this RFP, as applicable c) number of years with the organization and d) description of the type of work the individual will perform

Response

Proposed Project Team for Knox County

The following Savvas team members are proposed for assignment to Knox County:

- Melissa Bruner, Account Executive
- Tricia Seely, Account Manager
- Stephanie Garcia, Customer Success Manager
- Scott Campell, Customer Success Manager

Note About Named Staff

In some cases, including situations beyond our control, a named staff member may be unavailable at the time of program implementation. In such cases, we will provide another team member with comparable experience and qualifications to fill the position described.

Melissa Bruner

Relevant Professional Experience

Savvas Learning Company

Account Executive (2025–Present)

- Identifies and collaborates with decision-makers to deliver impactful solutions that significantly boost student achievement and foster academic success
- Develops multi-year business plans incorporating customer needs and funding criteria to support organizational goals; supports customers as their programs grow and change
- Partners with internal teams including government relations, customer service, and marketing to provide insights into product management development and alignment
- Nationwide (K–12) consultant for teachers and administrators

Cengage/ed2go, OK

Account Manager (2022–2025)

- Achieved Honors Club 2024–2025
- Managed relationships with 80 US and Canadian post-secondary academic, community, and business partners to provide workforce upskilling
- Led partners to obtain grants and third-party funding, effectively promote their programs, and support them in exceeding their goals

Burlington English, OK

Customer Success Manager

- During COVID, trained and supported teachers to use technology tools and company platform to support adult learners in mastery of English for careers
- Team accomplished +25% growth in 2020 and 2021
- Monitored customer usage data, health indicators, and growth opportunities, translating them into strategies for success
- Developed onboarding and customer success strategies to maximize customer value and success

BrainPOP

Account Executive (2016–2020)

- 3 Top Performer awards in 2019: customer retention, growth, goal achievement

Pearson Connections

Regional Manager, Online and Blended Learning (2012–2016)

- Top Performer Club
- Consulted with district administrators and school leadership to craft online/blended learning solutions from transactional sales through long-cycle sales

Blackwell Book Services

Regional Sales Manager (2007–2009)

Cengage

National Accounts Manager, Custom Editor (2005–2007)

Pearson

Higher Ed Sales, Career/Technology, Distance Learning (1994–2005)

Education

- MA, English, Miami University
- BA, English, University of Oklahoma

Tricia Marie Seely

Relevant Professional Experience

Savvas Learning Company

Account Manager Level II (2024–2025)

- Consults and builds relationships with current potential customers
- Develops and reviews courses for internal professional development
- Utilizes advanced presentation skills to craft and deliver cost-effective educational solutions and to train teachers on program utilization
- Trains administrators and teachers using Balanced Leadership to inspire participants in a cultural manner to apply academic language techniques on a daily basis for all students
- Maintains knowledge of Department of Education politics, policies, and ed-tech trends, including critical systems such as SSO, SIS, LMS, and assessment data

Houghton Mifflin Harcourt, K–12, TN

Account Executive Level II / Outside Sales (2010–2024)

- Exceeded sales quotas through consultative approaches and relationship building with expertise in managing both current accounts and prospecting for new opportunities
- Crafted cost-effective educational solutions and trained teachers on program utilization
- Trained administrators and teachers through classroom observations and workshops

Cambium Learning / Voyager Learning / Sopris West

Account Executive (2004–2010)

- Delivered tailored interventions, supplemental resources, and professional development solutions for the educational needs of the lower 30% of students, ensuring they received dedicated support and resources
- Collaborated with various teams, offering crucial market insights, ensuring the company's solutions aligned with the evolving demands
- Used assessment data to plan and conduct professional development/mentoring

Education

- BA, Communications, Public Relations, University of West Florida, Pensacola, FL

Stephanie Garcia

Relevant Professional Experience

Savvas Learning Company

Customer Success Manager (2023–Present)

- Manages Outlier's high school partnership portfolio from onboarding to renewal, with a specific focus on driving product feedback to refine the high school marketing offering
- Supports integration of Outlier's dual enrollment product into the Savvas CTE portfolio; iterates the customer journey to support scaling the volume 10x for AY 2025–26
- Develops and implements targeted strategies to drive product adoption and enhance student engagement; ensures partners fully leverage the value of the Outlier platform

Climb Credit, New York, NY

Senior Partner Success Manager (2022–2023)

- Managed the lifecycle of a school portfolio including onboarding, contract changes, and ongoing account management
- Utilized client performance data and key user metrics to build narratives and identify product-identified creative solutions to growing their success
- Mentored and trained two account managers; encouraged growth opportunities

Partner Support Analyst and Success Associate (2020–2022)

- Designed and implemented Climb's first School Help Center, including website and content creation; led successful implementation on school portal platform and school onboarding journey
- Restructured internal partner onboarding process to streamline onboarding experience
- Overhauled system for processing operational tickets working with student success and operations team to ensure the process was successfully adopted across the company

Education

- BA, International Relations Concentration, Business and Economics, Boston University

Savvas Product Certifications

- *Outlier*
- Pilot Training and Support

Scott Campbell

Relevant Professional Experience

Savvas Learning Company

Customer Success Manager (2022–Present)

- Trains and coaches teachers and administrators in a variety of tools and resources to help increase student achievement

Edm8ker

Director of US Operations

- Trained thousands of heads of state, district/school leaders, and teachers in 30+ countries
- Managed all aspects of Intel's Skills for Innovation Platform
- Developed and refined curriculum in all subject areas to ensure educators are able to infuse technology into their classroom instruction

Educational Management and Consulting

Self-Employed Educational Management and Consulting

- Trained and provided educational coaching to thousands of educators in a variety of instructional tools and resources as well as best practices in education
- Provided school improvement services for several government agencies
- Developed curriculum for a variety of schools and organizations

Central Pennsylvania School Districts

Principal and Classroom Teacher

- Instructional leader at three Central Pennsylvania School Districts
- Worked in urban, suburban and rural areas
- Experience in all areas of K–12 education

Education

- MEd, Educational Leadership, Shippensburg University
- BS, Elementary Education, Lock Haven University

Professional Certifications

- District Superintendent, (K–12) Life
- Principal (K–12) Life
- Elementary (K–8) Life

Savvas Product Certifications

- *Savvas CTE*
- *elevateScience* K–5, 6–8
- *enVision* K–5, 6–8, AlGlA
- *SuccessMaker*
- *Experience Science*
- *Physical Science*

Professional Affiliations

- NASSP, National Association of Secondary School Principals
- PSBA, Pennsylvania School Boards Association

Presentations

- BETT 2022, London UK, *Teaching for the Future with Skills for Innovation*

Areas of Expertise

- K–5/Elementary, 6–8/Middle School, 9–12/Secondary
- Adult Education, Instructional Coaching
- Classroom Teaching, School Administration
- English Language Learners
- CRL/Social and Emotional Learning

Requirement

- References (Attachment B)

Response

Please see Attachment B on the following pages.

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: Savvas Learning Company LLC

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: Brooklyn North High Schools, New York City Public Schools
Contact Person: Ainsley Rudolfo, Executive Director Phone Number: 718-455-4635
Email Address: arudolfo@schools.nyc.gov Fax Number:
Nature of Contract: Course delivery
Services Provided: All Outlier courses
Dollar amount: $ Proprietary (over life of contract)
Contract start date: January 2023 Contract end date: Ongoing

Name of Firm: St. Augustine Preparatory Academy, Milwaukee WI
Contact Person: Jack Wallace, Principal Phone Number:
Email Address: jwallace@augprep.org Fax Number:
Nature of Contract: Course delivery
Services Provided: Various Outlier courses
Dollar amount: $ Proprietary (over life of contract)
Contract start date: June 2022 Contract end date: Ongoing

Name of Firm: Indiana Online
Contact Person: Laura Garmire Phone Number: 317.759.5558
Email Address: lgarmire@indianaonline.org Fax Number:
Nature of Contract: Course delivery
Services Provided: Various CTE courses
Dollar amount: $ Proprietary (over life of contract)
Contract start date: Contract end date: Ongoing

Tab VI: Proposed Costs

Requirement

Costs proposals must include all direct and indirect costs associated with the performance of the service. Proposed costs should be inclusive of all expenses. Proposer may include the methodology used to determine their proposed cost. Pricing must include all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. There will be no reimbursement for any such charges.

Per Attachment A, please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- Annual Candidacy/Membership Fees
- School Application Fees
- Annual Program or Curriculum Fees
- Curricular Materials
- Exam Fees
- Professional Development (inclusive of materials and travel expenses, as applicable)
  - On-Site Format
  - Webinar/Virtual Format
- Other Expenses
- Optional Features/Add-Ons

Response

See our Proposed Costs proposal provided under separate cover, as instructed by this RFP.

Proposed Costs

SAVVAS
LEARNING COMPANY



© Savvas Learning Company LLC

CALCULUS I

The mathematics of change.



Learners can choose from 3 world-class instructors to find the teaching style that best suits them. Using real-world examples from science to sports to human happiness, this painless(ish) course will help learners master calculus.

Learners can practice skills with unlimited question sets, quizzes, and a gorgeous active -learning-based digital textbook.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas Calculus I

COLLEGE ALGEBRA

Math rules everything around us.



Whether students just need a refresher, or as a prerequisite for what's next, this groundbreaking course offers a whole new interactive, science-backed method to teach age-old mathematical concepts.

At Outlier, we know math can be scary, so we've designed a course that works for "not math people" and mathletes alike. This course breaks concepts down into simple building blocks that are easy for students to understand.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas College Algebra

COMPUTER SCIENCE I

Code the future.



This groundbreaking course teaches essential programming skills in Java through projects that resonate with everyone: a Sudoku puzzle-solver and a survival game with an array of dangerous characters.

Plus, students develop practical skills for in-demand tech careers—such as testing and debugging code, error handling, and defensive programming.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas Computer Science I

INTRO TO ASTRONOMY

Our universe, explored.



We are all made of star stuff. And in Intro to Astronomy, students discover just how that stuff wound up creating the universe around us. Filled with jaw-dropping views of the cosmos, this course explores everything from the Big Bang to the fate of the universe—and every microcosm of space in between.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas Intro to Astronomy

INTRO TO BUSINESS

The art of creating value.



Welcome to a new kind of business course. Learners go beyond the jargon to gain essential business skills and fluency. From landing that job, to fundraising, management, marketing, and more, this course provides critical tools for modern business, and even a basic business plan.

Dr. Jim Mourey shows learners that business isn't just about making money. It's about how to change the world.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas Intro to Business

INTRO TO FINANCIAL ACCOUNTING

Find the story in numbers.



Outlier's Intro to Financial Accounting is unlike any numbers-based course. Students will use true crime tales to decode accounting practices that lie at the heart of every business, and learn powerful financial tools to see the story and balance the books on their own.

Watch Trailer

Chapter 1 Preview: Click to experience I ACE National Guide Listing: Outlier by Savvas Intro to Financial Accounting

INTRO TO MACROECONOMICS

How money moves our world.



In this course, students discover how the laws of supply and demand play out IRL, explore the relationship between national economies and the global financial system, and even make sense of the US dollar. Outlier's 4 accomplished instructors use real-world experience and timely examples to illuminate how money makes the world go round.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas Intro to Macroeconomics

INTRO TO STATISTICS

How data describes our world.



This course is a critical thinking class designed to help learners see order in chaos.

Our 4 renowned instructors guide learners through building a statistical toolkit and show how statistics are used to make inferences in a variety of real-world situations.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas Intro to Statistics

PRECALCULUS

Master the building blocks of Calculus.



This course is the perfect gateway to math's more advanced realms.

Outlier's passionate instructors will take learners on a riveting ride that creates a mastery of math's building blocks and a profound new appreciation for an age-old discipline.

Watch Trailer

Chapter 1 Preview: Click to experience | ACE National Guide Listing: Outlier by Savvas Precalculus



© Savvas Learning Company LLC

Savvas Learning Company LLC
Clarifications and Exceptions

Savvas Learning Company LLC (Savvas) submits the following clarifications and/or exceptions to the Knox County Schools (TN) (District) Request for Proposal #3688 for Advanced Academics Program (RFP). Savvas is happy to discuss these items, as well as any other potential agreement terms, in connection with any proposed award of a contract to Savvas pursuant to the RFP.

General clarifications and exceptions

Savvas' response is subject to these clarifications and exceptions, any terms applicable to the offered products, and any variations from RFP specifications in its response.

Specific clarifications and exceptions

Section I - Proposal Preparation and Submission

Page 3, Section 1.22, Signing of Proposals: Savvas has signed the proposal document and is amenable to that serving as acceptance of the terms and conditions included in the RFP, subject to these clarifications and exceptions, applicable product terms, and RFP specification variations. Savvas will work with the District in good faith to develop a mutually agreeable contract.

Page 3, Section 1.27, Vendor Default: Savvas will look to correct any defective or nonconforming work as quickly as practicable and would anticipate a 30-day cure period. Savvas will not be responsible for the purchase of substitute products or services.

Section II - Obligations, Rights and Remedies

Page 4, Section 2.3, Assignment: Savvas reserves the right to assign any resulting contract in connection with a merger, acquisition, or sale of all or substantially all of Savvas' assets. As such transactions are inherently confidential, Savvas would be unable to notify the District in advance. Should such an event occur during the life of any resulting agreement, Savvas will notify the District as soon as reasonably practicable and will ensure that the terms of any agreement are binding on any successor.

Page 4, Section 2.8, Default: Savvas does not object to the District having a right to terminate the contract for default, provided, however, that such right should also be available to Savvas, and that each party should be afforded a 30-day cure period.

Page 4, Section 2.10, Incorporation; also, Page 5, Section 2.18, Order of Precedence: As stated above, Savvas is willing to negotiate a mutually acceptable contract, including documents to be incorporated and the priority of such documents. If the final contract includes multiple documents or attachments, the order of precedence will be determined by the mutual agreement of the parties as part of final contract negotiations. Savvas objects to the District's RFP governing Savvas' response as that might lead to confusion regarding provisions in the RFP to which Savvas objected or indicated that it would not meet.

Page 4, Section 2.11, Indemnification-Hold Harmless: Savvas accepts this indemnification provision subject to receiving prompt, written notice of any claim and being afforded the opportunity to defend such claim at its own expense.

Page 5, Section 2.15, Limitations of Liability: Savvas requests that any limitation of liability provision be made mutual, and suggests that, except for liability resulting from the indemnification obligation or an infringement by the District of Savvas' intellectual property rights, either party's maximum aggregate liability for direct and proven damages shall not exceed the fees received under a resulting contract in the

twelve-month period preceding the date of the claim and that neither party be liable for any indirect and/or consequential damages. Savvas is happy to discuss further in the event of an award.

Page 5, Section 2.19, Remedies: District remedies are limited to actual documented damages and are subject to the limitation of liability set forth in Savvas' response above to Section 2.15.

Page 6, Section 2.23, Termination: Savvas agrees that the District may terminate any resulting contract for breach but requests a 30-day cure period.

Page 6, Section 2.24, Warranty: Savvas warrants that the services provided shall be performed by qualified personnel in a good and skillful manner consistent with industry standards and disclaims all other warranties.

Section III - Special Terms and Conditions

Page 8, Section 3.18, Insurance: Savvas maintains a comprehensive insurance program and can generally meet the listed requirements; however, there may be certain technical aspects of the insurance clause that require discussion in the event of an award. See further responses to Attachment B, Insurance Checklist, below.

Page 9, Section 3.29, Price: Savvas will guarantee pricing for the first three years. Pricing may be modified after the three-year guarantee for subsequent renewals. Savvas will not commit to seeking approval or providing documentation regarding the rationale for any price increases.

Attachment C (Insurance Checklist)

#22: Savvas' policies provide for automatic blanket additional insured endorsement where required by contract but do not specifically name third parties; therefore, a separate endorsement will not be provided.

Additionally, in the interest of time and expense, Savvas has not submitted Attachment C to its insurer for signature; however, Savvas' authorized signatory has completed the form and confirms that Savvas' insurance program meets the District's needs with the above exceptions.

****

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

We have included a completed Attachment A in our separately submitted cost proposal.

Annual Candidacy/ Membership Fees	$_____per school Notes:
Application Fees	$_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes:
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students:
Exam Fees	$_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site • Webinar/Virtual
Other Expenses:	
Optional Features/Add-ons:	

CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
04/02/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Aon Risk Services Northeast, Inc.
New York NY Office
One Liberty Plaza
165 Broadway, Suite 3201
New York NY 10006 USA

CONTACT NAME:
PHONE (A/C. No. Ext): (866) 283-7122 **FAX (A/C. No.):** (800) 363-0105
E-MAIL ADDRESS:

INSURER(S) AFFORDING COVERAGE		NAIC #
INSURER A:	Trumbull Insurance Company	27120
INSURER B:	Hartford Fire Insurance Co.	19682
INSURER C:	Hartford Casualty Insurance Co	29424
INSURER D:	Sentinel Insurance Company, Ltd	11000
INSURER E:		
INSURER F:		

INSURED
Savvas Learning Company LLC
15 E Midland Avenue Suite 502
Paramus NJ 07652 USA

COVERAGES **CERTIFICATE NUMBER:** 570111946697 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
B	X **COMMERCIAL GENERAL LIABILITY** CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY X PRO-JECT X LOC OTHER:			10UUNBA4DKV	03/29/2025	03/29/2026	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$1,000,000 $1,000,000 $10,000 $1,000,000 $2,000,000 $2,000,000
A	**AUTOMOBILE LIABILITY** X ANY AUTO OWNED AUTOS ONLY HIRED AUTOS ONLY SCHEDULED AUTOS NON-OWNED AUTOS ONLY			10UENBM4HXG Any Auto	03/29/2025	03/29/2026	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$1,000,000
C	X **UMBRELLA LIAB** X OCCUR **EXCESS LIAB** CLAIMS-MADE DED X RETENTION $10,000			10XHUBB9US0	03/29/2025	03/29/2026	EACH OCCURRENCE AGGREGATE	$5,000,000 $5,000,000
D	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? **(Mandatory in NH)** If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N: N	N / A	10WBAC8HB8	03/29/2025	03/29/2026	X PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE-EA EMPLOYEE E.L. DISEASE-POLICY LIMIT	 $1,000,000 $1,000,000 $1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
RE: Proposal Number: 2973. Knox County Procurement Division is included as Additional Insured in accordance with the policy provisions of the General Liability, Automobile Liability and Umbrella Liability policies.

CERTIFICATE HOLDER

Knox County Procurement Division
1000 North Central Street, Suite 100
Knoxville TN 37917 USA

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Aon Risk Services Northeast, Inc.

Holder Identifier :

Certificate No : 570111946697

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AGENCY CUSTOMER ID: 570000079202

LOC #:

ADDITIONAL REMARKS SCHEDULE

AGENCY		NAMED INSURED
Aon Risk Services Northeast, Inc.		Savvas Learning Company LLC
POLICY NUMBER		
See Certificate Number: 570111946697		
CARRIER	NAIC CODE	EFFECTIVE DATE:
See Certificate Number: 570111946697		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: ACORD 25 **FORM TITLE:** Certificate of Liability Insurance

Additional WC Carriers:

Sentinel Insurance Company Ltd. AL CA CT DE DC FL KS ME MD MO OK WI
Twin City Fire Insurance Company AZ CO IN IO KY MA MN NE NH NJ NM OR PA TN UT WY
Hartford Fire Insurance Company GA NY SD VT WV
Hartford Underwriters Insurance Company HI
Hartford Casualty Insurance Company ID
Hartford Accident and Indemnity Insurance Company IL
Property & Casualty Insurance Company of Hartford LA SC
Trumbull Insurance Company AR MI MS NV RI TX VA
Hartford Insurance Company of the Midwest NC

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ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, Pamela McNair, VP of Proposals, president or other principal

Officer of Savvas Learning Company LLC, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

Pamela McNair EdD
President or Principal Officer

For: Savvas Learning Company LLC
Name of Company

STATE OF TENNESSEE} State of Illinois,
COUNTY OF } County of Cook

Subscribed and sworn before me by Pamela McNair,

President or principal officer of Savvas Learning Company, LLC,

On this 6th day of October 2025.

David W Kading Jr
Notary Public

My Commission expires: 1/24/2029

OFFICIAL SEAL
DAVID W KADING JR
Notary Public, State of Illinois
Commission No. 1003269
My Commission Expires January 24, 2029

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature:
X Pamela McAi EdD
(sign in blue ink)

Title: Vice President of Proposals Date: 10/6/2025

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature:
X Pamela McAi EdD
(sign in blue ink)

Title: Vice President of Proposals Date: 10/6/2025

EXHIBIT A
GENERAL FEDERAL FUNDING REQUIREMENTS
KNOX COUNTY PROCUREMENT DIVISION
REQUEST FOR PROPOSAL NUMBER 3688

Equal Employment Opportunity

Savvas acknowledges and agrees to these requirements.

During the performance of this contract, the contractor agrees as follows:
(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:
Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying,'' in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

Imagination **Engaged**

Every student has the potential to change the world. It starts with students feeling a strong sense of belonging within a learning community that values their experiences, sets high expectations, and makes content meaningful and accessible. With our award-winning curriculum, teachers can create this community and engage all students in rigorous content that is characterized by inquiry, collaboration, and personalization.



Visit **Savvas.com/Insights** for free resources designed to inspire educators and keep them informed about the latest trends in next-generation learning.

Scan the code to learn more about **Savvas Learning Company**.

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Savvas.com

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Knox County Procurement Division

Advanced Academic Programs
RFP 3688

PRICING PROPOSAL

Due - October 14, 2025, 2:00 PM

Knox County Procurement Division
Attention: Jay Garrison, Procurement Coordinator
1000 North Central Street, Suite 100
Knoxville, Tennessee 37917

Tab VI: Proposed Costs

Requirement

Costs proposals must include all direct and indirect costs associated with the performance of the service. Proposed costs should be inclusive of all expenses. Proposer may include the methodology used to determine their proposed cost. Pricing must include all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. There will be no reimbursement for any such charges.

Per Attachment A, please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- Annual Candidacy/Membership Fees
- School Application Fees
- Annual Program or Curriculum Fees
- Curricular Materials
- Exam Fees
- Professional Development (inclusive of materials and travel expenses, as applicable)
  - On-Site Format
  - Webinar/Virtual Format
- Other Expenses
- Optional Features/Add-Ons

Response

Please see the following Proposed Costs as outlined in Attachment A, featuring our Savvas product and professional development pricing.

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$0_____per school Notes:
Application Fees	$0_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: All Outlier courses_____ Program Fees: $_____ Curriculum Fees: $ 225 each Course: All CTE courses_____ Program Fees: $_____ Curriculum Fees: $ 40 each Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes: • The following Outlier by Savvas titles have been included in this bid, at the $225 price: o Calculus I o College Algebra o Computer Science I o Intro to Astronomy o Intro to Business o Intro to Financial Accounting o Intro to Macroeconomics o Intro to Statistics o Precalculus • Each course license is valid for one student/one course for the duration of the school year. • If multi-year pricing is required, Outlier courses offered at $225 are eligible for 25% discount via 3-year license or 35% discount for a 5-year license. • If multi-year pricing is required, Savvas CTE courses offered at $40 are eligible for a 10% discount via 3-year license or 25% discount for a 5-year license. • For Computer Science I and Intro to Business, customer would grade a limited number of manually graded assignments with appropriate training support and rubrics included in license fee.
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students: All course materials for students and teachers are included within the course. No additional purchases are necessary, with the exception of appropriate software programs (Microsoft Office, Adobe) being available to students.

Exam Fees	$0_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site: No materials required. $3500. *Note: this is only available for Savvas CTE.* • Webinar/Virtual: No materials required. $750 for virtual training to include all teachers.
Other Expenses:	
Optional Features/Add-ons:	Scoping the possibility of optional third-party transcripts for Outlier by Savvas.

Outlier by Savvas Pricing & ISBNs

FLEX Licenses

What is Outlier by Savvas?

Outlier is a fully online, asynchronous college course option for high schools. With Outlier, students can earn valuable college experience from their high school classroom. Each student who passes their course with a score of 70% or higher earns a recommendation of 2-3 Lower Division Baccalaureate credits from American Council on Education (ACE).

FLEX Licenses

FLEX ordering allows customers to purchase a number of licenses for the Outlier by Savvas national catalog now, and assign the licenses to specific courses in that catalog when they sign up students. Below are two FLEX options for Outlier by Savvas courses, which enable Knox County to purchase all of the titles listed in this proposal.

Price	Credit	Who grades?	Duration	Title Format in SAP/SF	ISBNS
$225	ACE Recom-mendation	Customer/ Auto	Full Year	OUTLIER26 FLEX NATCAT 1Y LIC	9798213202489
$300	ACE Recom-mendation	Savvas	Full Year	OUTLIER26 FLEX NATCAT 1Y LIC + GRADE	9798213202465

Option 1: The $225 option is a full-year college-level course that is eligible for ACE credit recommendation. In this case, multiple-choice assessments will be automatically graded by the Outlier LMS. Manual grading, when necessary (see notes on licenses below), is handled by the customer, with Savvas supplying resources and rubrics to support the grading process.

Option 2: The $300 option includes the same full-year course with Savvas providing manual grading, where necessary.

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Outlier by SAVVAS

Notes on Licenses:

- If multi-year licenses are required, courses priced at $225 can be discounted at 35% off for 5-year licenses, or at 25% off for 3-year licenses, with ISBNs available in advance of 2026-27 school year.
- Manual grading is only required for select assessments in Computer Science 1, Intro to Business, and Professional Communication ($300 pricing only applies to these courses).
- Licenses must be applied to a course start date during the fall of the year they are intended to be used. After the final start date passes, the licenses expire for the year.

Training and Ongoing Support for Outlier by Savvas

Savvas offers implementation support for *Outlier by Savvas*, our dual enrollment program which includes rigorous math, science, social studies, and business electives for students in grades 9-12. Our services include:

- **Administrator Marketing Toolkit:** Introduce staff, students, and families to *Outlier by Savvas* and help them select courses prior to school start
- **On-Demand Training / Platform Orientation:** Virtual, on-demand onboarding and training for students, Leadership Administrators, and Educators that includes the following:
  - Overview of policies, processes, and responsibilities related to *Outlier* courses
  - How to use available platform tools
  - How to sign students up for courses
  - How to monitor student progress, engagement, and grades
  - Scheduling and administering examinations and reporting academic integrity violations
- **Personalized Email Reminders:** Proactive messaging and guidance for school staff specifically targeting onboarding training and deadline reminders, and regular weekly emails throughout the course as a reminder of what's most important, right now, for their courses.
- **Lesson Plans:** Educators and Leadership Administrators have access to suggested lesson plans they can use during the most pivotal moments of an Outlier course and help them use class time most effectively. Each lesson plan includes learning outcomes and essential questions, recommended facilitator and student resources, and an outline of 45 minutes of learning activities, starting with an anticipatory set and closing with an exit ticket and homework (if applicable). Lesson plans cover topics such as:
  - Orienting students prior to beginning their Outlier course
  - Completing student registration
  - Exam and quiz administration
  - Assignment review
  - Guiding exam preparation
  - Post-exam review sessions
- **Online Resources:** Educator and Leadership Administrator self-service mySavvasTraining program page that includes detailed information for everything from the start of the onboarding and implementation process through managing courses.

Includes step-by-step instructions for all tools and processes a detailed explanation of policies and responsibilities, and FAQs.

Implementation Support Plan

With a qualifying purchase, the Outlier by Savvas team will provide a Customer Success Manager to help you meet your goals for your dual enrollment initiative. For your review, we are providing a sample implementation support plan below.

Timeline	Audience	Implementation Support
Upon adoption	▪ District Leaders ▪ School Leaders	**Implementation Call** Topics to include, but not limited to: ▪ Set goals and expectations ▪ Customer onboarding steps including rostering options ▪ Customer Communication Plan ▪ Overview of customer journey
BTS	▪ District Leaders ▪ School Leaders	**Leadership Administrator Training** ▪ Email sent confirming rostering/integration is complete ▪ Complete the final training ▪ Outline next steps
On-Demand **Self-Paced**	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**mySavvasTraining.com** Educators will have 24/7 access to online training and professional development resources. Based on individual programs, educators will have access to the following Savvas support: ▪ On-Demand Tutorials and Guides ▪ Library of Training Resources ▪ Transcript Feature
BTS	▪ Teachers ▪ Instructional Coaches ▪ Administrators	**Initial Training** Provides Leadership Administrators and Educators with an introduction to the *Outlier* platform and courses and helps them prepare for day one.
First 30 days	▪ Administrators	**Leadership Administrator Usage Check-in** Review the following metrics: ▪ Students enrolled/registered plus activity ▪ Teachers logging in and checking on student progress
Ongoing	▪ Teachers	**Engagement Emails**

	▪ Instructional Coaches ▪ Administrators	Updates on student data to include (not limited to): ▪ Student progress data ▪ Student's current grade progress
Middle of Year	▪ District Leaders ▪ School Leaders	**Middle of Year Check-in** Topics could include, but are not limited to: ▪ Review of original expectations and goal alignment ▪ Trending Data & Metrics and intervention Recommendations
End of Year	▪ District Leaders ▪ School Leaders	**End-of-Year Check-in / Summary** Topics to review ▪ Current grades ▪ How we aligned with expectations ▪ Transcript Information

Asynchronous Initial Training, Follow-up Session, and Customer Success Manager will be available BTS 2025.

Professional Learning Pricing for Outlier by Savvas

The below pricing applies to our Outlier offerings. Professional learning prices are subject to change annually on October 1st.

Savvas Professional Learning Services Pricing		
mySavvasTraining.com	Included with purchase	
Customer Service and Technical Support	Included with purchase	
Asynchronous Initial Training	Included with purchase	
Customer Success Manager	Included with qualifying purchase	
Virtual Pricing		
Session	**Length**	**Price**
Initial Training	2 hours	$800
Follow-Up Session	1 hour	$800
Onsite Pricing		
Initial Training	2 hours	$3,550

Outlier Professional Learning and Pricing

SAVVAS
LEARNING COMPANY

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Every student has the potential to change the world. It starts with students feeling a strong sense of belonging within a learning community that values their experiences, sets high expectations, and makes content meaningful and accessible. With our award-winning curriculum, teachers can create this community and engage all students in rigorous content that is characterized by inquiry, collaboration, and personalization.



Visit **Savvas.com/Insights** for free resources designed to inspire educators and keep them informed about the latest trends in next-generation learning.

Scan the code to learn more about **Savvas Learning Company**.

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Savvas.com

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Outlook

[External]Re: [External]Re: [External]Response- RFP No. 3688 for Advanced Academic Programs

From Kathryn Howe <kathryn.howe@savvas.com>
Date Tue 10/21/2025 1:38 PM
To Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Cc Tricia Seely <tricia.seely@savvas.com>

Hi, Rachel:

Savvas agrees to this revised sample contract language.

Many thanks,
Kathryn

On Tue, Oct 21, 2025 at 9:35 AM Rachel Cabrera <Rachel.Cabrera@knoxcounty.org> wrote:

> Hi Kathryn,
>
> I appreciate you getting back to me so quickly. After consulting with our legal department, I have attached a revised sample contract. In order to move forward in the evaluation, please review and email back stating whether Savvas Learning Company LLC agrees to the language by Wednesday, October 22nd .
>
> Thank you,
>
> Rachel Cabrera
>
> Knox County Procurement Division
>
> 1000 N. Central St.
>
> Suite, 100
>
> Knoxville, TN 37917
>
> Ph: 865-215-5751
>
> Fax: 865-215-5778
>
> rachel.cabrera@knoxcounty.org
>
> KNOX COUNTY TENNESSEE

From: Kathryn Howe <kathryn.howe@savvas.com>
Sent: Monday, October 20, 2025 10:42 AM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Cc: Tricia Seely <tricia.seely@savvas.com>
Subject: [External]Re: [External]Response- RFP No. 3688 for Advanced Academic Programs

Good morning, I am back!

After checking with legal and finance, Savvas withdraws our exceptions with the comment below about the limitation of liability language:

Regarding Savvas' exception to Section II, (sub)Section 2.15, Limitations of Liability (page 5), Savvas will withdraw the overall exception; however, we request that consequential damages be removed from the list of liability exclusions since damages due to IP infringement could be argued to be consequential damages. Savvas is happy to discuss further if the District does not agree.

Thanks very much, Rachel.

Please let me know if you have questions or need anything further.

Kathryn

On Mon, Oct 20, 2025 at 9:01 AM Rachel Cabrera <Rachel.Cabrera@knoxcounty.org> wrote:

> Hi Kathryn,
>
> I appreciate the update.
>
> Thank you,
>
> Rachel Cabrera
>
> Knox County Procurement Division
>
> 1000 N. Central St.
>
> Suite, 100
>
> Knoxville, TN 37917
>
> Ph: 865-215-5751
>
> Fax: 865-215-5778
>
> rachel.cabrera@knoxcounty.org
>
> 
>

From: Kathryn Howe <kathryn.howe@savvas.com>
Sent: Friday, October 17, 2025 6:54 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]Response- RFP No. 3688 for Advanced Academic Programs

Hi, Rachel:

Just a note to let you know Savvas has received your email about our proposal exceptions, and I am following up with our legal team to respond by Tuesday as directed. Thank you!!

Have a great weekend,
Kathryn

--

Kathryn Howe
Proposal Manager, Solutions Alignment Team (Iowa City)
Savvas Learning Company

Email: kathryn.howe@savvas.com
Mobile: 319.621.7084

Email proposals@savvas.com for proposal assistance
****NEW** Submit an Assistance Request Form for rubric support**
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Kathryn Howe
Proposal Manager, Solutions Alignment Team (Iowa City)
Savvas Learning Company

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Knox County Government

and

The Chancellor, Masters, and Scholars of the University of Cambridge

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and The Chancellor, Masters, and Scholars of the University of Cambridge, hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this Contract.** This Contract commences on the 1st day of April 2026 and ends the 30th day of September 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. Upon the mutual agreement of the vendor and the County, the award may be extended for five (5) additional one-year periods. This may result in a total of five (5) years, five (5) months and four (4) weeks. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. **Subcontracting/partnerships:** Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. **Payment.** Contractor warrants that the pricing shall remain firm for the initial period. At the end of the first period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. **Inspection and acceptance:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. **Termination.** Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than sixty (60) business days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least sixty (60) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract. Termination of this Agreement shall not affect the ability of any student enrolled at the time of termination to complete their course(s) (including any applicable assessments) pursuant to the terms and conditions in place at enrollment. The provisions of the Handbook and all applicable fees shall continue to apply.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. **Appropriations.** In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. **Contractor Default:** Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. **Independent contractor.** Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. **Compliance with all federal, state, and municipal laws.** Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. **Criminal history records check:** Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. **Severability clause.** If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. **Prohibition against assignment.** Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. **This Contract** shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. **Right to inspect.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. **Nondiscrimination and non-conflict statements.** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. **Books and records.** Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will be provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any

kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted, with the exception of student assessment results retained solely for verification purposes. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I (Attachment A)
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, Terms and Conditions and Handbook for Advanced Academic Programs and Addendum I (Attachment B)
C. Clarifications (Attachment C)

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____
BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**
MAYOR – Signature **MAYOR**

Date:_____

KNOX COUNTY LAW DIRECTOR'S OFFICE
CONTRACT NO. 26-105 (e)
APPROVED AS TO LEGAL FORM **KNOX COUNTY, TENNESSEE**

_____ _____
LAW DIRECTOR – Signature **LAW DIRECTOR – Printed Name**

Date: 2/20/2026

CONTRACTOR

_____ _____
AUTHORIZED SIGNATURE **CONTRACTOR – Printed Name**

THE CHANCELLOR, MASTERS, AND SCHOLARS OF THE UNIVERSITY OF CAMBRIDGE
COMPANY NAME

Date:_____

The Procurement Division of Knox County, Tennessee will receive sealed proposals for the provision of **Advanced Academics Program** as specified herein. Proposals must be received by **2:00 p.m.** on **October 14, 2025**. Late proposals will neither be considered nor returned.

Deliver Proposals To:

Proposal Number 3688
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, Tennessee 37917

The Proposal Envelope must show the Proposal Number, Proposal Name & Proposal Closing Date.

SECTION I PROPOSAL PREPARATION AND SUBMISSION

1.1 **ADDITIONAL INFORMATION:** Knox County wants requests for additional information routed to Jay Garrison, Procurement Coordinator, CPPO, CPPB at 865.215.5767. Questions may be faxed to 865.215.5778 or emailed to jay.garrison@knoxcounty.org. If you have not heard from the Buyer in a reasonable amount of time, please call for further assistance. Information about the Knox County Procurement Division and current solicitations may be obtained on the Internet at www.knoxcounty.org/procurement.

1.2 **ACCEPTANCE:** Vendors shall hold their price firm and subject to acceptance by Knox County for a period of one hundred twenty (120) business days from the date of the proposal closing, unless otherwise indicated in their proposal.

1.3 **ALTERNATIVE PROPOSALS:** Knox County will not accept alternate proposals (those not equal to specifications) unless authorized by the Request for Proposal.

1.4 **AUDIT HOTLINE:** Knox County has established an Audit Hotline to report potential fraud and waste. To report potential fraud, waste or abuse, please file a report online by accessing http://www.knoxcounty.org/audit/hotline.php.

Vendors are hereby cautioned that this Audit Hotline does not replace the Award Protest Procedures found in Section VI, Item M of the Knox County Procurement Regulations.

1.5 **AWARD:** Award will be made to the most responsive, responsible proposer(s) meeting specifications and presenting the product(s) and/or service(s) that is in the best interest of Knox County. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple award. Knox County reserves the right to not award this proposal. Award will be made in accordance with the evaluation criteria specified herein.

1.6 **BUSINESS OUTREACH PROGRAM:** Knox County has established a Business Outreach Program which has the responsibility of increasing opportunity for small, minority and women owned businesses. This is being accomplished through community education programs, policy edification, active recruitment of interested businesses and process re-engineering.

Knox County is committed to ensuring full and equitable participation for all disadvantaged businesses. Knox County welcomes submittals from those disadvantaged businesses that have an interest in providing goods and/or services listed herein. In addition, Knox County strongly encourages the inclusion of disadvantaged businesses by non-disadvantaged Contractors who wish to partner or subcontract portions of this agreement in order to accomplish the successful delivery of goods and/or services. If you are a disadvantaged business and would like additional information about our Business Outreach Program, please contact:

Diane Woods, Business Outreach Administrator
Telephone: 865.215.5760
Fax: 865.215.5778
Email: diane.woods@knoxcounty.org

1.7 **CONFLICT OF INTEREST:** Vendors must have read and comply with the "Non-Conflict of Interest" statement provided in the vendor registration process prior to the closing of this solicitation. Knox County's Non-Conflict of Interest Policy is available for review at https://www.knoxcounty.org/purchasing/conflict_policy.php.

1.8 **COPIES:** Knox County requires that proposals be submitted as one (1) marked as original and one (1) exact copy. **Proposers must submit with their written response an exact electronic version of their proposal in a single PDF file on a flash drive format.**

1.9 **DECLARATIVE STATEMENTS:** Any statement or words (e.g.: must, shall, will) are declarative statements and the vendor must comply with the condition. Failure to comply with any such condition may result in the proposal being considered non-responsive and disqualified.

1.10 **ELECTRONIC TRANSMISSION OF PROPOSALS:** Knox County's Procurement Division will not accept electronically transmitted proposals. Facsimile and email submissions are strictly prohibited. Due to the nature of the information requested, all submissions shall be in written format.

1.11 **HOW TO DO BUSINESS:** Knox County utilizes a web-based Procurement software system, "KnoxBuys." The system provides our clients (vendors, county departments and the citizens of Knox County) with a more enhanced and end-user friendly means of accessing our services. The system allows for on-line vendor registration and maintenance, electronic receipt of purchase orders, on-line retrieval and submittal of quotes, bids and proposals for our vendor-clients and on-line requisitioning and receiving for our county departments. In order for the County to maximize its investment and minimize the cost associated with office operations, we need your help. When doing business with Knox County, we are urging you to please go to our website at www.knoxcounty.org/procurement, register as a vendor in our on-line Procurement system, "KnoxBuys," if you have not done so and whenever possible to conduct your business with the County through this site. If you have any questions, please contact the Procurement Division Representative listed in Section 1.1 of this document.

1.12 **INCURRED COSTS:** Knox County will not be responsible for any costs incurred by the proposer in the preparation of their proposal.

1.13 **MULTIPLE PROPOSALS:** Knox County will consider multiple proposals that meet specifications.

1.14 **NON-COLLUSION:** Proposers, by submitting a signed proposal, certify that the accompanying proposal is not the result of, or affected by, any unlawful act of collusion with any other person or company engaged in the same line of business or commerce, or any other fraudulent act punishable under Tennessee or United States law.

1.15 **PAYMENT METHOD:** Knox County will utilize a Purchase Order for placing an order for products and/or services. Purchase Orders will be issued from the Knox County Procurement Division via the method selected by the vendor during registration. The Purchase Order will detail the quantity, specific item(s) and the contracted price for each item. Work on this project must not commence until a signed Purchase Order is issued by Knox County Procurement.

1.16 **POSSESSION OF WEAPONS:** All vendors, their employees and their agents are prohibited from possessing any weapons on Knox County property without prior written consent from the County. In the case of a vendor whose Contract requires possession of firearms or other weapons to successfully complete their Contract, vendor must provide personnel who are bonded to bear said weaponry.

1.17 **PROCESSING TIME FOR PAYMENT:** Vendors are advised that a minimum of thirty (30) days is required to process invoices for payment.

1.18 **PROOF OF FINANCIAL AND BUSINESS CAPABILITY:** Vendors must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these specifications. Knox County will make the final determination as to the vendor's ability.

1.19 **PROPOSAL DELIVERY:** Knox County requires proposers, when hand delivering proposals, to time and date stamp the envelope before depositing it in the bid box. Knox County will not be responsible for any lost or misdirected mail sent by common carrier, nor will Knox County be responsible for proposals delivered to addresses or Suites other than the delivery address and Suite specified at the top of this solicitation. The time clock in the Procurement Division shall serve as the official record of time.

Solicitations must be in a sealed envelope/box prior to entering the Procurement Division office. Procurement Division personnel are not allowed to see the submittal nor assist in placing documents in an envelope/box. Additionally, the Procurement Division is not responsible for providing materials (e.g. envelopes, boxes, tape) for submittals.

1.20 **RECYCLING:** Knox County, in its continuing efforts to lessen the amount of landfill waste and to further recycling efforts, requests that proposals being submitted on paper shall:

1.20.1 Be submitted on recycled paper;
1.20.2 Not include pages of unnecessary advertising;
1.20.3 Be made on both sides of each sheet of paper.

1.21 **RESTRICTIVE OR AMBIGUOUS SPECIFICATIONS:** It is the responsibility of the prospective proposer to review the entire Request for Proposal packet and to notify the Procurement Division if the specifications are formulated in a manner that would unnecessarily restrict competition. Any such protest or question regarding the specifications or proposing procedures must be received in the Procurement Division by **September 26, 2025 at 4:30 p.m. local time**. These requirements also apply to specifications that are ambiguous.

1.22 **SIGNING OF PROPOSALS:** In order to be considered, all proposals must be signed. Please sign the original in blue ink. By submitting a signed letter authorizing the submission of the proposal, the vendor acknowledges and accepts the terms and conditions stated in the proposal document.

1.23 **TAXES:** Knox County purchases are not subject to taxation. Tax exemption certificates will be provided upon request.

1.24 **TITLE VI OF THE 1964 CIVIL RIGHTS ACT AND TITLE IX OF THE EDUCATIONAL AMENDMENT OF 1972:** "Nondiscrimination in Federally Assisted Programs"—"No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." 42 U.S.C. Section 2000. It is the policy of Knox County Government that all its services and activities be administered in conformance with the requirements of Title VI and Title IX.

1.25 **UNFORESEEN CIRCUMSTANCES:** During periods of closure due to unforeseen circumstances in Knox County or closures at the direction of the Knox County Mayor, the Procurement Division will enact the following procedures in regard to solicitations and closures:

- If the Mayor closes the Administrative offices prior to the time set for solicitation opening of any business day, all solicitations due that same day will be moved to the next operational business day.
- Other unforeseen circumstances shall be at the sole discretion of the Procurement Director.
- Knox County shall not be liable for any commercial carrier's decision regarding deliveries during any unforeseen circumstances.

1.26 **USE OF PROPOSAL FORMS:** Vendors must complete the proposal forms contained in the proposal package. Failure to complete the proposal forms may result in proposal rejection.

1.27 **VENDOR DEFAULT:** Knox County reserves the right, in case of vendor default, to procure the articles or services from other sources and hold the defaulting vendor responsible for any excess costs occasioned thereby. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidder's list for twenty-four (24) months.

1.28 **VENDOR REGISTRATION:** Prior to the submission deadline for this solicitation, ***ALL PROPOSERS MUST*** be registered with the Procurement Division. If you are not already a registered vendor with Knox County, register on-line at our website at www.knoxcounty.org/procurement and click on "Knox Buys" and then select "Online Vendor Registration." Vendors must be registered with the Procurement Division **prior** to submitting their proposal. Knox County shall not be responsible for technical difficulties experienced by vendors trying to register electronically less than twenty-four (24) hours prior to the proposal closing time.

1.29 **WAIVING OF INFORMALITIES:** Knox County reserves the right to waive minor informalities or technicalities when it is in the best interest of Knox County.

SECTION II OBLIGATIONS, RIGHTS AND REMEDIES

These terms and conditions shall be part of the Contract. Knox County reserves the right to negotiate other terms and conditions it deems appropriate and necessary under the circumstances to protect the public's trust.

2.1 **ALTERATIONS OR AMENDMENTS:** No alterations, amendments, changes, modifications or additions to this Contract shall be binding on Knox County without the prior written approval of the County.

2.2 **APPROPRIATION:** In the event no funds are appropriated by Knox County for the goods or services in any fiscal year, or insufficient funds exist to purchase the goods or services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

2.3 **ASSIGNMENT:** Contractor shall not assign or sub-contract this agreement, its obligations or rights hereunder to any party, company, partnership, incorporation or person without the prior written specific consent of Knox County.

2.4 **BOOKS AND RECORDS:** Vendor shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices at all reasonable times during the Contract period and for five (5) years from the date of the final payment under this agreement for inspection by County or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Vendor's costs of manufacturing, acquiring or delivering the products and services governed by this agreement.

2.5 **CHILD LABOR:** Contractor agrees that no products or services will be provided or performed under this Contract that have been manufactured or assembled by child labor.

2.6 **COMPLIANCE WITH ALL LAWS:** Contractor is assumed to be familiar with and agrees to observe and comply with all Federal, State, and Local laws, statutes, ordinances, and regulations in any manner affecting the provision of goods and/or services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

2.7 **CRIMINAL HISTORY RECORDS CHECK:** Any and all successful proposers, Contractor's employees, Contractor's subcontractors and the employees of any subcontractors must submit to a criminal history records check at the Contractor's expense, conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413. Proposers **must** submit with their proposals the Criminal History Affidavit of Compliance.

2.8 **DEFAULT:** If Contractor fails to perform or comply with any provision of this Contract or the terms or conditions of any documents referenced and made a part hereof, Knox County may terminate this Contract, in whole or in part, and may consider such failure or noncompliance a breach of Contract. Knox County expressly retains all its rights and remedies provided by law in case of such breach, and no action by Knox County shall constitute a waiver of any such rights or remedies. In the event of termination for default, Knox County reserves the right to purchase its requirements elsewhere, with or without competitive solicitation.

2.9 **GOVERNING LAW; VENUE:** This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

2.10 **INCORPORATION:** All specifications, drawings, technical information, Request for Proposal, Proposal, Award and similar items referred to or attached or which are the basis for this Contract are deemed incorporated by reference as if set out fully herein.

2.11 **INDEMNIFICATION—HOLD HARMLESS:** Contractor shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of Contractor, its subcontractors, suppliers, agents or employees.

2.12 **INDEPENDENT CONTRACTOR:** Contractor shall acknowledge that it and its employees serve as independent contractors and that Knox County shall not be responsible for any payment, insurance or incurred liability.

2.13 **INSPECTION AND ACCEPTANCE:** Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

2.14 **IRAN DIVESTMENT ACT:** By submission of this Request for Proposal response, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

2.15 **LIMITATIONS OF LIABILITY:** In no event shall Knox County be liable for any indirect, incidental, consequential, special or exemplary damages or lost profits, even if Knox County has been advised of the possibility of such damages.

2.16 **NO BOYCOTT OF ISRAEL:** Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the Contract engage in, a boycott of Israel. Proposers must submit with their proposals the completed Iran Divestment Act/No Boycott of Israel Affidavit.

2.17 **NON-DISCRIMINATION AND NON-CONFLICT STATEMENT:** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex **or** national origin any individual trait or characteristic found to be an illegal consideration, shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this agreement or in the employment practices of vendor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination. Contractor covenants that it complies with the Fair Wage and Hour Laws, the National Labor Relations Act, and other Federal and State employment laws as applicable. Contractor covenants that it does not engage in any illegal employment practices.

Contractor covenants that it has no public or private interest and shall not acquire directly or indirectly any interest that would conflict in any manner with the provision of its goods or performance of its services. Contractor warrants that no part of the total Contract amount provided herein shall be paid directly or indirectly to any officer or employee of Knox County as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor or consultant to Contractor in connection with any goods provided or work contemplated or performed relative to the agreement.

2.18 **ORDER OF PRECEDENCE:** In the event of inconsistent or conflicting provision of this Contract and referenced documents, the following descending order of precedence shall prevail: (1) Contract, (2) Request for Proposal, (3) Contractor's Response, (4) Award, (5) Special Terms and Conditions, (6) General Terms and Conditions, (7) Specifications, (8) Drawings.

2.19 **REMEDIES:** Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in Contract and in tort, including but not limited to, rejection of goods, rescission, and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

2.20 **RIGHT TO INSPECT:** Knox County reserves the right to make periodic inspections of the manner and means the service is performed or the goods are supplied and warehoused.

2.21 **SEVERABILITY:** If any provision of this Contract is declared illegal, void or unenforceable, the remaining provisions shall not be affected but shall remain in force and in effect.

2.22 **TAX COMPLIANCE:** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal or proposal and signature, it is current in its respective Federal, State, County, and City taxes of whatever kind or nature, and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Procurement Division.

2.23 **TERMINATION:** County may terminate this agreement with or without cause at anytime. In the event of termination by either party, fees due for services satisfactorily performed or goods accepted prior to the termination date shall be paid. Contractor shall not perform additional work without the expressed permission of County. In the event Contractor intends to interrupt or discontinue service under this Contract, Contractor agrees to give Knox County at least one hundred twenty (120) business days' advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

2.24 **WARRANTY:** Contractor warrants to Knox County that all items delivered and all services rendered shall conform to the specifications, drawings, solicitation and/or other descriptions furnished and/or incorporated by reference, and will be fit for the particular purpose purchased of merchantable quality, good workmanship, and free from defects. Contractor extends to Knox County all warranties allowed under the U.C.C. Contractor shall provide copies of warranties to the County upon request. Return of merchandise not meeting warranties shall be at contractor's expense.

SECTION III SPECIAL TERMS AND CONDITIONS

3.1 **INTENT:** The intent of this document is to set forth and convey to prospective proposers the general requirements for vendors to provide Knox County Schools with Advanced Academic Programs as desired by Knox County and Knox County Schools (KCS). Award will be based on Best Value. Best value means more than low cost. It includes cost, technical service quality, experience, qualifications and other factors detailed herein.

3.2 **ACCEPTANCE:** Vendors are advised that the payment of an invoice does not necessarily constitute as an acceptance of services that are provided. Acceptance requires a specific written action by Knox County so stating.

3.3 **ADDITIONS OR DELETIONS:** Knox County reserves the right to add or delete services as the need arises. If services are to be added, Knox County and the Contractor will arrive at a mutually agreed price. Any additions or deletions must be approved in writing by Knox County Procurement prior to any changes in service.

3.4 **AWARD LENGTH:** The pricing for this Contract must remain firm for thirty-six (36) months. However, due to the funding source Knox County does not allow automatic renewals, this Contract will need to be extended annually to continue services. Knox County will draft the Extension of Contract and send it to the vendor approximately ninety (90) days before expiration. The agreement may be renewed for two (2) one-year periods upon mutual consent, for a possible total of five (5) years. Following the initial thirty-six (36) months, the Contractor may request a change in price.

3.5 **CHANGES AFTER AWARD:** It is possible that after award, Knox County might change its needs or requirements. Knox County reserves the right to make such changes after consultation with the vendor. Should additional costs arise, Knox County reserves the right to consider accepting these charges provided the vendor can document the increased costs. Knox County also reserves the right to accept proposed service changes from the vendor if they will lower the cost to Knox County and/or provide improved service.

3.6 **COMMUNICATION:** The successful execution of this contract will require extensive communication between all involved parties. While information may be transmitted via telephone, it should always be followed up with an email. It is essential that the Contractor have an efficient email capabilities. The Contractor will be required to submit a list of individuals, along with direct phone numbers, cell phone numbers and email addresses for the agency's contacts. These individuals must be familiar with the Knox County Contract and have authority to make adjustments as requested by Knox County.

3.7 **COMPLIANCE WITH ALL APPLICABLE REGULATIONS:** Vendor agrees and covenants that the company, its agents and employees will comply with all City, County, State and Federal codes, laws, rules and regulations applicable to the business to be conducted under this contract. If the vendor performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, the vendor shall bear all costs arising from such work.

3.8 **CONTACT PERSONNEL:** Essential to the success of this Contract is the development of a good working relationship between the vendor and Knox County. It is imperative that the Knox County account be handled efficiently and professionally. Knox County should be assigned no more than two (2) vendor contacts to handle billing inquiries and service related issues. In the event on or both contacts leave the Knox County account, the vendor shall formally introduce the new contacts to Knox County personnel. These contacts must be knowledgeable of the County's account to avoid an interruption of service.

3.9 **CONTRACT EXECUTION:** The award of this proposal may result in a Contract between Knox County and the successful vendor(s). The Contract may require Knox County Board of Education and/or Knox County Commission approval. The successful vendor(s) may be required to be present at the Board of Education and/or County Commission meeting(s) to answer questions relating to the service to be performed. Adequate notification will be given by Knox County Procurement Division if the awarded vendor(s) will need to attend meetings. There shall be no cost to Knox County for attendance of the vendor(s). Knox County will draft the Contract. The Knox County Procurement Division will not accept any vendor's contract. A sample contract is under Exhibit B for review. If Master Agreements, Service Agreements, Terms and Conditions or other contract agreements are submitted they will not be accepted.

3.10 **CONTRACTOR DUTIES:** At the Contractor's own expense, the Contractor shall:

3.10.1 Provide competent supervision;
3.10.2 Provide competent personnel;
3.10.3 Take precautions necessary to protect persons or property against injury or damage and be responsible for any such damage or injury that occurs as a result of their fault or negligence.

3.11 **DESTINATION AND DELIVERY:** All shipments that are to be delivered must be Free on Board Destination to the department ordering the items. All shipping charges are to be included in the unit price of each item. All deliveries must be unloaded and delivered inside to the department location that is ordering the items.

3.12 **EVALUATION CRITERIA:** This proposal will be evaluated using the following criteria:

As per Section 1.5, Knox County will determine the award structure that is in its best interest.

Methodology	30 Points
Delivery of Service	30 Points
Experience & References	20 Points
Cost	20 Points

Knox County may select an Evaluation Committee for this solicitation to thoroughly review and score all submitted responsive and responsible proposals. Each evaluator will have the ability to award up to one hundred (100) points, based on the Evaluation Criteria, per submission.

3.13 **EVALUATION REVIEW:** Knox County reserves the right to use all pertinent information (including information learned from sources other than disclosed in the Request for Proposal process) that might affect the County's judgment as to the appropriateness of an award to the best evaluated vendor(s). This information may be appended to the proposal evaluation process results. Information on a service provider from reliable sources, and not within the service provider's proposal, may also be noted and made part of the evaluation file. Knox County shall have sole responsibility for determining a reliable source. Knox County reserves the right to conduct written and/or oral discussions/interviews after the proposal closing. The purpose of such discussions/interviews is to provide clarification and/or additional information to make an award that is in the best interest of Knox County.

3.14 **EXCEPTIONS TO SPECIFICATIONS:** Vendors taking exception to any part or section of these specifications shall indicate such exceptions on their submittal. A failure to indicate any exception(s) shall be interpreted as the vendor's intent to fully comply with the specifications as written. Conditional or qualified offer are subject to rejection in whole or in part. Any exceptions shall be included in Section V, Tab VIII of the submittal. **Do not strike through or in any other way alter the Request for Proposal. Exceptions listed within other sections of the submittal shall not be reviewed or considered.**

3.15 **GRANT FUNDING:** The products or services being procured under this solicitation are being funded by Federal Grant money. All awarded vendors will be required to adhere to Exhibit A of this solicitation in the performance of the Contract.

3.16 **GRATUITIES AND KICKBACKS:** It shall be a breach of ethical standards for any person or company to offer, give, or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim, or controversy or other particular matter, pertaining to any program requirement of a contract or subcontract or to any solicitation or proposal therefore. It shall be a breach of ethical standards for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or a person associated therewith, as an inducement for the award of a subcontract or order. Breach of the provisions of this paragraph is, in addition to a breach of this Contract, a breach of ethical standards which may result in civil or criminal sanction and/or debarment or suspension from being a contractor or subcontractor under Knox County contracts.

3.17 **IDENTIFICATION:** Employees of the Contractor shall have proper photo identification displayed at all times while on property belonging to Knox County.

3.18 **INSURANCE:** The successful vendor(s) must carry the insurance as indicated on the Insurance Checklist Attachment hereto. As proof of the vendor's willingness to obtain and maintain the insurance, the vendor must complete, sign and have its insurance agent sign the attachment and submit it with the proposal. Upon the Notification of Intent to Award, the successful vendor will be required to submit a Certificate of Insurance (COI) including any corresponding endorsement page(s) with the specified coverage and listing Knox County as an additional insured. It shall be the successful vendor's responsibility to keep a current COI and endorsement page(s) on file with Knox County Procurement for as long as the contract is in effect.

3.19 **INTERPRETATION:** No oral interpretation will be made to any vendor regarding the meaning of specifications or the Scope of Work. All questions are to be submitted in writing via email and will be answered in the form of an addendum to the solicitation by the Knox County Procurement Division, if applicable.

3.20 **INVOICE DETAIL:** Knox County is requesting invoices to show the following detail to help expedite review and payment. The Contractor(s) may be required to modify invoicing procedures to show the detail. All potential Contractors are hereby cautioned that Knox County will only pay from original invoices and not facsimiles or copies. Invoices which do not adhere to these details may be returned to the Contractor for correction.

3.20.1 The invoice must show the amount due to the Contractor by Knox County;
3.20.2 The invoice must show a summary of completed work;
3.20.3 Invoices are to be original and uniquely pre-numbered;
3.20.4 Invoices which do not show this information are subject to rejection.

3.21 **INVOICING PROCEDURES:** Knox County requests that invoices be easy to read and understand. Invoices are to be original and uniquely pre-numbered. There shall be no additional charge for this information and these procedures to be included. Each invoice shall include a summary of service(s) provided and shall list the associated unit price. Supporting documentation shall be included with invoices as applicable. Invoices without this information will be returned to the Contractor for correction.

Invoices shall be sent to the billing address indicated on the Purchase Order. Each department or division of Knox County is responsible for its own budget. Departments cannot charge or pay bills for another department. Therefore, it is critical that the successful Contractor's invoices specify the correct department. Do not credit payments to another department's account. Invoices must be submitted in triplicate and must match the corresponding Purchase Order number. There shall be no component billing. Mail invoices for Knox County Schools to:

Knox County Schools Finance Department
Post Office Box 2188
Knoxville, TN 37902-1805
invoices@knoxschools.org

3.22 **INVOICE REVIEW:** Knox County shall review all invoices for adherence to the terms and conditions of the Contract. Variations from the Contract and Contract pricing are strictly prohibited. Any variance found on the invoice will result in rejection of that invoice. Rejected invoices will be returned to the Contractor(s) for correction. Repeated variations may result in termination.

3.23 MINIMUM QUALIFICATION EXPECTATIONS:

3.23.1 Respondent must address all submittal requirements as defined under Section IV.

3.23.2 Respondent shall have a minimum of five (5) years of experience and sufficient capabilities to carry out the work contemplated, as well as the equipment and personnel available for the work.

3.23.3 If the respondent has a permanent office in Knox County, respondent must have a current business license issued by Knox County.

This requirement also applies to any of the Respondent's proposed subcontractors or subconsultants with a permanent office in Knox County. A Knox County business license is not required of any Respondent or proposed subcontractor or subconsultant who does not have a permanent office in Knox County. For more information, contact the Knox County Clerk's office at 865.215.2392.

3.24 NEGOTIATION: Knox County may select a successful proposer on the basis of initial offers received without discussions. Therefore, each proposal shall contain the proposer's best terms from a cost or price and service standpoint. Knox County reserves the right to enter into Contract negotiations with the highest-rated proposer. If Knox County and the selected proposer cannot negotiate a successful agreement, Knox County may terminate said negotiations and begin negotiations with the next highest-rated proposer. Knox County retains the right to negotiate with multiple proposers simultaneously. This process will continue until an agreement has been reached or all proposers have been rejected. No proposer shall have any rights against Knox County arising from such negotiations.

3.25 NEWS RELEASES BY VENDORS: As a matter of policy, Knox County does not endorse the services of a Contractor. A Contractor will not make news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County.

3.26 NO CONTACT POLICY: After the date and time that the vendor receives this solicitation, any contact initiated by any proposer with any Knox County representative, other than the Procurement Division representative listed herein, concerning this Request for Proposal, is strictly prohibited. Any such unauthorized contact may cause the disqualification of the proposer from this procurement transaction.

3.27 OFFER WITHDRAWAL: No proposal can be withdrawn after it is filed unless the proposer makes a request in writing to the Knox County Procurement Division prior to the time set for the closing of proposals or unless the County fails to accept within one hundred twenty (120) business days after the date fixed for the closing the Request for Proposal.

3.28 ORAL PRESENTATION/INTERVIEW: Knox County may require proposers to give oral presentations/interviews in support of their proposal or to exhibit or otherwise demonstrate the information contained therein. These presentations/interviews may be conducted virtually through video conferencing or in person.

Knox County reserves the right to request oral presentations and/or interviews during the initial evaluation phase. The County also reserves the right to complete the initial evaluation phase and then request oral presentations and/or interviews from all proposers or the highest rated proposers. In this case, the evaluations may be revised based on additional information received during presentations.

3.29 PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of thirty-six (36) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

3.30 **PROPOSAL CONTENT:** The proposer's response must contain a thorough description of the background of the proposer and sufficient evidence showing that the proposer is capable of providing the services. The proposer's response must thoroughly expound on the proposer's understanding of how the proposed services will meet Knox County's needs. The proposal must also contain an explanation of the implementation plan and the proposer's ongoing commitment to service.

3.31 **PROPOSAL EVALUATION:** In evaluation of submitted proposals, Knox County reserves the right to use any or all of the ideas from the proposals submitted without limitation and to accept any part or the entire successful proposal in selecting an operation which is judged to be in the best interest of Knox County. All material submitted becomes property of Knox County.

3.32 **PROPOSAL FORMAT:** This solicitation is in the Request for Proposal format. As the specified date and time, each proposer's name will be publicly read aloud. No further information will be given at that time. Evaluation of the proposals will proceed as expeditiously as possible and successful, as well as unsuccessful, notification will be given.

3.33 **PROPOSER OBLIGATION:** Proposers shall become fully acquainted with conditions relating to the scope of the work detailed in this Request for Proposal. Failure to become acquainted with the existing conditions shall in no way absolve the proposer of any obligations with respect to this Request for Proposal or the Contract.

3.34 **PUBLIC RECORDS ACT:** Knox County is subject to the Tennessee Open Records Act 10-7-503 et seq. Proposers are cautioned that all documents submitted on behalf of this Request for Proposal shall be open to the public for viewing and inspection.

3.35 **QUANTITIES:** Knox County does not guarantee any quantity of services will be utilized under this solicitation. Services will be utilized on an as needed basis.

3.36 **REJECTION OF PROPOSALS:** Knox County reserves the right to reject any and all proposals received as a result of this request and to waive any informality, technical defect or clerical error in any proposal, as the interests of Knox County may require. Non-acceptance of any proposal will be devoid of any criticism of the proposal and of any implication that the proposal is deficient in any manner. Non-acceptance of any proposal shall be construed as meaning simply that the County does not deem the proposal acceptable or that another proposal was deemed more advantageous to Knox County for the particular services proposed.

3.37 **REMOVAL OF CONTRACTOR'S EMPLOYEES:** Contractor agrees to utilize only experienced, responsible and capable people in the performance of the work. Knox County may require that the Contractor remove from the job covered by this Contract, including employees who endanger persons or property or whose continued employment under this Contract is inconsistent with the interest of Knox County.

3.38 **SUBMIT QUESTIONS:** Prospective proposers may submit questions concerning this solicitation until **September 26, 2025 at 4:30 p.m. local time**.

3.39 **SUSPENSION AND DEBARMENT:** Vendor will notify Knox County Government if they become suspended, debarred, or otherwise excluded from or ineligible for participation in Federal assistance programs or activities during the term of this proposal and during the term of any subsequent Contract for service.

3.40 **TENNESSEE REGISTRATION:** The successful proposer must meet any applicable State of Tennessee registration requirements.

SECTION IV SCOPE OF WORK

4.1 **BACKGROUND:** Knox County Schools (KCS) is a public education agency. It is responsible for the education of children from preschool through high school. There are approximately fifty-nine thousand (59,000) Pre-K through 12th-grade students and approximately seven thousand eight hundred (7,800) employees. For purposes related to this RFP, the district is comprised of ninety-two (92) schools that represent urban, suburban, and rural populations.

4.2 **FACILITIES & EQUIPMENT:** All facilities for training in Knoxville, TN will be provided by Knox County Schools. Upon request, Knox County will provide a computer and projection system, with accommodations for trainers to use their own computers.

4.2 **PARTICIPANTS:** The number of participants may vary. Vendors may work with an entire school/department staff, smaller school content teams and/or district teams, individuals, or any combination thereof. A defined number of training sessions or participants is not guaranteed. Participants will be staff members serving our students.

4.3 **PROGRAM CONTENT & METHODOLOGY:** Knox County Schools is seeking vendors to partner with our schools and district to provide high quality, rigorous academic programming for 9th through 12th grades which prepares our students to be successful in their next phase of life. The program must promote academic excellence and equity in the Early Postsecondary Opportunities, (EPSO), as listed on the Tennessee Department of Education website and listed in the Ready Graduate and/or College and Career Readiness accountability indicator.

More information on EPSO can be found at the following link: https://www.tn.gov/education/students/early-postsecondary.html

The Advanced Academics organization should provide a comprehensive program to include courses/curricular frameworks, assessments, services and supports that provide opportunities for students to demonstrate college and career readiness and have the potential to earn postsecondary credit. The curricular program should be of high-quality which includes discipline specific critical thinking, inquiry, reasoning and communication skills. The programming of the courses should support and encourage learner potential by challenging students to inquire skillfully, think critically, and reflect meaningfully. Students should have the opportunity to engage in learning across all content areas with an informed curiosity that will equip students to be successful in their future endeavors. These areas must be inclusive of, but not limited to: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education Fields, and Sciences. Programs must also offer courses individually and as a full diploma package. Upon completion of the learning, students should have the opportunity to demonstrate their mastery with a rigorous assessment that could culminate in credit through academically competitive colleges and universities.

The program must have or be actively in the process of developing a clear scope and sequence of support through its framework for instruction for students and teachers to identify and prepare students with potential in earlier grades (prior to the 9th grade), so schools can increase the percentage of KCS students in advanced coursework. Proposers must provide a comprehensive narrative statement detailing the scope and sequence of support utilized. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.

The program additionally should include services and supports for school and district staff that will prepare them to facilitate student progress in the program. Professional learning and training should include teachers as well as other staff members and administrators for schools and the district. The vendor must provide sustainable professional development through in-person trainings, with options for virtual meetings/trainings or video resources. There should also be teacher support materials provided digitally and/or in person which support the academic rigor of the program.

4.5 **DELIVERY OF SERVICE:** Proposers must provide comprehensive narrative statements that outline the implementation plan for their program. The implementation plan should clearly support, streamline and provide accountability for the identified deliverables. This plan may include operational recommendations for KCS that will improve the efficiency and efficacy of the program.

The program deliverables include:

- Supports for student content and skill development beginning minimally in the 9th grade.
- Alignment with Early Postsecondary Opportunities (EPSO).
- Opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit through both individual and full diploma package courses with rigorous assessments that may culminate in postsecondary credit, aligning with university admissions guidelines;
- Courses/curricular frameworks for multiple content areas including Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences with discipline specific critical thinking, inquiry, reasoning and communication skills.
- A scope and sequence of support, either in place or in development, utilized to identify student potential prior to the 9th grade that can increase the percentage of students in underserved populations in advanced coursework.
- Services and supports that prepare school and district staff to facilitate student progress in the program through in-person trainings with options for virtual meetings/training and video resources.

- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

4.6 **EXPERIENCE:** Proposers are to detail their organization's previous experience working with schools, districts, states, and/or countries to promote high levels of academic rigor for all learners which results in the opportunity to earn postsecondary credit. For applicable team members, proposers are to submit education credentials and relevant work experience that supports the program sought by this RFP. This information is to be submitted in Section V, Tab V of the Proposal.

Proposers must provide three (3) references relating to work of a similar scope completed within the last five (5) years. Include the name of the agency or institution, point of contact with both a telephone number and email address, and the nature and size of the Contract. **Do not list Knox County Government or Knox County Schools as a reference.** References shall be submitted on Attachment B of this RFP.

SECTION V PROPOSAL FORMAT

PROPOSAL INFORMATION: The following guidelines should be followed when responding to the Request for Proposal. Negligence in adhering to the criteria listed below will be considered when reviewing the responses and evaluating the proposers. Knox County reserves the right to reject any proposal for failure to comply with the requested response specifications. The County reserve the right to amend the Request for Proposal by addendum prior to the final date of proposal submission.

- Knox County requests proposals be in sufficient detail to address all requirements.
- The County requests responses be submitted in a three-ring binder containing sections separated by tabs. Do not submit spiral bound or glued responses.
- Please submit one (1) marked original and one (1) exact copy.
- Page numbers should be placed on the bottom center of pages.
- Proposers shall also submit an exact copy of the original proposal on a Flash drive. **This shall be in one (1) complete pdf file. Do not include multiple folders on the Flash drive.**

PROPOSERS MUST HAVE THEIR BINDERS IN THE EXACT FORMAT LISTED BELOW.
Each proposal must address all questions/statements listed in each tab completely.

TAB I COVER LETTER

Include cover letter authorizing the submission of the proposal signed by the principal of the company.

TAB II COMPANY PROFILE

- Company Name, Address Telephone/Fax numbers
- Contact name(s) and information
- Proposer's Vendor Number as assigned by Knox County
- Employer Identification Number (EIN)
- Knox County Business Tax License for Organization (if applicable)
- Knox County Business Tax License(s) for Sub-Contractor(s) (if applicable)
- Will you accept E-commerce for payment as detailed in Section 1.14?
- Acknowledgement of the receipt of any Addendum issued

TAB III PROGRAM CONTENT & METHODOLOGY (30 Points)

Proposers must demonstrate an understanding of Knox County's needs and fully explain their overall approach to meet the County's requirements. This must thoroughly describe how the proposed services will meet the requirements outlined in Section 4.4. Proposer must clearly address the following:

- Describe how the program aligns with Early Postsecondary Opportunities (EPSO).
- Describe how the program provides opportunities for students to demonstrate career readiness and the potential to earn postsecondary credit.
- Describe how the program addresses discipline specific critical thinking, inquiry, reasoning and communication skills.
- Describe how the program facilitates learning across the following content areas, at a minimum: Art, Language and Literacy (English and World Languages), Social Sciences, Mathematics, Career and Technical Education and Sciences. Detail any additional content areas offered.
- Describe the courses that are offered individually as well as those that are offered as a full diploma package.
- Outline the assessment process(es) and opportunities to earn college/university credit.
- Describe the scope and sequence of support utilized to identify student potential prior to the 9th grade, with an emphasis on how this process can increase the percentage of students in underserved populations in advanced coursework. If applicable, detail the stage of development that the program is in, along with an estimated timeline for completion.
- Describe how the program provides services and supports that will prepare school and district staff to facilitate student progress in the program
  - Detail the professional development models available and teacher support materials associated with the program.
- Proposer is to describe, in detail, their proposed approach to providing services and include excerpts and/or examples of course content and materials to be used, description(s) of recommended content proposed including objectives, research base, and training scripts. Proposer is to include samples of modules and/or curriculum used in past projects that are similar in scope to the proposed training.

TAB IV **DELIVERY OF SERVICES (30 POINTS)**

Proposers must provide an implementation plan and comprehensive narrative statements that outline the management plan it intends to follow. This information should fully illustrate how the plan will serve to accomplish the work and furnish the deliverables described within the County's project schedule.

- Courses/curricular frameworks for multiple content areas;
- Rigorous assessments that culminate in postsecondary credit, aligning with university admissions guidelines;
- Professional learning opportunities for educators that deliver on high-quality courses/curricular frameworks;
- Training and/or professional learning offerings about the services and supports included in the program; and
- Supports for student content and skill development beginning minimally in the 9th grade.
- Proposers do not have to provide complete curriculum. Samples are sufficient.

TAB V **EXPERIENCE AND REFERENCES (20 Points)**

Proposers are to detail the Company's experience relating to the services requested in this RFP, specifically:

- Proposers must state the organization's number of years in business and provide a description of the organization to include office location(s).
- Proposers must describe the organization's experience with similar projects.
- Proposers must provide an organizational chart that illustrates the organization of the project team. The organizational chart must illustrate the lines of authority and designate the individual responsible and accountable for the completion of each component and deliverable of the RFP. Information about each person listed should include their a) title b) resume, including advanced education credentials, relevant work experience, demonstrated outcomes, independent research, and publishing in the subject areas addressed by this RFP, as applicable c) number of years with the organization and d) description of the type of work the individual will perform
- References (Attachment B)

TAB VI **PROPOSED COSTS (20 Points)**

Costs proposals must include all direct and indirect costs associated with the performance of the service. Proposed costs should be inclusive of all expenses. Proposer may include the methodology used to determine their proposed cost. Pricing must include all expenses, including transportation and ancillary out-of-pocket charges, if applicable. Travel expenses are not to exceed the per diem rates set by GSA. There will be no reimbursement for any such charges.

Per Attachment A, please list the itemized costs for each of the following (as applicable), noting any volume discounts:

- Annual Candidacy/Membership Fees
- School Application Fees
- Annual Program or Curriculum Fees
- Curricular Materials
- Exam Fees
- Professional Development (inclusive of materials and travel expenses, as applicable)
  - o On-Site Format
  - o Webinar/Virtual Format
- Other Expenses
- Optional Features/Add-Ons

NOTE: This tab shall only be included in the original document and the exact electronic version. This tab is to be submitted under separate cover from the other parts of the vendor's proposal. This tab will be reviewed after the other sections of the vendor's proposal have been reviewed and scored.

TAB VII **OTHER INFORMATION**

Proposers may include any other information deemed pertinent to this solicitation.

TAB VIII **EXCEPTIONS**

Please note any and all exceptions taken to any part this Request for Proposal. If none are taken, please clearly state so. Do not mark through or otherwise alter the language of this RFP in your response.

TAB IX **ATTACHMENTS**

- Pricing (Attachment A)
- Insurance Checklist (Attachment C)
- Criminal History Check Affidavit (Attachment D)
- Iran Divestment Act (Attachment E)
- General Federal Funding Requirements (Exhibit A)

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

Annual Candidacy/ Membership Fees	$_____per school Notes:
Application Fees	$_____per school Notes:
Annual Program Fees & Curriculum Fees (per course)	Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Course: _____ Program Fees: $_____ Curriculum Fees: $_____ Notes:
Curricular Materials	Please detail required materials and associated cost(s) for both teachers and students:
Exam Fees	$_____per exam Notes:
Professional Development (On-Site and Webinar/Virtual Format)	Please detail required materials and associated cost(s): • On-Site • Webinar/Virtual
Other Expenses:	
Optional Features/Add-ons:	

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: _____

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

Name of Firm: _____

Contact Person: _____ Phone Number: _____

Email Address: _____ Fax Number: _____

Nature of Contract: _____

Services Provided: _____

Dollar amount: $ _____ (over life of contract)

Contract start date: _____ Contract end date: _____

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident) $1,000,000 BODY INJURY (Per–Person) BODY INJURY (Per-Accident) PROPERTY DAMAGE (Per-Accident
YES	4.	COMMERCIAL GENERAL LIABILITY	LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE $ 1,000,000
			FIRE LEGAL LIABILITY $ 100,000
			MED EXP (Per person) $ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY $ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE $ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE $ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2.000.000 ANNUAL AGGREGATE
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1.000.000 ANNUAL AGGREGATE
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000
NO		PROFESSIONAL LIABILITY	
NO NO NO NO	10.	ARCHITECTS &ENGINEERS ASBESTOS & REMOVAL LIABILITY MEDICAL MALPRACTICE MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM $2,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM $1,000,000 PER OCCURRENCE/CLAIM
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)
NO	13.	MOTOR CARGO INSURANCE	
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$
NO	17.	DISHONESTY BOND	$
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.
NO	19.	USL&H	FEDERAL STATUTORY LIMITS

20. Carrier rating shall be Best's Rating of A-VII or better or its equivalent.

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.

23. Certificate of Insurance shall show the RFP number and title.

Insurance Agent's Statement and certification: I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.

Agency Name: _____Authorizing Signature: _____

Proposer's Statement and Certification: If awarded the Contract, I will comply with the Contract insurance requirements.

Proposer's Name: _____Authorizing Signature: _____

ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, _____, president or other principal

Officer of _____, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

_____
President or Principal Officer

For: _____
Name of Company

STATE OF TENNESSEE}
COUNTY OF }

Subscribed and sworn before me by _____,

President or principal officer of _____,

On this _____ day of _____ 2_____.

_____
Notary Public

My Commission expires: _____

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature:

_____

(sign in blue ink)

Title: _____ Date: _____

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying,'' in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

OFFICE OF COUNTY MAYOR GLENN JACOBS

Procurement Division, 1000 N. Central Street, Suite 100, Knoxville, TN 37917

ADDENDUM I
REQUEST FOR PROPOSAL 3688
ADVANCED ACADEMIC PROGRAMS

ADDENDUM DATE: September 30, 2025

BUYER: Jay Garrison, CPPO, CPPB

ORIGINAL CLOSING DATE: October 14, 2025 at 2:00 PM

THE FOLLOWING IS TO BE AMENDED:

ATTACHMENT A, COST, WILL BE DELETED AND REPLACED WITH A NEW COST SHEET. SEE ATTACHED. FAILURE TO PROVIDE THE REVISED COST SHEET AND ALL REQUIRED ITEMS WILL BE JUST CAUSE TO DEEM YOUR SUBMITTAL AS NONRESPONSIVE.

SECTION 3.4 SHALL BE AMENDED TO THE FOLLOWING:

AWARD LENGTH: Knox County intends to issue a one (1) year award with an option to renew upon consent of both Knox County and the awarded Contractor. This term bid agreement may be renewed for an additional four (4) years, one (1) year at a time for a possible total of five (5) years. Knox County reserves the right to revoke the award if a pattern of unavailability arises with the successful proposer(s).

SECTION 3.29 SHALL BE AMENDED TO THE FOLLOWING:

PRICING: The proposer(s) warrants that the unit price stated shall remain firm for a period of twelve (12) months from the first day of the Contract period. If the Contractor's price is increased after the first contract period, Knox County must be given a written notice to consider. Such a request shall include as a minimum, (1) the cause for the adjustment; (2) the amount of the change requested with documentation to support the requested adjustment. Price increases will only be considered at the renewal period(s). If the price increase is rejected the contractor may:

- Continue with the existing prices;
- Request a lower price increase;
- Not accept the renewal offer.

If a price increase is approved by Knox County, the approval notification will be done in writing and the Contractor will be notified of the new price schedule and effective date of increase. This documentation will become part of the proposal file. No approvals will be authorized verbally.

THE FOLLOWING IS FOR CLARIFICATION:

QUESTION 1: Could you please clarify whether the accrediting organization that issues any certifications to students must be Tennessee-based, or if national accreditation is acceptable?

ANSWER 1: National accreditation is acceptable.

QUESTION 2: We understand that Knox County intends to draft the contract. As a global provider of specialist exam services, we typically begin with a bespoke contract template that includes essential terms specific to our services—such as exam security protocols—which may not be covered in a standard agreement. This template has been successfully used as a starting point with many U.S. districts. For efficiency during the contracting phase, would Knox County be amenable to reviewing and potentially using our template as the basis for the agreement?

ANSWER 2: The County's Contract will take precedence over all other Contract documents. Proposers may submit a separate document with other terms and conditions, however, conflicting terms and conditions between the County's Contract and any other agreement will be governed by the County's Contract.

QUESTION 3: The RFP references Exhibit B as a sample contract, but it appears to be missing from the document. Could you kindly provide a copy?

ANSWER 3: See attached.

QUESTION 4: The RFP requests fixed pricing for the initial 36-month term. We typically offer fixed pricing with an annual inflationary adjustment. Could you advise on how Knox County would prefer suppliers to address inflationary increases in their proposals?

ANSWER 4: Knox County is amending this requirement to require fixed pricing for a period of 12 months from the date of contract commencement. No cost increases will be granted during any term of the contract.

QUESTION 5: Could you please clarify what is meant by "unit price" in this context? Is it intended to refer to pricing per student, per exam, per school, or another metric?

ANSWER 5: This requirement has been amended per the revised Cost sheet. See attached.

QUESTION 6: We have reviewed the Appendix C insurance requirements. Because we are an entity headquartered in the UK, we may not be able to comply with all of these requirements. Where we may need derogations e.g. it may not be possible to name you as an additional insured, how should we indicate this?

ANSWER 6: This requirement cannot be waived. The County must be named additionally insured on the policy. Upon a notice of award to a proposer(s), the successful proposer(s) will be required to submit a current Certificate of Insurance along with all endorsement pages naming Knox County as additionally insured.

QUESTION 7: Do you want us to list all the AP courses that Knox has currently bought from us?

ANSWER 7: No. This is a new, standalone solicitation and previous experience with Knox County will not be considered.

QUESTION 8: In regards to samples, we were going to send one copy of each course student edition. Do you require digital access as well?

ANSWER 8: Digital access is not required, but acceptable.

QUESTION 9: Would the district consider an all-digital platform to fulfill this RFP's scope of work?

ANSWER 9: No. The County will not accept an all-digital platform.

QUESTION 10: Can the curriculum be supplemental to the courses or must it be core curriculum?

ANSWER 10: The curriculum can be supplemental.

End of addendum.

Jay Garrison, CPPO, CPPB
Procurement Coordinator

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost.
- Digital resources that the teachers and/or students would need to fully implement the program.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost).
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost).
- Software Services

Total cost for the scenario: $_____

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

Exhibit B

Knox County Government

and

(Contractor)

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and (Contractor), hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. Terms of this Contract. This Contract commences on the 1st day of December 2025 and ends the 30th day of November 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. The County intends to issue a one-year (1) award. Upon the mutual agreement of the vendor and the County, the award may be extended for four (4) additional years, one (1) year at a time. This may result in a total of five (5) years. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. Subcontracting/partnerships: Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. Payment. Contractor warrants that the pricing shall remain firm for the initial one (1) year period. At the end of the first one (1) year period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a

SAMPLE

Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. Right to inspect. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. Nondiscrimination and non-conflict statements. Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. Books and records. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding

of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the

SAMPLE

Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, Terms and Conditions, etc., for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____

BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ **GLENN JACOBS**

MAYOR – Signature **MAYOR**

Date:_____

SAMPLE

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO._____
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

_____
LAW DIRECTOR – Signature

_____
LAW DIRECTOR – Printed Name

Date:_____

CONTRACTOR

_____
AUTHORIZED SIGNATURE

_____
CONTRACTOR – Printed Name

(CONTRACTOR)
COMPANY NAME

Date:_____

SAMPLE

Knox County Schools

Advanced Academics Program

Prepared for: Knox County Procurement Division

Prepared by: The Chancellor, Masters, and Scholars of the University of Cambridge
(operating as Cambridge Assessment International Education)

Proposal Number 3688	RFP 3688
Submission Date	October 9th 2025
Primary Contact	Joette Viggiano, School Development Manager Joette.viggiano@cambridge.org (732) 239-8253

Binder Table of Contents

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Tab II – Company Profile

Tab III – Program Content & Methodology

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Tab V – Experience & References

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Tab VIII – Exceptions

Tab IX – Attachments (A, B, C, D, E) + Exhibit A & B

Tab 1: Cover Letter

Mark Cavone, Regional Director, International Group
Cambridge University Press & Assessment
165 Broadway, Floor 20
New York, NY 10006
USA

October 14, 2025

Proposal Number 3688
Knox County Procurement Division
Suite 100
1000 North Central Street
Knoxville, Tennessee 37917

To Whom It May Concern,

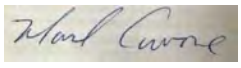
We are very pleased to enclose our proposal to work with Knox County Public Schools for the provision of Advanced Academic Programs. Inside, you will find a wealth of information about Cambridge University Press and Assessment, which formally operates under the name the Chancellor, Masters and Scholars of the University of Cambridge, more commonly known as the University of Cambridge. Our principal place of business is The Triangle Building, Shaftesbury Road, Cambridge, CB2 8EA, United Kingdom.

We were established in 1858 and have been providing academic programming and assessments since that time. Herein, you have been provided with details of our products and services. The proposal includes all direct and indirect costs associated with program implementation.

We appreciate the time you are taking to review all we have to offer Knox County Public Schools. I am eager to hear your comments and to answer any questions that you may have. Mark is our executive sponsor in the United States and is always available at 1-917-635-1702.

Thank you for your time and attention. We look forward to the possibility of working with you in the near future.

Sincerely,





Mark Cavone
Regional Director
North America

Adrian Cockell
Director, Business Development
Cambridge, UK

Tab II: Company Profile

Cambridge University Press and Assessment formally operates under the name of the Chancellor, Masters and Scholars of the University of Cambridge, more commonly known as the University of Cambridge. Our principal place of business is The Triangle Building, Shaftesbury Road, Cambridge, CB2 8EA, United Kingdom.

Contact numbers are as follows: Telephone: +44 (0)1223 553311 and Fax: +44 (0)1223 460278.

Cambridge is a division of the University of Cambridge and has approximately 160 years of experience providing goods similar in type and quantity as required by this solicitation. Cambridge International Education is a not-for-profit organization based in Cambridge, England, dedicated to designing and delivering assessments to over 8 million learners in over 160 countries.

The Chancellor, Masters and Scholars of the University of Cambridge is a registered vendor with Knox County and has been assigned Vendor # 19570. Our EIN# is 13-1599108 and we do accept e-commerce for payment.

We acknowledge receipt of Addendum I. We also have read and agree to comply with Knox County Charter Section 9.08 Non-Conflict of Interest.

Name & Title	Role for Knox County Schools	Contact
Joette Viggiano, School Development Manager	Will serve as your primary strategic partner at the beginning of our relationship. Their role is to work with district and school leadership to explore how our programs can align with your long-term educational goals and to facilitate the initial adoption and investment.	Cell #: (732) 239-8253 Work #: (786) 918-8470 Joette.viggiano@cambridge.org
Jeff Brewer, School Implementation Manager	Once a partnership is established, the School Implementation Manager becomes your hands-on guide. Their role is to ensure a successful launch, providing the necessary training, technical support, and project management to integrate the program seamlessly into your schools.	Work# +1 (332) 895-0836 Email: jeffery.brewer@cambridge.org
Mark Cavone, Regional Director for North America	Ensures that the North American regional strategy and support is in alignment with district needs and priorities.	Cell# 1-917-635-1702 Work# 1-917-522-2141 Email: mark.cavone@cambridge.org

Tab III: Methodology

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Introduction

Cambridge International Education is fully prepared to meet the program content and methodology requirements outlined by Knox County Schools. Our comprehensive academic program for grades 9–12 is designed to promote academic excellence and equity, align with Tennessee's Early Postsecondary Opportunities (EPSO), and prepare students for success in college, career, and life. Through rigorous coursework, validated assessments, and robust educator support, we offer a flexible and inclusive framework that meets the needs of diverse learners and supports the district's goals for readiness and achievement.

Cambridge International Education is the awarding body of the International Education group at Cambridge University Press & Assessment, part of the University of Cambridge. Our International Education group collaborates with schools worldwide to build an education that shapes knowledge, understanding, and skills. Together, we give learners the confidence they need to thrive and make a positive impact in a changing world.

We offer a globally trusted and flexible framework for education from age 3 to 19 (the Cambridge Pathway), informed by research, experience, and listening to educators. With recognized qualifications (such as Cambridge IGCSE and AS & A Level), high-quality resources, comprehensive support, and valuable insights, we help schools prepare every student for the opportunities and challenges ahead. Together, we help Cambridge learners be ready for the world.

Knox County Schools (KCS) serves 58,838 students across 94 schools, with 47 percent performing at or above grade level. The district includes 20 high schools, with a four-year graduation rate of 91.9 percent. Of those graduates, 61.9 percent complete a Career and Technical Education (CTE) concentration, and 67.5 percent enroll in postsecondary education the fall following graduation. KCS is committed to increasing student achievement and already offers rigorous academic programs such as Advanced Placement (AP) and International Baccalaureate (IB). In June 2025, KCS registered Powell High School as its first Cambridge school, expanding access to globally benchmarked academic pathways.

Cambridge believes all students have potential. Its programs are intentionally inclusive, designed to support academically advanced learners as well as those who may be underrepresented in traditional advanced coursework. The curriculum and assessments are adaptable, ensuring students at varying performance levels are both challenged and supported. This approach aligns with KCS's commitment to equity and access, providing rigorous academic experiences that prepare students for college, career, and lifelong learning.

Our comprehensive education program supports students in grades Pre-K through 12. This includes detailed syllabi for grades 9–12, curricular frameworks (schemes of work), validated assessments, scoring rubrics, professional development for educators, and ongoing implementation support. These resources are designed to enhance both teaching and learning, ensuring educators are equipped to deliver high-quality instruction and students are supported in achieving academic success.

Higher order thinking skills are a fundamental part of the Cambridge program, intentionally integrated throughout all aspects of design, pedagogy, assessment, and outcomes. Cambridge doesn't just acknowledge their essential contribution to students' academic and career achievement; we tell students how they can practice them, and we show educators how to teach them. Cambridge fully supports educators and learners by providing all resources necessary to successfully teach or complete each course. Cambridge assessments require demonstrations of the interaction between subject knowledge and higher order thinking skills. To effectively do this, assessments

include multiple opportunities for students to demonstrate what they know and can do and require them to do so in multiple different ways (e.g., exams, essays, experiments, team or individual research projects, oral defenses).

Cambridge International Education is uniquely positioned to support Knox County Schools in its mission to cultivate lifelong learners who contribute meaningfully to their communities. Through rigorous, inclusive, and globally recognized educational experiences, Cambridge empowers students to reach their full potential and equips educators with the tools they need to foster excellence in the classroom. In the sections that follow, this proposal will demonstrate how Cambridge's experience, resources, and approach align with and support the specific needs and goals outlined in the RFP.

Reference Documents

While teacher support and course materials are described later in this section, knowing where to find examples to refer to as you progress through the text may be helpful. We have included entire sets of course materials for three courses in Tab VII to illustrate our approach for supporting learning and instruction (described in Table 1). These courses are Pre-Advanced (IGCSE) English – First Language, Advanced (AS/A Level) English Language, and Advanced (AS/A Level), Global Perspectives and Research. Materials from other courses may be referenced in certain sections if they better demonstrate specific resources or philosophy.

TABLE 1. GUIDE TO REFERENCE DOCUMENTS PROVIDED IN TAB VII

Please note: we've included they AS English Language (9093) Syllabus, Question Paper, Mark Scheme, and Examiner Report for reference in the print copy. All the items listed below can be found in the electronic copy.

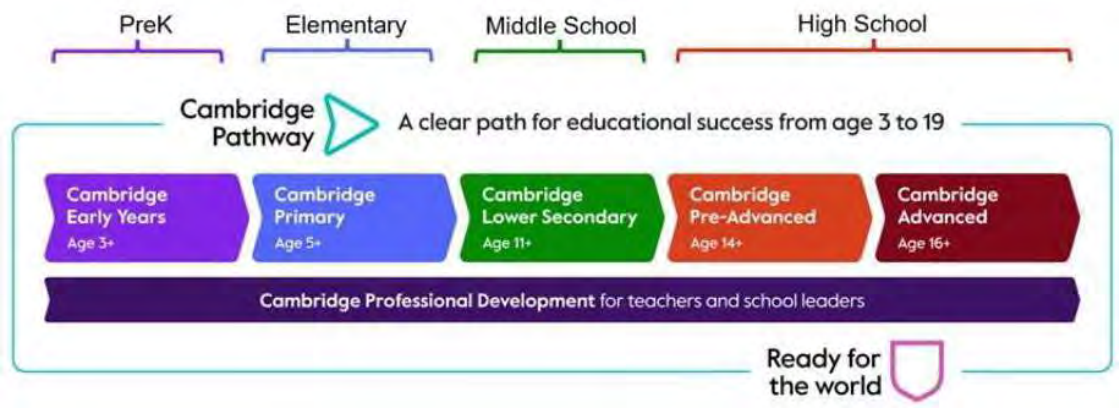
Course/Resource	Title of Document in Tab VII
IGCSE English - First Language (0500)	
Syllabus	Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Syllabus.pdf
Learner Guide	Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Learner Guide.pdf
Past Exam Paper	Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Specimen Paper 2.pdf Cambridge IGCSE English - First Language (0500) Specimen Paper 2 Insert.pdf
Past Exam Paper Scoring Guide	Cambridge IGCSE English - First Language (0500) Specimen Paper 2 Mark Scheme.pdf
Specimen Paper	Cambridge IGCSE English - First Language (0500) Specimen Paper 1.pdf Cambridge IGCSE English - First Language (0500) Specimen Paper 1 Insert.pdf
Specimen Paper Mark Scheme	Cambridge IGCSE English - First Language (0500) Specimen Paper 1 Mark Scheme.pdf
Examiner Report	Cambridge IGCSE English - First Language (0500) Examiner Report 2025.pdf
AS and A Level English Language (9093)	
Syllabus	Cambridge International AS and A Level English Language (9093) Syllabus.pdf
Learner Guide	Cambridge International AS and A Level English Language (9093) Learner Guide.pdf
Past Exam Paper	Cambridge International AS and A Level English Language (9093) June 2025 Question Paper 11.pdf
Past Exam Paper Scoring Guide	Cambridge International AS and A Level English Language (9093) June 2025 Question Paper 11 Mark Scheme.pdf
Specimen Paper	Cambridge International AS and A Level English Language (9093) Specimen Paper 4.pdf
Specimen Paper Mark Scheme	Cambridge International AS and A Level English Language (9093) Specimen Paper 4 Mark Scheme.pdf
Examiner Report	Cambridge International AS and A Level English Language (9093) June 2025 Examiner Report.pdf
AS and A Level Global Perspectives & Research	
Syllabus	Global Perspectives & Research AS & A Level Syllabus.pdf
Learner Guide	Global Perspectives & Research (9239) Learner Guide .pdf
Past Exam Paper	Global Perspectives & Research June-2025 Question Paper 11.pdf

Past Exam Paper Scoring Guide	Global Perspectives & Research June-2025 Question Paper 11 Mark Scheme.pdf
Specimen Paper	Global Perspectives and Research (9239) Specimen Paper 1.pdf Global Perspectives and Research (9239) Specimen Paper 1 Insert.pdf
Specimen Paper Mark Scheme	Global Perspectives and Research (9239) Specimen Paper 1 Mark Scheme.pdf
Examiner Report	Global Perspectives and Research (9239) June 2025 Examiner Report.pdf

The Cambridge Pathway

We offer a coherent curriculum for students aged 3 to 19 with clear progression at each stage. The Cambridge Pathway provides students with a deep content knowledge, conceptual understanding and higher order thinking skill development beginning as early as pre-K. Each program level focuses on developing the knowledge and skills necessary for success in the following program level. See Figure 1 for a summary and 'An International Education from Cambridge in Tab VII for a more detailed description of the program.

Figure 1. The Cambridge Pathway and Alignment to US Education System



Our Cambridge pathway has a clearly articulated framework for progression from one stage to the next, thereby ensuring a student's success as they progress throughout pre-K-12 and into post-secondary education.

Below we have provided a high-level overview of each of our program offerings should KCS wish to explore the benefits of a comprehensive adoption of the Cambridge Pathway, and further information can be provided, but the majority of this proposal will focus on the high school stages.

- **Cambridge Early Years** is a play-based program for 3 – 6-year-olds that focuses on key areas of early childhood development: physical development; language and communication development; cognitive development; and social and emotional development. There are six curriculum areas to guide and support progress across all areas of development: communication and literacy; creative expression; mathematics; physical development; personal and social development; and understanding the world.
- **Cambridge Primary** is for students in grades K – 5 (ages 5-11) and provides a strong foundation in the core content areas of English, mathematics, and science. Cambridge Primary also includes global perspectives, digital literacy, modern foreign language, music, and wellbeing. Baseline assessment through Cambridge Insight provides data to understand potential.
- **Cambridge Lower Secondary** is for middle school students in grades 6 through 8 (ages 11-14) offering the same subjects as Cambridge Primary. Lower Secondary subjects prepare students for the next step in their educational pathway, and some subjects, such as digital literacy and computing, can be paired as a half-year elective.

- **Cambridge Pre-Advanced (IGCSE)** is the world's most popular international curriculum for students aged 14 to 16 years (generally 9th and 10th graders in the U.S.) with over 70 subjects. Some U.S. schools consider the IGCSE program to fulfill high school graduation requirements for honors courses. It is recognized by universities and employers around the world as evidence of academic achievement. These courses are excellent preparation for advanced academics and provides the foundation students need to excel.
- **Cambridge Advanced** includes AS Levels, which are one-year courses, equivalent to a first semester college course, typically receiving 3-4 college credits. A Levels are two-year courses, equivalent to the first and second semesters of a college course, receiving 6-8 credits. Cambridge Advanced has over 50 subjects and can culminate in the AICE (Advanced International Certificate of Education) Diploma.

Alignment with Early Postsecondary Opportunities (EPSO)

To support KCS' immediate objectives, we propose initial implementation of two program levels, the IGCSE Upper Secondary and Cambridge Advanced AS and A Levels. We recommend that high schools offer IGCSEs to support students in preparation for the AS and A Level courses. Students who participate in an IGCSE course become accustomed to both the rigor and assessment practices of Cambridge and are better prepared for success at the AS and A Level. The high school stages of the Cambridge Pathway can explicitly support Tennessee's EPSO and Ready Graduate goals.

Cambridge International AS & A Level courses are officially recognized by the Tennessee Department of Education as approved Early Postsecondary Opportunities (EPSOs). This designation means that Cambridge courses directly contribute to a student's ability to meet the Ready Graduate criteria, which includes completing EPSO requirements.

Students can fulfill the Ready Graduate indicator by:

- Successfully completing four EPSOs, which may include multiple Cambridge AS and A Level exams.
- Completing two Cambridge EPSOs in combination with an approved industry certification.

Cambridge assessments serve as valid evidence of EPSO completion and are aligned with the Tennessee Ready Graduate framework.

College and Career Readiness (CCR) Impact

Cambridge's EPSO-recognized courses directly support KCS's Ready Graduate indicators and Career Empowerment priority. Cambridge programs are designed to prepare students for postsecondary success through:

- Rigorous academic coursework benchmarked to international standards.
- Skill development in critical thinking, communication, collaboration, digital literacy, and global awareness.
- Real-world applications such as independent research, portfolio development, and interdisciplinary projects.

Students who pass Cambridge AS or A Level exams may earn college credit or advanced standing at institutions across Tennessee, the U.S., and the globe, accelerating college pathways and reducing postsecondary costs. (More on college credit below.) This supports:

- Early graduation opportunities
- Access to scholarships
- Financial savings for families

Cambridge's emphasis on applying knowledge in unfamiliar contexts ensures students are not only academically prepared but also career-ready, aligning with Tennessee's CCR goals.

For more information:

- Tennessee EPSO Overview/Cambridge: https://www.tn.gov/education/students/early-postsecondary/cambridge-international.html
- Cambridge Recognition in the U.S.: https://www.tbr.edu/academics/early-postsecondary-opportunities

Career Readiness and Postsecondary Credit Potential

Cambridge International AS & A Levels are considered college-level courses of study. Consulting teachers and college faculty help define educator and student needs and contribute to syllabi, course assessments, and supporting material content. Consulting universities review and confirm that syllabi cover the concepts and skills necessary for university success. To ensure the program continues to align with the skills necessary to succeed at university, instruction and learning objectives are developed in consultation with faculty at leading universities (including Harvard University, Stanford University, and the University of Cambridge) and ongoing feedback is sought from the U.S. Higher Education Advisory Council. More than 30 AS & A Level exams are recommended for college credit for a grade of E or higher by the American Council on Education, with several exams receiving credit recommendations for both lower and upper division courses. The recommendations can be viewed through the ACE National Guide.

Over 1000 universities in the U.S. accept Cambridge International AS & A Levels for credit and/or placement, including all Ivy League colleges and the entire Tennessee University system and the University of North Carolina system. Tab VII includes documentation of university acceptance of Cambridge International qualifications, including Recognition Worldwide, Global Recognition Factsheet, AS A Level Guide for Universities, and IGCSE Guide for Universities.

Our recognitions database describes college credit policies for our qualifications at competitive colleges worldwide: http://recognition.cambridgeinternational.org/.

Development of Critical Thinking, Inquiry, Reasoning, and Communication Skills

Cognitive skills are those that require conscious intellectual effort, such as thinking, reasoning, or remembering. Noncognitive skills include motivation, attitudes, autonomy, and goal setting. Learning skills include time management, note-taking, and communicating arguments and explanations clearly and logically. These skills last

a lifetime and prepare students for their future lives. They also make learning enjoyable and rewarding. Educators often say this is what they should be teaching, but many do not know how. We acknowledge the essential nature of these skills and help educators teach them.

Teaching students to be effective, adaptive learners prepares them for university and careers. Students who demonstrate these effective learning strategies habitually approach academic tasks with a mindset of confidence, self-responsibility, reflectiveness, innovativeness and engagement. They employ a broad range of cognitive strategies and socio-emotional skills (including personal qualities such as resilience, self-motivation and self-regulation) to manage their performance effectively.

We design courses so that instructional tasks develop these skills and then design assessments to measure application of these skills. Researchers and scientists at Cambridge often conduct and publish research to better understand these skills and we disseminate findings about how best to teach and demonstrate them. Two features of the Cambridge program specifically target development of higher order thinking skills: The Cambridge Learner Attributes and the Global Perspectives and Research course.

The Cambridge Learner Attributes and Global Perspectives and Research

At the foundation of Cambridge programming are the Cambridge Learner Attributes, which support the development of learners who are confident, responsible, reflective, innovative, and engaged.

In 2006, University of Cambridge began a research program on critical thinking, creating a working definition to be applied to Cambridge program development and instruction, while identifying the challenges to teaching critical thinking, and documenting the benefits of critical thinking. As a result, in 2011, we developed a set of learner attributes describing the learning habits associated with success in school, college, the workplace, and life in general.

These attributes are explicitly developed in all subjects, activities, and assessments across the entire Cambridge Pathway. Cambridge syllabi and support material emphasize the learner attributes in subject-specific ways that complement their more general use across the curriculum. The attributes encompass what others have called competencies or 21st Century Skills and include problem-solving, critical thinking, and metacognition. They support the development of learning habits that will inspire students to become lifelong learners capable of leading economically productive, fulfilling lives. Students embodying the Cambridge learner attributes are:

- Confident in working with information and ideas – their own and those of others.
- Responsible for themselves, responsive to and respectful of others.
- Reflective as learners, developing their ability to learn.
- Innovative and equipped for new and future challenges.
- Engaged intellectually and socially, ready to make a difference.

We provide educators with training and guidance to develop these attributes in students. Developing the Cambridge Learner Attributes, describes how effective teaching practice using reflection and creativity nurtures student engagement, well-being, and learning to learn. The guide provides resources, co-curricular programs, and activities for teachers to use to teach these skills to their students. Cambridge Educational Briefs and Fact Sheets, such as Active Learning, Meta-cognition, and Assessment for Learning provide additional guidance for developing the learner attributes. All are provided in the electronic version of Tab VII; Fact Sheets samples in the print version.

Below in Course Offerings and Diploma Options, we go into detail to explain our Global Perspectives and Research (GP & R) course which was designed to ensure students are college-ready and supported in developing their thinking and learning skills. One of Cambridge's key goals is to teach students how to learn. We developed the Global Perspectives & Research (GP&R) course in response to concerns from universities over the college-readiness of students. Please reference this section including Table 4 for further detail.

Cross-Disciplinary Content Coverage

Like Knox County Schools, Cambridge is focused on developing "future-ready learners" who possess crucial life skills like critical thinking, communication, and adaptability, not just academic knowledge. Cambridge is also integrating AI tools and digital assessments to support educators and students in preparing for a rapidly changing world. Cambridge also supports Knox County Schools' mission to provide rigorous, relevant, and equitable learning experiences across all major content areas and disciplines, ensuring students are prepared for postsecondary success and career readiness.

Art and Creative Expression

Cambridge Art & Design encourages students to explore visual communication through a variety of media and techniques. The curriculum emphasizes creative inquiry, conceptual development, and reflective practice. Students analyze artistic traditions, develop portfolios, and present original work, building skills in visual literacy, design thinking, and creative problem-solving. Cambridge Digital Media & Design allows students to explore a range of processes and techniques in digital media through flexible course design covering digital photography, moving image, games design, and mobile and multimedia applications. Cambridge Drama encourages learners to develop their skills in performing, devising and researching a wide range of theatrical styles and genres.

Career and Technical Education (CTE)

Cambridge supports career readiness through Pre-Advanced and Advanced subjects aligned to the National Career Clusters Framework, including, but not limited to, Business, Computer Science, Travel & Tourism, Information & Communication Technology (ICT), Digital Media & Design, and Design & Technology. These courses integrate technical skills with entrepreneurial thinking, digital literacy, and project-based learning and can serve as introductory, intermediate, or capstone courses within a career pathway. Students gain exposure to industry-relevant tools and practices, preparing them for CTE pathways and industry certifications while also offering opportunities for college credit. Many of the associated certifications are categorized as Tier 2 or 3 on TN's Credentials of Value.

Language and Literacy (English and World Languages)

Cambridge English Language and Literature programs develop advanced reading, writing, speaking, and listening skills. Students engage with diverse texts, analyze language and structure, and produce coherent arguments and narratives. World Language offerings (e.g., Spanish, French, Mandarin) emphasize cultural competence, conversational fluency, and grammatical accuracy, preparing students for global communication and multilingual environments.

Mathematics

Cambridge Mathematics programs—from foundational levels to advanced coursework—emphasize logical reasoning, abstract thinking, and real-world application. Students develop fluency in algebra, geometry, statistics, and calculus, supported by inquiry-based instruction and performance tasks. The curriculum prepares students for STEM pathways and postsecondary coursework through rigorous content and problem-solving strategies.

Social Sciences

Cambridge Social Studies subjects—including Economics, European, International, and US History, Geography, Sociology, and Global Perspectives—promote analytical reasoning, source evaluation, and civic understanding. Students investigate historical events, interpret data, and engage in debates on contemporary issues. The Global Perspectives course fosters interdisciplinary inquiry and collaborative problem-solving on global challenges, aligning with Knox County's emphasis on civic literacy and global awareness.

Sciences

Cambridge Science programs including Biology, Chemistry, Physics, and Environmental Management emphasize scientific inquiry, experimental design, and data analysis. Students conduct hands-on investigations, interpret results, and apply scientific principles to real-world contexts. The curriculum supports STEM readiness and aligns with Tennessee science standards through rigorous content and lab-based learning.

Course Offerings and Diploma Options

Cambridge Pre-Advanced (IGCSE)

The Cambridge Pre-Advanced IGCSE curriculum includes over 70 subjects that may be offered and taken in any combination. Typically provided to students in their first two years of high school, IGCSE courses may be taken at two levels, Core and Extended (both requiring 130 guided learning hours). This allows teachers to adapt the course to students of a range of ability and include those whose first language is not English.

Cambridge IGCSE courses develop learners' knowledge, understanding, and skills in:

- Subject content
- Applying knowledge and understanding to new as well as unfamiliar situations
- Intellectual enquiry
- Flexibility and responsiveness to change
- Influencing outcomes
- Cultural awareness and communication.

Table 2 lists courses available at the IGCSE level by subject area. In addition to the core subjects of math, science, English, and social sciences, options include world languages, the creative arts, technology applications,

and career & technical interests. The full IGCSE course list and associated course documents are at: Cambridge IGCSE subjects.

Table 2. EXAMPLE IGCSE COURSES BY SUBJECT

Subject	Example Courses
Mathematics	Mathematics, Mathematics – Additional, Mathematics International
Science	Agriculture, Biology, Chemistry, Environmental Management, Marine Science, Physics, Science - Combined
English Language and Literature	English – Literature, English – First Language, World Literature, English as a Second Language
Languages	Spanish, Dutch, French, German, Arabic, Hindi, Chinese, Korean, Russian, Thai, Italian, Portuguese, Afrikaans
Humanities and Social Sciences	Developmental Studies, Economics, Geography, Global Perspectives, History, History – American, Sociology
The Arts	Art & Design, Drama, Music
Career & Technical Education	Accounting, Business, Computer Science, Design & Technology, Digital Literacy, Enterprise, Food & Nutrition, Information and Communication Technology, Physical Education, Travel & Tourism
The full IGCSE course list and associated course documents are at: Cambridge IGCSE subjects	

Some of the IGCSE courses provide transition guides to assist teachers in supporting students as they move from one level of Cambridge programming to the next.

Cambridge Advanced (AS and A Level)

Cambridge offers over 50 courses at the AS and A Level; AS Level is typically taught as a one-year course (180 guided learning hours) and A Level is typically a two-year course (360 guided learning hours). Students participating in Advanced Level courses can earn college credit if awarded a qualifying grade on the associated Cambridge assessments (see College Credit section for details). At this level, courses develop learners' knowledge, understanding and skills in:

- In-depth subject content
- Independent thinking
- Applying knowledge and understanding to new as well as familiar situations
- Handling and evaluating different types of information source
- Thinking logically and presenting ordered and coherent arguments
- Making judgements, recommendations and decisions
- Presenting reasoned explanations, understanding implications, and communicating them logically and clearly
- Working and communicating in English.

A Level courses are the most rigorous high school courses available in the U.S. and are designed to demonstrate sustained study in a subject. They may build upon material previously taught in AS coursework, however, the material taught within the A Level is new content with increased rigor and cognitive demand. Courses emphasize practical application of knowledge and skills. For example, the biology course requires that students in the course spend 20 percent of their time doing individual or small group practical work (not including observing practical demonstrations).

Table 3 lists courses available at the AS & A level by subject area. In addition to the core subjects of math, science, English language arts, and social sciences, options include multiple world languages, the arts, technology, career & technical interests. Career-focused students often take courses in design in the arts, travel and tourism, accounting, physical education, business, or environmental management.

Table 3. Example AS/A Level Courses by Subject

Subject	Example Courses
Mathematics	Mathematics, Mathematics – Further
Science	Biology, Chemistry, Environmental Management, Marine Science, Physics
English Language and Literature	Literature in English, English Language, English - Language & Literature, English General Paper
Languages	Spanish, French, German, Hindi, Chinese, Japanese, Portuguese, Afrikaans
Humanities and Social Sciences	Biblical Studies, Classical Studies, Economics, European History, Geography, Global Perspectives & Research, International History, Law, Psychology, Sociology, Thinking Skills, US History to 1877, US History since 1877, US Government & Politics (first teach fall 2027)
The Arts	Art & Design, Design & Technology, Digital Media & Design, Drama, Music
Career & Technical Education	Accounting, Business, Computer Science, Digital Literacy, Information Technology, Media Studies, Physical Education, Travel & Tourism
The full AS/A Level course list and associated course documents are at: Cambridge International AS & A Level	

The full AS & A Level course list and associated course documents are at: Cambridge International AS & A Level subjects.

Cambridge AICE Diploma

For students seeking a comprehensive academic experience, Cambridge offers the Advanced International Certificate of Education (AICE) Diploma, a full diploma pathway recognized by colleges and universities worldwide. The AICE Diploma requires students to complete a balanced program of study across three curriculum groups:

1. Group 1: Mathematics and Sciences
2. Group 2: Languages (English and World Languages)
3. Group 3: Arts and Humanities
4. Optional Group 4: Interdisciplinary and Skills-Based Subjects (e.g., Global Perspectives)

To receive an AICE Diploma, students must earn 7 credits. This can be achieved by passing 4-7 exams of any combination of AS (1 credit) and A Level (2 credits) to meet the total. Global Perspectives AS (1 credit) is required, and one exam must be from each of the three main subject groups: Math and Science, Languages, and Arts and Humanities. All other subjects are the student's choice. This structure ensures:

- Breadth and depth of academic knowledge
- Development of critical thinking and research skills
- Preparation for postsecondary education and global citizenship.

The AICE Diploma is eligible for college credit and advanced standing at many U.S. institutions, including those in Tennessee, and may qualify students for state-specific scholarship programs. This resource provides further

information regarding the AICE diploma: https://www.cambridgeinternational.org/programmes-and-qualifications/cambridge-advanced/cambridge-aice-diploma/

Cambridge Global Perspectives & Research Course

One of Cambridge's key goals is to teach students how to learn. We developed the Global Perspectives & Research (GP&R) course in response to concerns from universities over the college-readiness of students. The entire course is devoted to developing thinking and learning skills, including analysis and research, and the AS Level is foundational to earning the AICE diploma. GP&R does not address a body of knowledge but focuses on skill development while allowing teachers and students to practice these skills in individual areas of interest. Students practice skills by researching global issues (e.g., genetic engineering, climate change, standard of living, or urbanization) through multiple themes (e.g., ethics, technology, culture, politics, or the environment).

The course equips students with a firm grasp of core research, collaboration, presentation and higher-order thinking skills – skills students need to be successful at school, university and in their future careers (see Table 4.)

TABLE 4. ASSESSMENT OBJECTIVES: GLOBAL PERSPECTIVES AND RESEARCH

AO1: Research, analysis and evaluation
• analyze arguments to understand how they are structured and on what they are based • analyze perspectives and understand the different claims, reasons, arguments, views and evidence they contain • synthesize relevant and credible research in support of judgments about arguments and perspectives • critically evaluate the strengths, weaknesses and implications of reasoning in arguments and overall perspectives • critically evaluate the nature of different arguments and perspectives • use research to support judgements about arguments and perspectives • design and manage own research project using appropriate research methods and methodology (A) • select and analyze appropriate concepts, arguments, perspectives and evidence from a range of source material and use these in own research report (A) • evaluate specific research methods and methodology as used in own research report (A).
AO2: Reflection
• research and consider alternative perspectives objectively and with empathy • consider the ways in which personal standpoints may have been affected by the research process • evaluate the impact of alternative perspectives and conclusions on personal standpoint • identify the need for further research in light of the research findings • reflect on the scope, nature and limitations of own research report (A).
AO3: Communication and collaboration
• work effectively in a group to identify an appropriate local problem with global relevance and consider a range of possible solutions (AS) • select and present relevant information in an engaging, coherent and well-structured way to a non-specialist audience (AS) • present complex global concepts, perspectives and arguments effectively using multimedia (audio and/or visual) appropriate to the presentation (AS) • use appropriate technical terms and cited references effectively • provide an oral explanation and justification of own report findings, choice and use of research methods and methodology (A).
Note. (AS) identifies objectives for AS Level (one-year) courses only; (A) identifies objectives for A Level (two-year) courses only.

Tab VII includes the GP&R AS/A level course syllabus, Learner Guide, and a past exam paper and mark scheme from 2018. We provide additional course documents for GP&R on the course website at: https://www.cambridgeinternational.org/programmes-and-qualifications/cambridge-international-as-and-a-level-global-perspectives-and-research-9239/.

Assessment Model

Cambridge course assessments are designed to assess students' ability to demonstrate understanding as well as manipulate and apply the content and skills that are taught in the course rather than solely assess a comprehensive set of content-specific facts, vocabularies, and processes. They are designed to measure the higher order skills required to engage and interact with the content, and not just the content itself. Assessments incorporate multiple measures, and several different types of measures, each of which is appropriate to eliciting different cognitive processes. They are 80-90 percent constructed response (100 percent in the humanities) and require students to integrate critical thinking skills with knowledge to solve new problems.

Course performance is based upon an aggregate score from multiple assessments of different types, called assessment components or test papers. Each component measures one or more assessment objectives, which specify the interactions between content and skill required of students after completing the course. Test papers consist of related sets of multiple item types, including objective-response, multiple choice, short-answer, extended response or practical works such as projects, journals, labs, portfolios, experiments, or presentations.

Objective-response items require a highly defined response, such as adding a line to a diagram, completing a number sequence, or completing a statement. Multiple-choice items require selection of the best of a set of given alternatives to complete a statement or answer a question. Short-answer items require succinct responses to specific questions, where the marking scheme allows some variation in those responses. Extended-response items require multiple steps and the creation of written text and/or task completion and allow candidates to organize their responses and present material in an original way.

Every course is assessed by multiple test papers containing multiple types of items that require different kinds of responses because mastery cannot be measured by a single timed examination alone.

Components may be of two types: moderated or examined. Moderated coursework consists of student work like essays, projects, presentations and language speaking tests that are scored at their school and then moderated by Cambridge. Examined coursework is not scored at the school, just externally scored by experienced Cambridge remote examiners.

Student Identification and Equity in Advanced Coursework

Knox County Schools is committed to preparing every student for life through a high-quality education that is accessible, meaningful, and future-focused. The district's 2030 Strategic Plan emphasizes Excellence in Foundational Skills, Success for Every Student, and Career Empowerment and Preparation – all of which align seamlessly with the Cambridge program's early identification and access strategies.

The Cambridge program supports these goals by identifying student potential early – well before high school – and providing actionable insights that help educators personalize instruction and expand opportunity. This is especially critical in KCS, where the district is working to strengthen academic interventions, streamline whole child support, and ensure equitable access to advanced learning pathways.

Program Flexibility and Accessibility

This flexibility supports KCS's Success for Every Student priority by ensuring advanced academic opportunities are accessible to all learners, including ELLs and students with disabilities. Within each stage of the Pathway, we help schools develop a curriculum that suits their context, culture, and ethos. Schools can tailor to their students' needs. Teachers are provided a clear structure, standards, resources, and training, but given the flexibility to be creative professionals; effective learning and teaching can encompass a variety of approaches and should

recognize cultural and community influences. This flexibility gives our program the ability to reach students from a variety of backgrounds across a range of ability levels. For high-achieving students, it can challenge them by offering some of the most rigorous college-level coursework available in the U.S. and for those that need more scaffolding, including English Language Learners, it can provide the needed foundation to succeed.

While each program level focuses on developing the knowledge and skills necessary for success in the following program level, any level can be implemented within a school. The Cambridge program can be taken as individual courses, like AP, or as an integrated advanced diploma program, like IB. This flexibility makes the Cambridge Pathway accessible to more students and schools than similar programs. It can also be offered alongside other programs in the same school to provide opportunities to more students.

Because the Cambridge assessment model allows multiple opportunities for students to demonstrate knowledge and skills, with different assessment components tested across different days, underserved students often find more success. In addition to multiple choice, short answer, and extended essay question types, many courses require students to demonstrate knowledge and skills through projects, practicals, demonstrations, or coursework. Students who may struggle with more traditional test types given in a single high-pressure sitting can show what they know with active, hands-on learning.

The skills taught in the Cambridge Pathway are equally relevant to students regardless of postsecondary aspiration. The Learner Attributes and skills taught in each course are associated with not only academic achievement, but also with career success. Employers value these skills in their employees as much as college faculty value them in their students. This may be a unique benefit of the Cambridge program to KCS, where although 93 percent of KCS students graduate in four years and 69.4 percent enroll in postsecondary institutions the fall after graduation, the postsecondary enrollment rates are lower for Black, Hispanic, Native American, and economically disadvantaged students, as well as English Learners, and students with disabilities. Cambridge can provide increased access for students who do not usually have access to advanced curriculum and can help KCS teachers engage and prepare these students.

Cambridge Insight Baseline Assessments

Cambridge Insights are curriculum-independent assessments built on data from over 650,000 learners annually. These tools help KCS educators:

- Identify student potential and learning needs
- Predict future academic performance
- Provide actionable insights for personalized instruction

Equitable Access and Strategic Impact

Cambridge's approach aligns with KCS's commitment to Success for Every Student by:

- Providing a holistic view of learners: Uncovering hidden potential beyond traditional academic metrics
- Enabling early intervention: Identifying learning gaps at the start of each stage
- Driving data-informed equity: Using disaggregated data to adjust instruction and resources
- Reducing pressure: Offering low-stakes, formative assessments that inform teaching without labeling students prematurely

Empower Strategic Decision-Making

Cambridge Insight assessments generate high-quality data and predictive analytics that empower educators to:

- Make informed decisions about curriculum and instruction
- Target interventions effectively
- Monitor progress toward district goals, including third grade reading and eighth grade math proficiency

By integrating these digital assessments at key transition points – such as the start or end of elementary and middle school and the start of high school KCS can proactively support students and ensure readiness for advanced coursework, including Cambridge IGCSE and A level programs.

Specific Tools for Early Identification

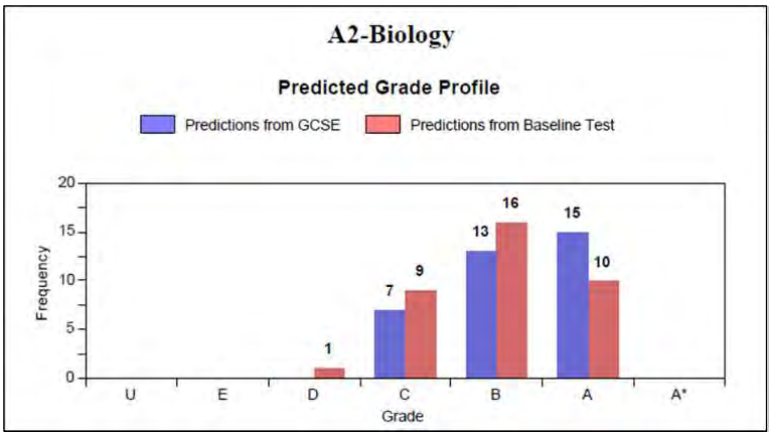


- Cambridge Early Years Check Together: Assesses developmental progress and readiness
- Cambridge Primary Insight (ages 5-11): Measures reading, math, spelling, and developed ability
- Cambridge MidYIS Insight (ages 11-14): Identifies current skills, potential, and learning needs of Lower Secondary students. Predicts IGCSE potential exam performance.
- Cambridge Yellis Insight (ages 14-16): Identifies current skills, potential, and learning needs of Pre-Advanced students. Predicts IGCSE potential exam performance.
- Cambridge Advanced Insight (ages 16+): Identifies current skills, potential, and learning needs of Lower Secondary students. Predicts AS/A potential exam performance.

These tools complement KCS's efforts to define the unique role of each grade band in preparing students for life after graduation and to strengthen academic interventions across the district.

With KCS's interest in early identification of student potential, the Cambridge Yellis (14-16) could be administered at the end of 8th grade or start of 9th grade to predict future performance on individual IGCSE subjects, with detailed analysis of individual strengths and weaknesses to help structure a course of action. Cambridge ALIS (16-19) could be similarly used at the conclusion of 9th grade to identify students likely to succeed in Advanced Level subjects. Teachers can access both cohort-level and individual student predictions.

With ALIS, there is an additional "Chances" report that shows either the cohort's or student's likelihood of achieving a particular grade, which can be used to determine the level of support needed for the class as a whole or the individual student.



More information about these diagnostic assessments can be found at Insight assessments

Cambridge Checkpoint Assessments

Schools can utilize Cambridge's Lower Secondary Checkpoint test, which can provide a benchmark of learner performance and provide diagnostic feedback. It assesses skills, knowledge, and understanding at the end of the 8th grade and may identify gaps in knowledge or opportunity for some students (additional information can be found at https://www.cambridgeinternational.org/programmes-and-qualifications/cambridge-lower-secondary/assessment/cambridge-checkpoint/.)

Professional Development and Staff Support

Cambridge's PD offerings align with KCS's commitment to Great Educators in Every School, providing scalable, research-based training for teachers and leaders. Cambridge provides a comprehensive and sustainable professional development model that supports school and district staff at every stage of implementation. Our training offerings include in-person workshops, virtual sessions, and on-demand video resources. These are complemented by robust teacher support materials—including syllabi, teaching guides, lesson plans, and assessment tools—that ensure educators are fully equipped to deliver rigorous instruction. Administrators, teachers, and exam officers all receive targeted support, and new schools benefit from structured onboarding resources and implementation guidance. The following section outlines the specific tools and services available to Knox County Schools.

Professional Development Offerings

Understanding that teacher support is crucial to student success, Cambridge has a wide variety of wraparound services to ensure administrators, staff, teachers, and students are fully supported in their implementation and navigation of any aspect of The Cambridge Pathway. Table 5 describes how Cambridge supports schools, teachers and students.

TABLE 5. CAMBRIDGE RESOURCES AND SUPPORTS FOR STUDENTS, PARENTS, TEACHERS, ADMINISTRATORS, AND EXAMS OFFICERS

Resource	Description	Audience				
		S	P	E	AL	EO

Program & Implementation Resources						
Cambridge Handbook	Core program document; contains all information necessary to meet regulations and manage an exam series.			x	x	x
Implementing the curriculum with Cambridge: A Guide for School Leaders	Provides empirically based practical advice on designing, developing, implementing and evaluating effective curriculum.				x	
Developing your school with Cambridge: A Guide for School Leaders	Focuses on classroom-level development, policy, and activity; provides guidance on improving the quality of teaching and learning in a school.				x	
Developing the Cambridge Learner Attributes	Book-length document describes the learning habits empirically associated with success in school, career, and life, and provides practical guidance on nurturing and developing these attributes in students.			x	x	
Communications Toolkit	Online resource for schools implementing Cambridge, includes printable posters, press release templates, event banners, logos and flags.	x	x		x	
Factsheets and Guides	Sets of brochures, videos and guides for parents and families describing the Cambridge programs and levels, provided in multiple languages addressing multiple topics.		x			
School Evaluation Domains and Standards	A framework for reviewing school performance and identifying strengths and weaknesses.				x	
Cambridge Outlook	Cambridge school magazine published 3x year and distributed to all Cambridge schools.			x	x	x
Instructional & Course Resources						
Syllabus	Core course document; describes content knowledge and skills to be taught, learned, and assessed in the course.	x		x		
Teacher Guides	Teacher guide for planning and organizing each course, includes teaching strategies.			x		
Learner Guides	Student guide for each course, includes sample assessment items and examiner annotations. The GP&R guide is online and interactive.	x				
Learner Revision Guides	Student guide to planning assessment responses, including good revision techniques.	x				
Schemes of Work	Provide sequence, classroom activities, learning resources, past exams, and advice for lesson planning.			x		
Coursework Handbook	Guidance on planning, administering, delivering and marking coursework components. Some include an online self-study component.			x		
Past Test Papers	Illustrate exam requirements and scoring standards.	x	x	x	x	
Mark Schemes	Document how student responses to each question do or do not meet each assessment objective.	x		x		
Specimen Papers	Exemplify the overall assessment model and approaches to various papers or components; include high-standard example responses.	x		x		
Example Candidate Responses	Show what different levels of performance look like on real assessments; include real responses, examiner comments, identify common mistakes and list ways to improve responses.	x		x		
*Resource Plus	Online collection of teaching and learning resources for popular courses and specific topics within those courses; includes lesson plans, teaching materials and classroom activities.			x		
Online Forums	Forum for teachers to communicate with each other to share questions, tips, challenges and resources.			x		
*TestMaker	Online subscription tool that lets teachers build formative and practice assessments from previous test questions.					
Leadership and Teacher Development Resources						

Cambridge School Leader and Teacher Standards	Key characteristics and practices that are shown by effective school leaders and teachers.			x	x	
Education briefs	Provide a close look at important themes in education, including active learning, bilingual education and assessment for learning.			x	x	
Getting started with…	Guides that build on education briefs to introduce and develop areas of teaching and learning practice and provide new ideas and approaches that link theoretical understanding with practical classroom application.			x	x	
Principle Examiner Reports	Describe student performance trends on every assessment for every course, includes key issues, common misunderstandings or strengths, examples of strong and weak responses, and describes patterns over time.			x		
*Endorsed Resources	Compilation of external resources developed by multiple providers for a specific Cambridge course; reviewed and endorsed by Cambridge. Review, endorsement, and compilation is provided at no cost but endorsed materials must be purchased from their source. Cambridge is unique among advanced academic providers for having its own publishing house, Cambridge University Press.			x		
*PD & Training	Self-paced courses and in-person or on-site workshops that introduce the Cambridge program and courses, engage teachers with the curriculum, and transform practice and learning. Some self-paced modules are free, most have a cost.		x	x	x	x
*PD Qualifications	Awards, Certificates and Diploma programs in Teaching and Learning, Teaching Bilingual Learners, Teaching with Digital Technologies and Education Leadership.			x	x	
Exam Officer Training & Support Resources						
Exams Officer's Guide	Provides details, forms, checklists and additional resources for successfully completing all steps related to ordering, receiving, administering, moderating, and shipping assessments.			x		x
Invigilating Cambridge Exams	Online webinars, video tutorials and self-paced modules for new and experienced exam officers; include topics such as 'Welcome to being a Cambridge Exams Officer' and 'How to' webinars, 'Just in time' learning video tutorials, self-study modules on the Cambridge exams cycle, and Cambridge Exams Cycle videos.			x		x
Cambridge Guide to Making Entries	Guide and video for entering students for exams.					x
CIE Direct	Online tool to make exam entries, order tests, submit internally assessed marks and forecast grades, and download results.					x
Cambridge Exams Officer eNewsletter	Monthly news and reminders for all aspects of Cambridge assessment.					x
Note: Audiences include students (S), parents and families (P), educators (E), school leaders and administrators (AL) and exam officers (EO). Resources listed are provided by Cambridge at no cost to support instruction and learning. Resources described are provided to all registered schools at no cost. Exceptions are noted by an asterisk; these are optional resources that are available at additional cost.						

Implementing the curriculum with Cambridge: A Guide for School Leaders provides practical advice on designing, developing, implementing and evaluating effective curriculum.

Developing your school with Cambridge: A Guide for School Leaders focuses on classroom-level development, policy, and activity; providing guidance on improving the quality of teaching and learning in a school.

Developing the Cambridge learner attributes describes the learning habits empirically associated with success in school, career, and life, and provides practical guidance on nurturing and developing these attributes in students.

Education briefs provide a close look at important themes in education, including active learning, bilingual education and assessment for learning.

Getting started with... guides build on our education briefs to introduce and develop areas of teaching and learning practice and provide new ideas and approaches that link theoretical understanding with practical classroom application.



All resources are available from (https://www.cambridgeinternational.org/support-and-training-for-schools/support-for-new-schools/) and are included in Tab VII (please note we are providing samples for the committee's reference and further resources are available upon request). This webpage also provides links to information on each stage of the Cambridge Pathway, the Global Perspectives course, learner and teacher attributes, teacher support and professional development, other webpages containing support materials for teachers, leaders, or exams officers, employer and university recognition, and links to online teaching and learning communities.

New schools also find our Communications Toolkit resources helpful (see Figure 2 and Communications toolkit for approved Cambridge schools)

FIGURE 2. COMMUNICATIONS TOOLKIT



The Toolkit is a resource for schools to help stakeholders understand the Cambridge program; it includes Factsheets and Parent Guides (in eight different languages), presentations for parents and students, posters and banners, logos, videos that can be shown to parent or community groups, and press release templates.

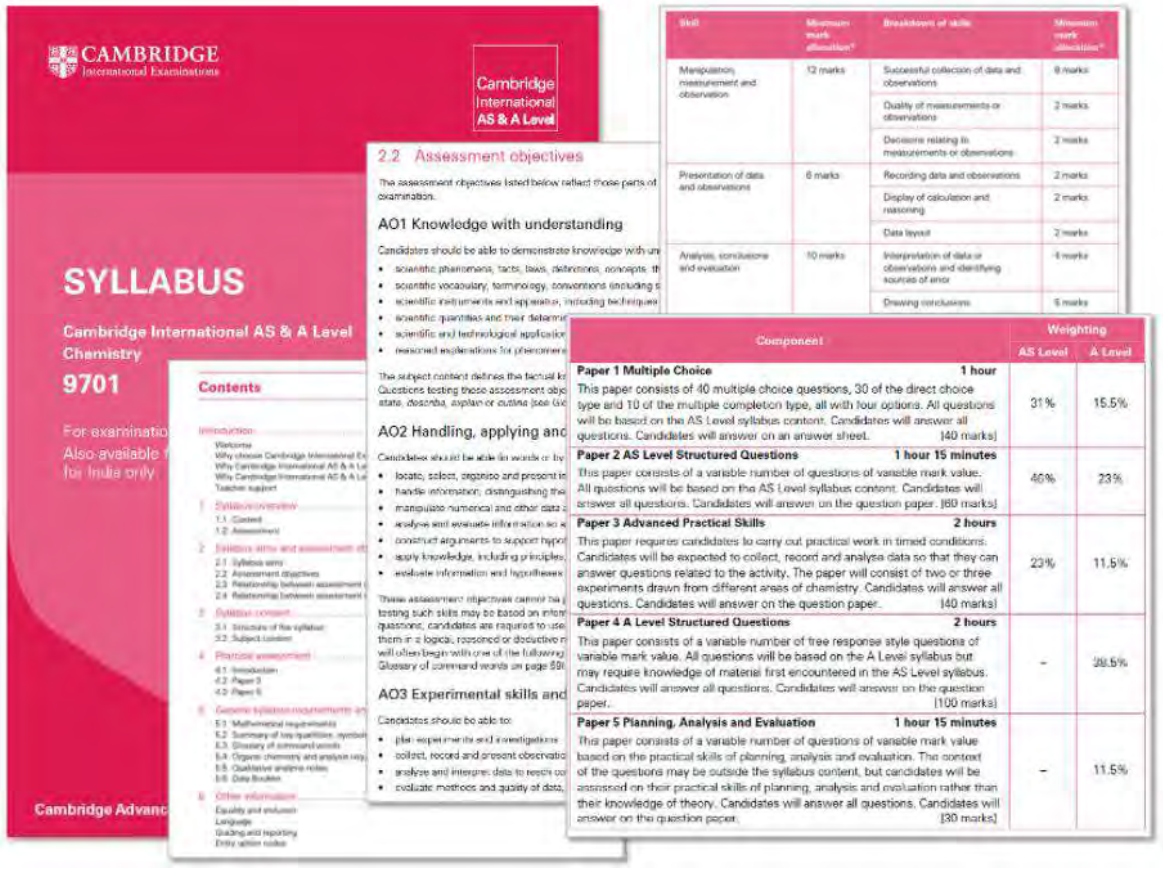
The parent guides included in Tab VII are from the toolkit, as is an example presentation for parents: *Cambridge Advanced – an Introduction for Parents*.

Teacher Support is Essential

We provide substantial support for schools and teachers during implementation and instruction; schools and teachers don't have to look for, develop, or purchase additional materials in order to confidently implement Cambridge courses. Key curriculum course, and instructional resources are available, including course syllabi, teaching guides, student guides, past exam papers and scoring rubrics (referred to as "mark schemes" in the U.K.), specimen papers and scoring rubrics, and lesson plans (often referred to as a "scheme of work").

The Syllabus is the core document for every Cambridge course. Quite detailed, they generally run over 100 pages in length and describe the content and skills taught in each course, the assessment objectives and scheme of assessment, the exams and coursework components, the mark schemes and grading expectations, and provide related information such as formula sheets and command words. See Figure 3 for sample elements of a Cambridge course syllabus.

Figure 3. Key elements of a Cambridge course syllabus



In addition to the syllabus, each course page provides other materials that teachers and students need for the course, including updates to course content or assessments, student Learner Guides, past exam papers with mark schemes and student exemplars, guides to teaching practical assessment components, examiner reports for past assessments, and links to additional endorsed resources that may be purchased but are not necessary for successfully taking or teaching the course. While textbooks are available to support delivery of each Cambridge subject, no additional materials must be purchased by educators or students.

Proposed Approach and Instructional Materials

KCS employs over 4,300 highly qualified teachers, commendably retaining 92% from year-to-year.[3] This proposal directly supports KCS's Strategic Plan 2030, particularly its goals for foundational skill development, equitable access, and career readiness. An overwhelming body of research supports this by finding that the most important factor in improving student outcomes is good teaching. An important part of our mission, therefore, is to support teaching.

Our support extends well beyond implementing, administering, and expanding our program. We offer a variety of materials to guide Knox County educators as they explore different aspects of teaching practice, from curriculum design to improving classroom activities. Many of these were described previously and are listed in Table 5, and we expand on a couple below.

Cambridge Teacher Attributes

Teachers themselves need to exemplify the attributes in everything they do; teachers are learners, which is why the Cambridge Learner Attributes are the same for teachers and learners. Because teachers who develop the Cambridge attributes in themselves may best be able to nurture them in students, our frameworks, practices, support materials, and professional development all support confidence, responsibility, reflection, innovation and engagement.

Developing Cambridge Learner Attributes describes how educators can improve their teaching practice through development of the attributes.

The Cambridge Teacher Standards and the Cambridge School Leader Standards.

Understanding what 'good teaching' and 'good leadership' look like in practice and how practitioners can improve are central to the ongoing improvement of all Cambridge learners. We reviewed and compiled international research on effective teaching and school leadership and identified a set of core practices that are common to the best teachers and school leaders around the world. The *Cambridge Teacher Standards* and the *Cambridge School Leader Standards* describe these practices and are included in Tab VII and available at: https://www.cambridgeinternational.org/support-and-training-for-schools/professional-development-qualifications/school-leader-teacher-standards/.

Professional Development

We believe that supporting teachers in their professional development leads to improved outcomes for learners. Good quality professional development and reflective practice are essential parts of a teacher's professional life. We offer a range of different professional development opportunities for teachers at all stages of their professional journey, so teachers can find something that meets their needs. Courses are available in three different formats: in-person, virtual, and online training.

What a Cambridge Classroom Looks Like is a course introducing four key approaches, which are foundations of a Cambridge classroom: active learning, assessment for learning, metacognition, and inclusion. Participants explore what these approaches look like in practice and start building a practical toolkit of strategies. This course is available in-person and virtually.

Introduction courses are for teachers who are new to Cambridge or to a specific syllabus or program. Teachers who participate in Introduction courses generally move on to additional professional development courses. These courses are available in all three formats.

Focus on Teaching courses are for teachers who want to explore a specific area of teaching and learning within a syllabus or program, while Focus on Assessment courses are for teachers who want to understand the assessment of a syllabus in greater depth. Syllabus-specific marking and coursework marking workshops help teachers build their confidence in assessing students' work. Improving Speaking Performance courses help language teachers to improve their speaking lessons and understand how to better support their students.

Enrichment Professional Development is perfect for teachers and school leaders who want to transform their approach to teaching. Cambridge designs Enrichment courses to be dynamic and engaging. Experienced trainers encourage teachers and leaders to reflect on their professional practice and help them to develop practical strategies they can use in their schools. All Enrichment courses are designed to complement the syllabus-specific Introduction, Focus on Teaching, and Focus on Assessment courses. Participants are also encouraged to share ideas and learn from other members of the Cambridge International community. Each course focuses on a specific skill or concept in teaching and learning. For example:

- Active Learning and Assessment for Learning
- Metacognition: Boosting Students' Learning
- Effective Talk and Questioning

• Responsive Education for All Learners

Cambridge professional development is sustainable because it provides opportunities for teachers to learn and grow in their field and become better teachers.

Table 6 describes two example PD courses that are available to KCS teachers and school leaders. The full calendar of training and events is at: https://www.cambridgeinternational.org/support-and-training-for-schools/training/events-and-training-calendar/.

TABLE 6. EXAMPLE PROFESSIONAL DEVELOPMENT COURSE DESCRIPTIONS

Getting started with Metacognition – Enrichment, Online, Tutor-guided
This course is designed to develop participants' understanding of and how to apply Metacognition in teaching practice. This course encourages teachers to reflect on, and take greater responsibility for, their teaching as well as become more innovative in their classroom practice. Teachers should expect to spend 3 - 5 hours a week on the course. Weeks 3 and 4 will involve putting what has been learned into practice and reflecting upon the outcome. It is important that you have access to learners during these weeks. Successful completion of the course is based on participation in collaborative activities with teachers from around the world. The discussions and activities each week are in groups. We recommend that teachers access the course every day. A certificate is awarded to participants who complete key weekly activities and participate fully in discussions throughout the course.
Active Learning and Assessment for Learning– Enrichment, in-person
This course is designed to introduce the key principles and practices in Active Learning and Assessment for Learning and is meant for teachers who want to develop their classroom practice and would like an introduction to these approaches. In this course, participants will explore how to embed Active Learning and Assessment for Learning into their classroom practice. Under the guidance of an experienced trainer, participants will explore the following key questions: • What is Active Learning? • What is Assessment for Learning? • How do Active Learning and Assessment for Learning raise student achievement? • What practical Active Learning and Assessment for Learning tasks can you apply in your school context?

Cambridge also offers professional development certificate and diploma courses in four areas of specialization:

- Teaching and Learning
- Educational Leadership
- Teaching Bilingual Learners
- Teaching with Digital Technologies

Each specialization consists of three modules. Certificates require completion of an orientation module familiarizing them with key principals comprising 120 learning hours; diplomas require completion of an additional two 120-hour modules, one focused on exploration and reflective practice and the other focused on integration and engagement. Throughout each course, teacher candidates build portfolios containing evidence of practice, reflection, and learning which are then scored using objective assessment criteria by Cambridge PD examiners. Evaluation of each module is based on submitted written evidence (2400- 3600-words), observations, and the portfolio describing evidence of practice, learning and reflection.

Course content, learning objectives, and assessment tasks are described in the syllabi for each of the four specializations, available in the electronic version of Tab VII:

- *PD Teaching and Learning Syllabus 2020-2022.pdf*
- *PD Education Leadership Syllabus 2020-2022.pdf*
- *PD Teaching Bilingual Learners Syllabus 2020-2022.pdf*
- *PD Teaching with Digital Technologies Syllabus 2020-2022.pdf*

More information on these qualifications is available at: https://www.cambridgeinternational.org/support-and-training-for-schools/professional-development-qualifications/.

The theory behind and approach to our professional development is described by the education brief, *Professional Development.* Schools receive the *Professional Development Qualifications A Guide for School Leaders* that specify development options and provides practical guidance for establishing professional development qualifications in a school. Both documents are provided in electronic version of Tab VII.

Support for School Leaders

Principal preparation and leadership are integral to KCS' strategic plan; an average of 11 openings per year are filled by non-experienced candidates and more principals in Knox County apply to leadership programs than there are slots for them in the program (Sattler, 2017).[5] Cambridge International recognizes the importance of school leaders in the development of excellence in schools and can help KCS with leadership preparation and growth.

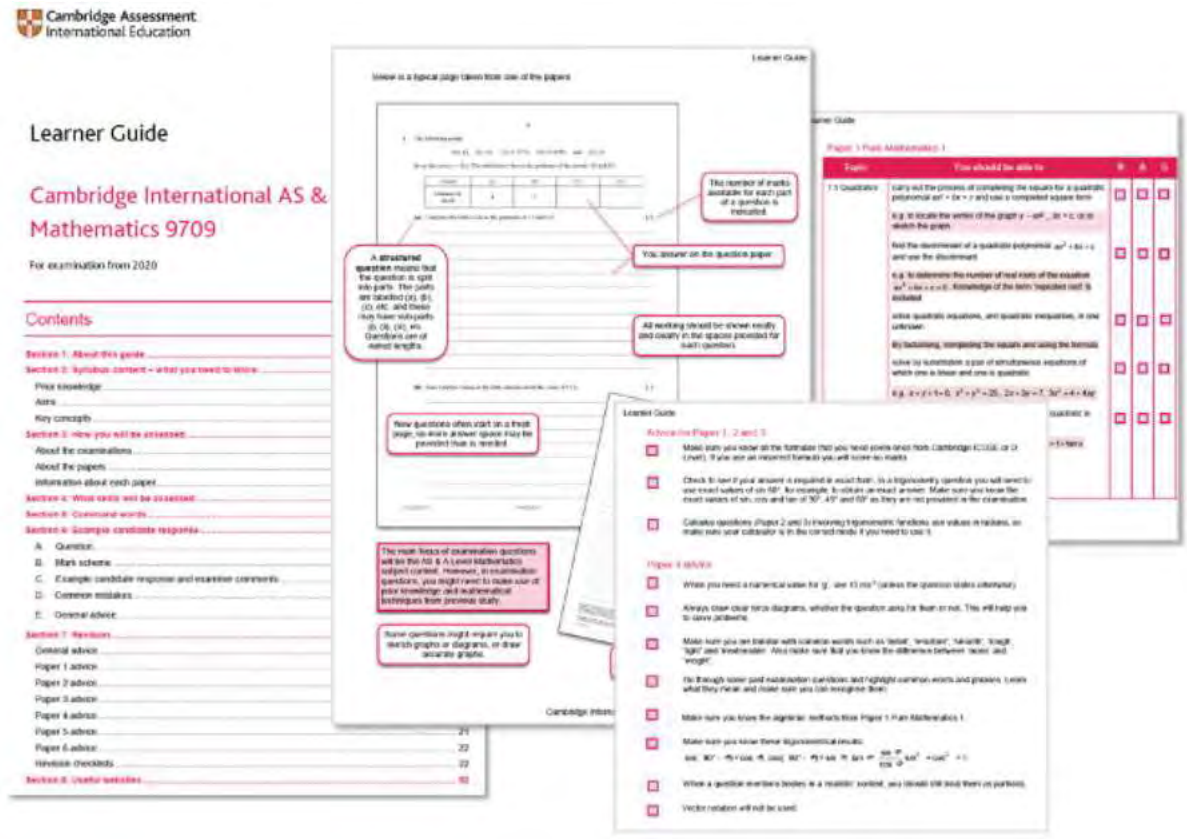
We offer four-day in-person and online enrichment workshops to help school leaders evaluate and develop their skills and the Cambridge International Certificate in Educational Leadership and the Cambridge International Diploma in Educational Leadership offers an additional avenue for KCS' 250 principals and administrators to develop their skills and practice. The programs are easily scalable to match future growth in administrator positions and enhance the existing leadership pipeline in KCS. The *Professional Development: Educational Leadership syllabus* for Cambridge's Certificate and Diploma in Educational Leadership describes the content and scope of the program (included in Tab VII). Leaders not currently in the pipeline can also use the *Cambridge School Leader Standards* to self-evaluate and improve leadership skills.

Resources for Learners

Cambridge's multilingual parent guides and learner resources support KCS's Communication and Engagement priority by fostering transparency and family involvement. Well-supported learners are empowered to take responsibility for their learning. In addition to course syllabi, Learner Guides help students understand the content and expectations for each IGCSE and AS & A Level course and assessment. They describe the key content, and learning aims of the course; details the assessment objectives, methods, weighting and mark schemes; and provides past test questions with example student responses, scorer annotations, mark scheme application, common mistakes, and both question- and test-specific advice. They also guide self-reflection guidance, outline revision skills, and provide relevant learner techniques and checklists. Figure 4 portrays some of these elements using an example Learner Guide from the AS & A Level Mathematics course.

As students learn about, practice, and cultivate the Cambridge Learner Attributes, they become more effective, adaptive learners; they develop skills that not only prepare them for university and careers but also help them perform better on other academic indicators and assessments. Students who demonstrate these effective learning strategies habitually approach academic tasks with a mindset of confidence, self-responsibility, reflectiveness, innovativeness and engagement. They employ a broad range of cognitive strategies and socio-emotional skills (including personal qualities such as resilience, self-motivation and self-regulation) to manage their performance effectively.

FIGURE 4. ELEMENTS OF A CAMBRIDGE LEARNER GUIDE



Students also use past papers and mark schemes to become familiar with the assessment structure, kinds of questions, and expected responses.

Linking Skills and Course Knowledge

Found in every course syllabus, Assessment Objects (AO) explicitly link the content knowledge with the higher-order thinking skills necessary to interact with content knowledge. For example, of the three AS & A Level Biology AO provided in Table 7, the first focuses on knowing and understanding biology-specific terminology, facts, processes, tools, conventions, and phenomena. This is the subject-specific knowledge measured most often by biology assessments. The second AO focuses on a range of skills necessary for students to interact with knowledge, specifically, how to apply, explain, and evaluate subject-specific knowledge. These are the skills often measured by a subset of open-response items on biology exams. The third AO extends the interaction between knowledge and skills to new situations and problems. Not often measured by large-scale assessments, these require practical application to demonstrate.

TABLE 7. AS & A LEVEL BIOLOGY ASSESSMENT OBJECTIVES (AO)

AO1 Knowledge and understanding	AO2 Handling, applying and evaluating information	AO3 Experimental skills and investigations
Candidates should be able to demonstrate knowledge and understanding of:	Candidates should be able to handle, apply and evaluate information, in words or using other forms of presentation (e.g. symbols, graphical or numerical) to:	Candidates should be able to:
• scientific phenomena, facts, laws, definitions, concepts and theories	• locate, select, organize and present information from a variety of sources	• plan experiments and investigations

• scientific vocabulary, terminology and conventions (including symbols, quantities and units) • scientific instruments and apparatus, including techniques of operation and aspects of safety • scientific quantities and their determination • scientific and technological applications with their social, economic and environmental implications	• translate information from one form to another • manipulate numerical and other data • use information to identify patterns, report trends and draw conclusions • give reasoned explanations for phenomena, patterns and relationships • make predictions and construct arguments to support hypotheses • apply knowledge, including principles, to new situations • evaluate information and hypotheses • demonstrate an awareness of the limitations of biological theories and models • solve problems.	• collect, record and present observations, measurements and estimates • analyze and interpret experimental data to reach conclusions • evaluate methods and quality of experimental data and suggest possible improvements to experiments.

Multiple Measures, Multiple Methods

Following best assessment practice, Cambridge assessment models incorporate multiple measures using multiple methods. This provides students with multiple ways and opportunities to demonstrate their knowledge and skills and show what they know and can do. We continue the example of AS & A Level Biology to illustrate how Cambridge uses different modes and opportunities to measure the knowledge and higher-order skills identified as Assessment Objectives. Measuring the knowledge and skills taught in this course requires five assessment components. Each component is referred to as a 'paper', as described in Table 8.

TABLE 8. AS & A LEVEL BIOLOGY ASSESSMENT COMPONENTS

Assessment Component					
	Paper 1	**Paper 2**	**Paper 3**	**Paper 4**	**Paper 5**
Description	MC	AS Level Structured Questions	Advanced Practical Skills	A Level Structured Questions	Planning, Analysis and Evaluation
Type	Exam	SA & ER	Lab-based practical work, 2-3 SA and ER	SA & ER	Practical assessment, 2 or more ER
AO Weighting (AO1/AO2/AO3)	50/50/0	50/50/0	0/0/100	50/50/0	0/0/100
Points/Marks	40	60	40	100	30
Percent of AS Level Grade	31%	46%	23%	-	-
Percent of A Level Grade	15.5%	23%	11.5%	38.5%	11.5%
Time	75 mins.	75 mins.	120 mins.	120 mins.	75 mins.
Scoring	Externally	Externally	Externally	Externally	Externally

Note. Test type abbreviations: multiple choice (MC), short answer (SA), extended response (ER).

The papers assessing the first and second AOs are most typical of standardized advanced course assessments, with the notable exception that only the first paper uses any multiple-choice test items. This is important because constructed-response type items are more valid means of measuring complex skills, performances, and reasoning,

the skills KCS is most interested in. The assessments of the third and fifth AO are both practical in nature. Table 9 provides an example of some of the individual skills measured on the Biology Paper 3 and includes example expectations for one of each of the three types of skills. These assessed skills are higher order, such as designing and creating original work, evaluating data, decisions, and process, and analyzing observations, errors, and patterns.

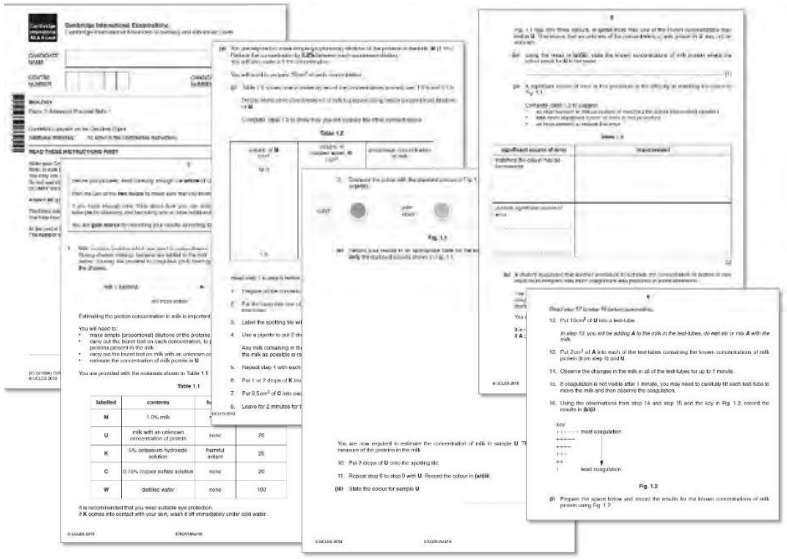
TABLE 9. EXPECTED SKILLS AND EXAMPLE EXPECTATIONS FOR BIOLOGY ADVANCED PRACTICAL SKILLS PAPER 3

Expected skills (with example expectations for selected skills)
Manipulation, measurement and observation • Decisions relating to measurements and observations • Collection of data and observations
Example expectations for "Decisions relating to measurements and observations" skill. *Within an investigation, candidates should be able to:* • *identify the independent variable and dependent variable* • *decide a suitable range of values to use for the independent variable at which measurements of the dependent variable are recorded* • *decide the number of different values of the independent variable (a minimum of five) and the intervals between them* • *decide how to change the value of the independent variable* • *decide how the dependent variable should be measured* • *decide the number of replicates at each value* • *decide on appropriate controls for the experiment or investigation* • *decide which variables need to be standardized and how to standardize them.*
Presentation of data and observations • Recording data and observations • Display of calculation and reasoning • Layout of data and observations
Example expectations for "Recording data and observations" skill. *Within an investigation, candidates should be able to:* • *record raw results (unprocessed) and calculated results (processed) in an appropriate table with:* - *descriptive headings, including any required units (no units in body of table)* - *heading for the independent variable to the left of (or above, if the table is in rows) the dependent variable* • *record quantitative data to the number of decimal places that is appropriate for the measuring instrument used* • *record qualitative observations using clear descriptions* • *record calculated values (processed results) in an appropriate table.*
Analysis, conclusions and evaluation • Interpreting data and observations • Drawing conclusions • Identifying sources of error and suggesting improvements
Example expectations for "Identifying sources of error and suggesting improvements" skill. *Within an investigation and when using the light microscope and photomicrographs, candidates should be able to:* - *identify systematic or random errors in an investigation, understanding that systematic errors may not affect the trend in results whereas a random error may affect the trend* - *identify the main sources of error in a particular investigation* - *suggest improvements to a procedure that will increase the accuracy of the observations or measurements, including:* - *using a more effective method to standardize relevant variables* - *using a more accurate method of measuring the dependent variable* - *using smaller intervals for the values of the independent variable* - *collecting replicate measurements so that a mean can be calculated* - *suggest how to extend the investigation to answer a new question, for example by investigating a different independent variable or applying the method to a new context*

- *describe clearly, in words or diagrams, improvements to the procedure or modifications to extend the investigation.*

Figure 5 shows part a of question #1 from a past Biology Paper 3 administered in June 2018, demonstrating the depth of Cambridge assessments.

FIGURE 5. FIRST QUESTION FROM PAST BIOLOGY TEST PAPER 3



Note. The full test paper includes a second item (not shown) and is available at https://www.cambridgeinternational.org/programmes-and-qualifications/cambridge-international-as-and-a-level-biology-9700/past-papers/.

This one question, on one of five assessments for the Biology course, provides students with the opportunity to demonstrate inquiry, critical thinking, and communication skills, by:

- Following a detailed series of instructions
- Applying their knowledge of Biology to novel and practical problems
- Conducting an experiment, documenting results, evaluating the process, and clearly and appropriately communicating their findings
- Reflecting on potential sources of error and hypothetical extensions of theory
- Computing and comparing values, estimating outcomes, evaluating findings, and applying biological and mathematical principles

Cambridge Course Grades

Assessment at Cambridge has two purposes: to measure learning and achievement, and to show likely future success.[6] Course grades therefore describe learning and achievement and indicate likely future success.

Knox County teachers and schools can use A Level assessment scores to:

- confirm achievement and performance in relation to the knowledge, understanding and skills specified in the syllabus, to the levels described in the grade descriptions
- help predict which students are well prepared for a particular career and/or which students are more likely to be successful at future college level course work
- help students choose the most suitable course or career.

AS Level scores to:

- guide teaching and learning in the next stages of the Cambridge International A Level course
- help predict which students are well prepared for a particular career and/or which students are more likely to be successful at future college level course work.

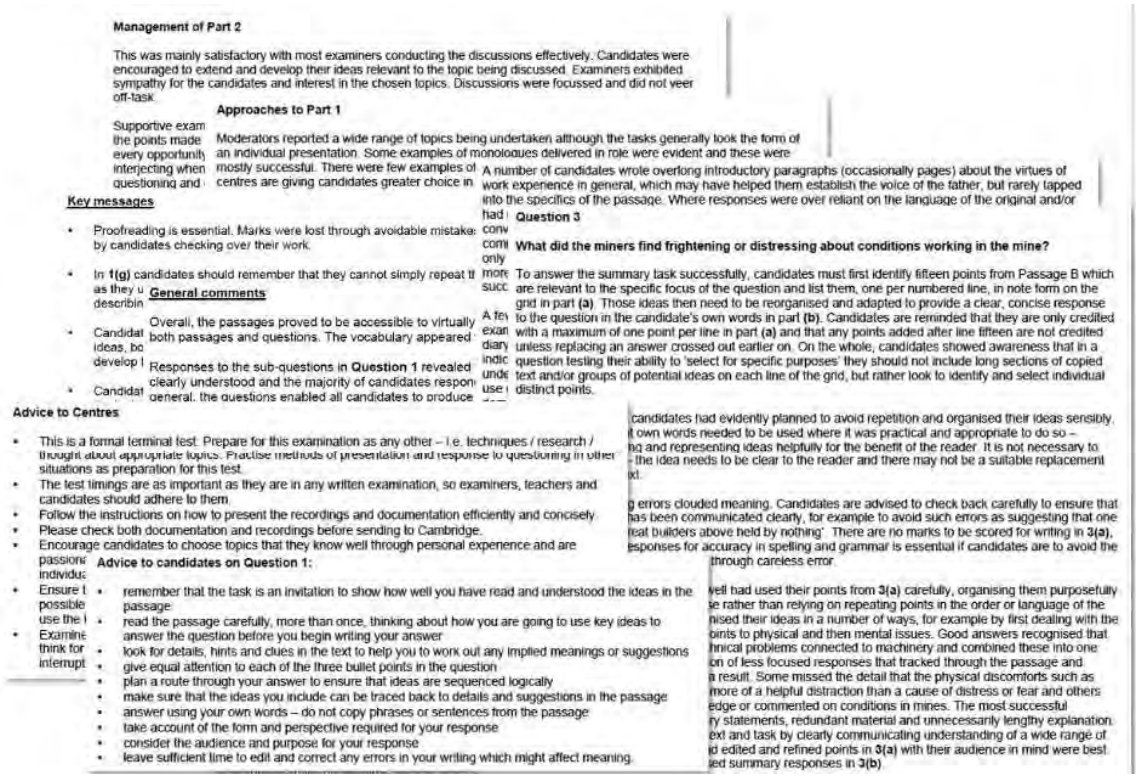
and IGCSE scores to:

- confirm achievement and performance in relation to the knowledge, understanding and skills specified in the syllabus, to the levels described in the grade descriptions.
- help predict which students are well prepared for a particular course or career and/or which students are more likely to be successful taking AS and A Level courses
- help students choose the most suitable course or career.

Principle Examiner Reports

Principal Examiners write detailed reports describing candidates' overall performance on each part of all exam questions. The reports give insight into common mistakes which teachers can explore in class and provide evidence of the validity of the assessments. Some nearly 100 pages long, the reports provide general comments about student performance on the assessment, describe key takeaways from the performances demonstrated, comment on each and every task, provide suggestions to schools and centers in terms of assessment administration, and advice to teachers for students on improving responses (see Figure 6 and Tab VII for examples).

FIGURE 6. EXAMPLE PRINCIPLE EXAMINERS REPORT, IGCSE FIRST LANGUAGE



Management of Part 2

This was mainly satisfactory with most examiners conducting the discussions effectively. Candidates were encouraged to extend and develop their ideas relevant to the topic being discussed. Examiners exhibited sympathy for the candidates and interest in the chosen topics. Discussions were focussed and did not veer off-task.

Approaches to Part 1

Moderators reported a wide range of topics being undertaken although the tasks generally took the form of an individual presentation. Some examples of monologues delivered in role were evident and these were mostly successful. There were few examples of

Key messages

- Proofreading is essential. Marks were lost through avoidable mistakes by candidates checking over their work.
- In 1(g) candidates should remember that they cannot simply repeat t as they u describin

General comments

- Candidat ideas, bo develop
- Candidat

Overall, the passages proved to be accessible to virtually both passages and questions. The vocabulary appeared

Responses to the sub-questions in Question 1 revealed clearly understood and the majority of candidates respon general, the questions enabled all candidates to produce

Advice to Centres

- This is a formal terminal test. Prepare for this examination as any other – i.e. techniques / research / thought about appropriate topics. Practise methods of presentation and response to questioning in other situations as preparation for this test.
- The test timings are as important as they are in any written examination, so examiners, teachers and candidates should adhere to them.
- Follow the instructions on how to present the recordings and documentation efficiently and concisely.
- Please check both documentation and recordings before sending to Cambridge.
- Encourage candidates to choose topics that they know well through personal experience and are passionat individua
- Ensure t possible use the
- Examine think for interrupt

Advice to candidates on Question 1:

- remember that the task is an invitation to show how well you have read and understood the ideas in the passage
- read the passage carefully, more than once, thinking about how you are going to use key ideas to answer the question before you begin writing your answer
- look for details, hints and clues in the text to help you to work out any implied meanings or suggestions
- give equal attention to each of the three bullet points in the question
- plan a route through your answer to ensure that ideas are sequenced logically
- make sure that the ideas you include can be traced back to details and suggestions in the passage
- answer using your own words – do not copy phrases or sentences from the passage
- take account of the form and perspective required for your response
- consider the audience and purpose for your response
- leave sufficient time to edit and correct any errors in your writing which might affect meaning.

A number of candidates wrote overlong introductory paragraphs (occasionally pages) about the virtues of work experience in general, which may have helped them establish the voice of the father, but rarely tapped into the specifics of the passage. Where responses were over reliant on the language of the original and/or

Question 3

What did the miners find frightening or distressing about conditions working in the mine?

To answer the summary task successfully, candidates must first identify fifteen points from Passage B which are relevant to the specific focus of the question and list them, one per numbered line, in note form on the grid in part (a). Those ideas then need to be reorganised and adapted to provide a clear, concise response to the question in the candidate's own words in part (b). Candidates are reminded that they are only credited with a maximum of one point per line in part (a) and that any points added after line fifteen are not credited unless replacing an answer crossed out earlier on. On the whole, candidates showed awareness that in a question testing their ability to 'select for specific purposes' they should not include long sections of copied text and/or groups of potential ideas on each line of the grid, but rather look to identify and select individual distinct points.

candidates had evidently planned to avoid repetition and organised their ideas sensibly.
own words needed to be used where it was practical and appropriate to do so –
and representing ideas helpfully for the benefit of the reader. It is not necessary to
the idea needs to be clear to the reader and there may not be a suitable replacement
errors clouded meaning. Candidates are advised to check back carefully to ensure that
has been communicated clearly, for example to avoid such errors as suggesting that one
eat builders above held by nothing'. There are no marks to be scored for writing in 3(a),
esponses for accuracy in spelling and grammar is essential if candidates are to avoid the
through careless error.

ell had used their points from 3(a) carefully, organising them purposefully
e rather than relying on repeating points in the order or language of the
nised their ideas in a number of ways, for example by first dealing with the
oints to physical and then mental issues. Good answers recognised that
hnical problems connected to machinery and combined these into one
on of less focused responses that tracked through the passage and
a result. Some missed the detail that the physical discomforts such as
more of a helpful distraction than a cause of distress or fear and others
edge or commented on conditions in mines. The most successful
y statements, redundant material and unnecessarily lengthy explanation.
ext and task by clearly communicating understanding of a wide range of
d edited and refined points in 3(a) with their audience in mind were best.
ed summary responses in 3(b).

Digital Mocks Service: Monitoring Student Progress and Providing Developmental Feedback

Cambridge International is committed to supporting student success through robust assessment systems that not only measure achievement but actively enhance learning. Cambridge's Digital Mocks Service, launched in 2023,

exemplifies this commitment by offering a scalable, data-rich, and pedagogically sound approach to preparing students for end-of-course exams.

Monitoring Student Progress

Cambridge's Digital Mocks Service enables schools to monitor students progress with precision and clarity. Over 20,000 learners in 60 countries have participated in digital mocks exams across 17 subjects for Cambridge IGCSE and International AS & A Level. Each student's performance is tracked at both the question level and test level, allowing educators to pinpoint strengths and areas for improvement. Results are delivered via the My Cambridge portal, enabling integration with school data systems and longitudinal tracking.

Developmental Feedback

Cambridge provides targeted feedback that informs teaching and supports student growth. Auto-marked MCQ exams deliver results within two hours, while examiner-marked assessments are returned within 14 days, ensuring timely feedback. Feedback includes not only scores but also answer choices, helping students understand their misconceptions and guiding teachers in planning effective interventions. The platform supports formative assessment practices, encouraging students to reflect on their performance and take ownership of their learning.

Teaching and Learning Impact

The Digital Mocks service is designed as a teaching tool, not just an assessment. IT mirrors the format and standards of end of course exams, providing a like-for-like experience that builds student confidence and exam readiness. Features such as digital note-taking, highlighting tools, and embedded multimedia support diverse learning styles and help students personalize their exam experience. The service aligns with Cambridge's broader philosophy of assessment for learning, where feedback is used to guide instruction and empower students to improve.

Cambridge's Digital Mocks Service is a powerful solution for districts seeking to enhance student preparation, monitor progress, and promote equity. It combines rigorous assessment, actionable feedback, and inclusive design to support teacher effectiveness and help build student confidence and familiarity – ensuring no learner is left behind.

For more information, visit the https://www.cambridgeinternational.org/programmes-and-qualifications/developing-digital-assessment/digital-mocks-service/

Cambridge Approach to Assessment

The Cambridge Code of Practice (available online at https://www.cambridgeinternational.org/ about-us/our-standards) details our approach to assessment and demonstrates our commitment to transparency. Cambridge believes that students are best served when curriculum, teaching, learning, resources, and assessments are closely aligned. Through rigorous assessment development and grading standards, Cambridge programs and qualifications set the standard for international education.

Assessment Development

The Cambridge Code of Practice details the foundational practices and commitments underpinning our IGCSE, AS, and A level qualifications. Some of the key Code of Practice commitments include:

- Aim 2.1(a) – Question papers [assessments] will be consistent with the syllabus and scheme of assessment [for each course]
- Aim 2.1(b) – Each part of each question will assess knowledge and skills that fall within the syllabus.
- Aim 2.2(g) – Mark schemes [rubrics] will award marks positively (e.g., candidates begin with zero marks [points], and marks are earned for credit-worth aspects of their work).
- Aim 2.3 – Question papers will sample the content of the syllabus appropriately.
- Aim 2.4(b) – The wording of papers will be at a suitable level of linguistic demand given the expected age of candidates and the knowledge, understanding and skills being assessed, thus minimizing construct-irrelevant variance across candidates.
- Aim 2.4(f) – Question papers will be such that the effect on the results of the test of irrelevant factors (e.g., gender, language, socio-economic group) is minimized and cultural bias is avoided.
- Aim 2.5 – Question papers will contain items with an appropriate distribution of difficulties (and maintain the intellectual challenge and level of demand from previous years, as far as is reasonable).
- Aim 2.6 – Mark schemes will facilitate reliable marking (providing enough detail to facilitate marking that is sufficiently reliable).
- Aim 2.10 – Candidates will not know the questions in advance. Cambridge takes exam security incredibly seriously and maintains extensive efforts throughout the year to maintain the security of our question papers and items.

Test production is one of Cambridge's 'Core Processes', identified and monitored through a quality management system which is ISO 9001 certified (since 2008). As such, test and item development procedures include high-level governance and oversight, comprehensive procedural documentation, and detailed audit trails of decision making and actions.

During item development, item writers and reviewers are provided with comprehensive guidance to promote the validity and reliability of tests and minimize the risk of construct irrelevant variance (CIV). Internal staff manuals detail assessment design rationales and standard procedures for item development, including structures and specific item-type requirements.

Item writers consider the performance of past items/tasks when developing new items, drawing on statistical analysis of item/test functioning. They receive guidance on how to interpret statistical information, particularly around item facility (p-value) and discrimination, using corrected item-total correlation ("R-rest").

During test production, assessment material is extensively reviewed by multiple individuals at a number of clearly defined stages, to ensure assessments are of a high quality. The process is clearly set out, with owners and checkers at each stage of test production; these include Cambridge staff (i.e., Product Managers, Proofreaders) and external consultants (i.e., Setters, Revisers, Vetters, Assessment Testers, Principal Examiners).

Assessment Delivery

The Cambridge Handbook (or Cambridge Exams Officers' Guide; available at https://www.cambridgeinternational.org/exam-administration/cambridge-exams-officers-guide/) describes clear, consistent, and detailed standardized test administration procedures for all qualifications. The Handbook provides Exams Officers (a person, appointed by a schools' Principal or Head of Center, responsible for the administration of Cambridge exams) with information about all aspects administering Cambridge assessments, including:

- Key times (when exams are to be started by candidates),
- Candidate entries, including access arrangement (accommodation) requests,
- Submitting candidate coursework (for applicable syllabuses),
- Secure storage of exam materials,

- Exam day processes and procedures (including malpractice or similar threats to the security and integrity of Cambridge exam and certificates),
- Results and certificate release from Cambridge, and
- The process for appeals.

Centers offering Cambridge assessments must ensure that all Exams Officers and invigilators (individuals appointed by the Head of Center to properly conduct a particular exam in line with Cambridge regulations) receive adequate training in all test administration procedures.

Both Cambridge and participating Cambridge center provide monitoring of test administration included within test administration training, as well as all other test administration policies. Cambridge also provides an auditing process for reviewing adherence to test administration processes. Cambridge compliance representatives conduct unannounced security inspections at centers across the world during each exam series.

Assessment Marking

The Cambridge Code of Practice details our practices and commitments to ensure candidates receive the appropriate marks on their qualification assessments. Some of the key Code of Practice commitments include:

- Aim 3.1 – Candidates' work will be marked by appropriately qualified Examiners (including at least three years teaching the subject, adequate language proficiency in the scripts language, adequate IT skills and facilities for on-screen marking, and following successful marking standardization trial).
- Aim 3.2 – Examiners will mark in accordance with the mark scheme, ensuring extraneous factors (e.g., handwriting, candidate background, etc.) do not influence marking.

Evidence of Assessment Rigor

In December 2022, the United States Department of Education (US DOE) found Cambridge IGCSE assessments to substantially meet the statutory and regulatory requirements of the Elementary and Secondary Education Act and approved four IGCSE assessments to be offered in place of state assessments as a Locally Selected Nationally Recognized High School Assessment (LSNRHSA). This determination of 'substantially meets' reflects peer-reviewed support for the content, design, administration, security, rigor, marking, and results reporting of Cambridge qualification assessments.

Assessment Validity

The Cambridge Code of Practice details 10 principles of validity which underpin our approach to validity (see Code of Practice, Section 6). Cambridge works to standardize practices of validity in all aspects of assessment design, development, administration, and scoring. A highly coherent validation framework (Shaw & Crisp, 2020; Shaw, Crisp, & Johnson, 2011) grounded in contemporary theory is applied to all of our qualifications. The validation framework focuses on a construct-centered approach to validity (e.g., American Educational Research Association et al., 2014; Messick, 1994) combined with an argument-based approach to validity (Kane, 2004).

The Cambridge validity framework includes interpretive arguments reflective of the entire 'life-cycle' of an assessment (Shaw & Crisp, 2020):

- Construct representation – tasks elicit performances that represent the intended constructs,
- Scoring- scores/grades reflect the quality of performances on the assessment tasks,
- Generalization – scores/grades reflect likely performance on all possible relevant tasks,
- Extrapolation – scores/grades reflect likely wider performance in the domain, and
- Decision-making – appropriate uses of scores/grades are clear.

Evidencing that Cambridge assessments measure the intended cognitive processes is an integrated part of the Cambridge assessment design and evaluation process, beginning with the task types used by item writers and finishing with principal examiners' evaluation of students' skill and cognitive process demonstrated on each assessment item. The setter guidelines highlight the skills, command words, and task types that setters should target so assessments align appropriately with the content outlined in each syllabus. During syllabus development and design, Cambridge performs trials to ensure that the items are measuring the constructs and processes intended (including both qualitative and quantitative feedback). Following every examination series, Cambridge Principal Examiners summarize by assessment, paper, and item the knowledge, skills, and abilities that students needed to demonstrate to perform successfully on the assessment. The Principal Examiner Reports to Teachers (PERTs) highlight how the assessments measured the cognitive processes presented in the syllabus and how students demonstrated these processes on each of the items and papers overall. The PERTs are available to teachers and Exam's Officers, allowing them to gain better insight into the skills abilities expected on Cambridge assessments.

All Cambridge assessments include multiple components (or "papers") that assess different aspects of subject content and are aggregated to give an overall assessment score. The components represent an aspect of the internal structure of the overall assessment and students receive performance scores on each component, in addition to their overall score. Our multi-component assessment model allows for assessments that cover more depth and breadth of the content, as well as introducing additional item types. The inter-component correlations presented in the technical digests are an important indicator of internal consistency within each of our assessments. Cambridge PERTs (described above) highlight the knowledge, skills, and abilities students must demonstrate relative to the course information/constructs provided in the course syllabi.

Additionally, internal Cambridge research (from 2017 and 2021) shows students' performance on one of our qualifications (i.e., IGCSE) predicts their performance on subsequent and latter assessments (i.e., AS and A levels). Correlations were stronger for exams within the same subject (e.g., performance across two Mathematics exams, etc.), however high between-subject correlations were observed. Students performing towards the top of the performance scale for one assessment are likely to achieve similar outcomes on subsequent assessments. Qualitatively, teachers overwhelmingly agree that the Cambridge Pathway supports the progression of both discipline knowledge and specific skills, with each previous program preparing students for the requirements of the next program (e.g., Primary to Lower Secondary, IGCSE to Advanced, etc.).

Assessment Reliability

Cambridge adheres to nationally recognized professional and testing standards to ensure reliability, as described in our Code of Practice (see Section 7). Cambridge evaluates the reliability of our qualification assessments through a combination of statistical precision and expert judgment. Detailed statistical reports (following the Classical Test Theory approach) are generated regularly to analyze and evaluate item reliability and assessment reliability. Reliability statistics commonly include Cronbach's Alpha, standard error of measurement, conditional standard error of measurement, bandwidth (score spacing), and bandwidth-to-SEM ratio (metric for classification accuracy).

Cambridge follows an extensive array of training and quality control procedures for open-ended items (e.g., extended response, essay, etc.) marked by examiners (scorers). Mark schemes are developed alongside item/test development. They include comprehensive instructions to ensure consistent application by examiners, including generic marking instructions, detailed performance descriptors at each level, and exemplar responses and/or indicative content. In order to be approved for live scoring, examiners must complete (and accurately mark) a set

of qualifying scripts, which are reviewed by a senior examiner. During live marking, examiners are monitored by senior examiners, including spot-checking. A range of statistical monitoring techniques are employed to monitor the consistency and accuracy of marking, measuring differences between examiner marks and definitive marks on validation scripts. Where issues are identified, corrective action is taken.

Assessment Fairness, Bias, and Accessibility

Cambridge assessments are administered in over 160 countries globally, highlighting the need for fairness and accessibility across a large number of variable populations. For this reason, fairness, bias, and accessibility checks are an integral part of the test design, development, and scoring processes as noted by the Cambridge Code of Practice and internal core processes. These principles support fairness by minimizing construct irrelevant variance, ensuring standard procedures in the mark schemes, and ensuring all students receive equitable access to the assessment items.

Sensitive analysis for bias is an important part of Cambridge's test development and evaluation (see Cambridge Code of Practice). All staff involved in item/test development receive explicit instructions and extensive training on fairness, bias, and accessibility. Reasonable and appropriate steps are taken to ensure that tests are accessible and fair (unbiased) across student groups. Fairness and accessibility are considered, evaluated, and confirmed throughout course and exam development and review. Explicit guidance is provided for social and cultural considerations and sensitive topics, Anglo-centric bias and national sensitivities, command words, problematic command words, and language guidance. Additionally, sensitivity revisers review items for a variety of potentially sensitive/biasing topics, including: politics, religion, geography, history, social and cultural considerations, and sensitive topics.

The Cambridge Handbook (or Cambridge Exams Officers' Guide) describes detailed standardized test administration procedures for all qualifications, including the provision of access arrangements (accommodations) or test paper modifications for candidates with special educational needs, disabilities, or temporary injuries/illnesses. Such access arrangements or paper modifications enable candidates with specific needs to demonstrate their knowledge, skills, and understanding without changing the demands of the assessment. Allowable access arrangements include: color naming and labeling, computer reader, exemptions, extra time, human reader, practical assistant, prompter, reading aloud by the candidate, reading pens, scribe, supervised rest breaks, supplementary aids, transcription, voice-activated software, and word processor. Allow question paper modifications include: Braille paper, colored paper, expanded text and/or paper size (six options), tactile diagrams, and live speaker (transcript of audio files).

As part of the peer review process as a LSNRHSA vendor, the U.S. DOE validated that the access arrangements and test paper modifications offered on Cambridge qualification assessments align with common accommodations and modifications offered to students with Individual Education Plans (IEPs) and 504 plans in the U.S.

Program Outcomes

Cambridge researchers conduct regular program evaluation studies supporting the efficacy of the Cambridge Pathway and Cambridge Advanced program. Studies consistently demonstrate positive outcomes across key stakeholder groups (i.e., students, schools/districts, and higher education institutions). This evidence underscores measurable improvements in academic achievement, college readiness, and school-wide performance, affirming Cambridge's commitment to equitable and high-quality learning environments that support all learners.

Students

- Participation in Cambridge Advanced is associated with higher high school GPA, increased math, reading, and placement test scores, reduced achievement gaps, and increased graduation and college enrollment rates (Herbic & Vasquez, 2017; Muja, 2018).
- Students report better time-management, organization, and study skills; improved ability to analyze information and think deeply and critically; and increased motivation, dedication, confidence, and responsibility as a result of their participation in the Cambridge program (Shaw, 2011b).
- An overwhelming majority (73%) of former Cambridge students reported their Advanced mathematics courses as very useful preparation for college-level mathematics courses (Darlington & Bowyer, 2017).
- AICE diploma students earned higher college freshman GPAs than AP or IB students, have four-year bachelor's graduation rates higher than AP or IB students, and are less likely to drop out of higher education (Rodeiro, Crawford, & Shaw, 2017; Shaw & Bailey, 2011b),

Schools/Districts

- Putnam County, FL: 100% proficiency in math within one year of Cambridge implementation (Coleman & Wilkinson, 2018).
- Charlotte-Mecklenburg, NC: Science proficiency rose from 45% to 74% in two years (Hayes & Kelso, 2019).
- Fairdale High, KY: College/career readiness rose from 22% to 67%; graduation rate near 90% (Corbin, n.d.; Weston, 2017).
- Rockledge High, FL: College attendance rose from 35% to 75% within five years of implementing the Cambridge Advanced program (Vidal Rodeiro et al., 2017).

Higher Education Institutions

- After earning college course credit for passing exam grades, former Cambridge students outperform their peers on subsequent college courses including, but not limited to biology, calculus, and psychology. Former Cambridge students are more likely to earn their bachelor's degree within four years compared to students earning advanced academic credits from other programs (Chi & Pastorino, 2021).
- After controlling for SAT scores, gender, and race, college students who had taken Cambridge courses in high school were more likely to engage in directed individual studies and to enroll in university honors programs. These effects increased significantly with the number of AICE credit hours earned (Shaw, Warrin, & Gill, 2014).
- In a survey of admissions staff from 130 universities around the world:
    - 100% said Cambridge qualifications give students excellent preparation to succeed at university,
    - 100% agreed Cambridge students have in-depth subject knowledge
    - 99% agreed Cambridge students present reasoned explanations, understand implications, and communicate them logically and clearly, and
    - 98% agreed Cambridge students think independently, logically, and present coherent arguments (Cambridge, 2022).

Summary

Cambridge offers a comprehensive, flexible, and research-backed academic program that aligns with Knox County Schools' strategic priorities. Through rigorous coursework, validated assessments, and robust professional

development, Cambridge supports equitable access to advanced learning and prepares students for college, career, and life. Our methodology ensures fidelity of implementation, responsiveness to local needs, and measurable outcomes that reflect our commitment to excellence and equity.

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Tab IV: Delivery of Services

TAB IV: DELIVERY OF SERVICES 1

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Introduction

Knox County Schools is committed to expanding access to rigorous academic opportunities that prepare students for college, career, and lifelong success. Cambridge International Education offers a comprehensive, scalable, and well-supported framework for delivering advanced academic programming across diverse school contexts. This section outlines Cambridge's capacity to deliver services, the implementation and management plan, key deliverables aligned with RFP requirements, and the ongoing support available to ensure successful adoption and sustainability. Through a structured and collaborative approach, Cambridge ensures fidelity of implementation, responsiveness to local needs, and measurable outcomes for students and educators.

Capacity

Cambridge prints, stores, and ships assessments over eight million exams annually from a 200,000 square foot warehouse outside of Cambridge, England. Cambridge's IT operations are ISO credited – an international standard for quality management systems – which means that they are managed to the highest levels in terms of quality and security. Seventy million items ship from the warehouse every year, of those, nearly 40 million are secure and confidential. We print 48 million pages of confidential test questions annually and scan 31 million responses for remote scoring by over 30,000 remote scorers. Over 50,000 parcels ship each year within tight timeframes that allow all candidates in a region taking the same exam to sit for that exam on the same day, at the same time.

Cambridge has fully functioning platforms and systems for development, instruction, program administration, assessment, scoring, reporting and publishing that require no new development or redesign for KCS.

Implementation

Programs are most effective when implemented as intended regardless of country, region, or type of school or staff experience. Cambridge supports schools through the entire implementation, instruction, assessment and improvement process.

Management Plan

Pivotal to our success are our team members. The leads for the Cambridge team for Knox County Schools are Joette Viggiano and Jeff Brewer. They will be the primary liaisons and points of contact for KCS. They will work closely with KCS school and district staff to successfully adopt and implement the Cambridge curriculum and provide guidance and support as they identify and prioritize emerging needs as the program grows. Joette and Jeff will manage the implementation plan, coordinate the assignment of team members and project resources and ensure tasks are completed on time. This will occur through a series of initial meetings with district advanced academic leadership in conjunction with the school leadership team. Joette and Jeff will continuously support the school via direct communication with the school's Cambridge coordinator and leadership team. However, all district and school level employees can contact their Cambridge representatives at any point if they have any questions. They can also contact the US Customer Service Department at 1-917-810-2660. Our customer service representatives are available 24 hours a day, Sunday through Friday.

Joette and Jeff will be supported by several internal Cambridge teams. The Cambridge teams responsible for events and training, data and analytics, logistics and administration will provide direct support as needed. Mark Cavone, Regional Director, North America, will provide strategic guidance and direction to the Knox County team and ensure sufficient resources allocated are available for the project. Joette Viggiano, School Development Manager, and Jeff Brewer, Senior School Implementation Manager, will provide operational and programmatic oversight, quality control, and resource management support. Regional teams are supported through a matrix management approach. The specialist roles in the regions are line-managed by the Regional Director but also receive guidance and support from their functional lead, who is the relevant manager in Cambridge.

Successfully implementing the Cambridge program requires local fulfillment of the roles described in Table 1.

TABLE 1. CAMBRIDGE ROLES

Role	Description
Cambridge Coordinator	Liaison between Cambridge and Knox County Schools; has full responsibility for the implementation, administration, and monitoring all program aspects within the canters associated with it.
Center	Knox County school registered with Cambridge to administer the program.
Test/Exam Invigilators	Person or classroom teacher assigned and trained to be the proctor of Cambridge assessments and exams; often supervised by Exam Officer.
Head of Center	Person appointed by the responsible person as the head or principal of the center.
Exam Officer	Appointed by the head of center to act on behalf of the center, with specific responsibility for the administration of Cambridge exams; supervises internal moderators and invigilators.

Deliverables

Cambridge International's Implementation Plan describes how we will ensure the KCS program deliverables described in Table 1 are met. These deliverables combine with those described in the RFP (Tab IV of RFP page 12 and Section 4.5 of the RFP, page 11.)

Some deliverables are required program characteristics. For these, we cite the location of evidence describing these features in our response. Other deliverables are tasks, and these we reference in our implementation plan.

TABLE 1. DELIVERABLES (COMBINED FROM RFP SECTION 4.5 AND TAB IV, PAGE 12)

#	Deliverable	Source
1	Cultivate student content and skill development, emphasizing critical thinking, inquiry, reasoning, and communication skills, beginning minimally in 9th grade	Cambridge provides rigorous academic programs for students as young as Pre-Kindergarten. See Tab III, Cambridge Pathway. Our programs integrate advanced subject content with higher-order thinking skills; we develop and measure both. Evidence of this is described in the following sections in Tab III: • Critical Thinking Skills • Interaction of Skills with Course Knowledge • Assessment Model
2	Provide courses and frameworks in multiple content areas that allow students to participate in both individual courses and diploma program courses	Cambridge offers 75 subjects at the IGCSE level and 50 subjects at the Advanced (AS/A) Level. • Courses are described in Tab III, AS/A Level and IGCSE Courses and frameworks are contained within the course syllabi (see materials in Tab VII for examples). Courses may be taken individually or as part of the AICE diploma Program, see Tab III: • The AICE Diploma • Program Flexibility
3	Align with Early Postsecondary Opportunities (EPSO)	Cambridge courses and exams are recognized and approved by the Tennessee Department of Education as an Early Postsecondary Opportunity (EPSO).
4	Provide postsecondary opportunities aligned with university admissions guidelines, specifically for students to: • Earn postsecondary credit • Demonstrate career readiness	Courses and assessments are created to assess the skills employers value most, with input from colleges to ensure they align with college-level expectations and our research supports this. As a result, over 900 American colleges and universities award credit and/or placement for Cambridge courses. See the following sections in Tab III for evidence: • College Credit • The AICE Diploma • Program Flexibility • Assessment Validity • Program Outcomes
5	Rigorous assessments that require students to demonstrate knowledge and skills	Cambridge assessments consist of multiple-measures and multiple-methods and rely little on multiple-choice items. Our assessments provide students with valid, authentic and rigorous opportunities to demonstrate what they have learned and can do. See the following sections in Tab III for evidence: • The Cambridge Pathway • Critical Thinking Skills • Assessments, specifically Assessment Model, Linking of Skills and Course Knowledge, and Multiple Measures, Multiple Methods.
6	Identify student potential	All students have potential, see Tab III, "Program Flexibility".
7	Prepare school and district staff and provide training and/or professional learning offerings about the services and supports included in the program	Cambridge educators are well-supported. • See Tab III, "Helping Schools Succeed" for resources available to schools and teachers; see also the section: Professional Development • See Tab IV, Implementation Plan for how we will prepare and support KCS educators

#	Deliverable	Source
8	Proposed approach to providing services	Described in Tab IV: • Management Plan • Implementation Plan

Implementation Plan

Our comprehensive implementation plan for Knox County Schools gives detailed plans per the solicitation in each of the following stages:

1. School registration
2. Program implementation
3. Staff Preparation
4. Assessment
5. Evaluation and Improvement

Tab III includes detailed descriptions of materials provided for implementation support and professional development opportunities; to avoid repetition these detailed descriptions are not also provided here. Instead, we refer to the relevant sections there.

We assume a start date of January 1, 2026, in reference to the day referenced in the RFP.

School Registration

School staff and teachers review Cambridge Program material and complete the registration process. Cambridge International has created a guidance document answering many of the initial questions schools have, *Becoming a Cambridge International School: A guide to the registration process* (attached in the Tab VII). The document specifically reviews each step of the school registration process outlined in Table 2: School Registration Process.

Table 2: School Registration Process

Steps in School Registration Process		**Details**
1	Complete the Expression of Interest Form	• Obtains key contact details. • Identifies which Cambridge programs and courses you are interested in. • Helps assess whether you are prepared to successfully offer our programs.
2	Complete the Cambridge Application Form	The form is designed for you to tell us more about your school and learners. It also helps us get an understanding of the way in which your school meets our registration quality standards: • mission and educational values • educational management and leadership • approach to teaching and learning • the way in which the physical environment supports teaching and learning and meets our requirements for the secure administration of examinations • legal requirements.

3	Undergo a Cambridge School Approval Visit	The Cambridge School Approval visit will assess school compliance with the requirements set out in the Cambridge Handbook. If more time is needed for some conditions to be met, a school can be approved with conditions. We can discuss any concerns you have about preparation for this visit.
4	Sign Letter of Agreement (LOA)	The LOA is a binding agreement between Cambridge International and each school registering with us. The LOA sets out the conditions of registration including, but not limited to: • having a Cambridge approved secure exam storage area • following personal data protection laws • not allowing third party use of our syllabi and assessments.

Schools participate in Cambridge site visits following application submission to verify conditions for success as outlined in Step 3 of Table 2: School Registration Process. Schools planning to offer courses with lab components must also confirm availability of resources necessary for the labs. Visited schools are approved, approved with conditions, or deemed not yet ready. Prior to registration, school leaders must read *The Cambridge Handbook (International)* as it becomes part of the legal contract between schools and Cambridge. The final step of school registration is for the school to sign a *Letter of Agreement (LOA)* with Cambridge International (Step 4 of Table 2: School Registration Process). A successful process may take up to 12 weeks.

Program Implementation

Buy-in is critical to a successful implementation and should be obtained from various levels of stakeholders, such as principals, leadership staff, teachers, parents, students, oversight boards, advisory councils, counselors, local employers and community organizations. We suggest that schools begin implementation by holding parent, community and other stakeholder group meetings to engage them in the program and build community awareness of and support for the school. Cambridge International provides a Communications Toolkit and sets of Factsheets and Guides to assist schools in this process. In addition, Joette Viggiano and Jeff Brewer can provide assistance and guidance as needed. Materials in the Toolkit are tailored to multiple stakeholder groups and are translated into eight languages. Sharing these resources leads to increased understanding of the program, the available teacher resources, the AICE diploma, postsecondary credit, and other benefits that a comprehensive and challenging curriculum with multiple supports can offer.

Schools should simultaneously hold initial meetings with Joette Viggiano and Jeff Brewer along with school administration to help identify how Cambridge can be implemented in a way that best supports their student population, local priorities, mission, vision, and school improvement goals. This may include identifying the courses to offer based upon teacher capacity, student interest, and any thematic pathways. We encourage school administrators to develop a four-year plan that outlines the progression of Cambridge courses for their school (see an example of Cambridge Course Progression in Tab VII). The purposeful planning of course offerings is to ensure the successful implementation of the program and that students have the capability of earning the AICE diploma.

Tab III, section “Program Implementation Support” describes the resources and guides for schools at this stage of the process, which include the following:

- *Cambridge Handbook*
- *Implementing the curriculum with Cambridge: A Guide for School Leaders*
- *Developing your school with Cambridge: A Guide for School Leaders*
- *Developing the Cambridge Learner Attributes*
- *School Evaluation Domains and Standards*

Joette Viggiano and Jeff Brewer will provide guidance throughout and can advise on the selection of individuals to fill Cambridge roles within each building (e.g., Exam Officer and Cambridge Coordinator.)

Staff Preparation

We provide substantial documentation and resources for our program; schools and teachers don't have to look for, develop, or purchase additional materials to confidently implement Cambridge courses. Many of these are listed in Tab III, Table 5. Cambridge Supports for Students, Parents, Teachers, Administrators and Exam Officers and described in Tab III.

In addition to self-studying guides and handbooks, we provide online and in-person training opportunities, available throughout the year. We offer private training events at the request of districts or schools, and all our current open event dates and locations are always listed at http://www.cambridgeinternational.org/cambridge-professional-development/events-and-training-calendar/.

Joette Viggiano and Jeff Brewer will provide guidance on recommended training for staff. Our approach to training and professional development supports teachers to become confident, responsible, reflective, innovative, and engaged. Joette and Jeff will also provide support to leadership to ensure that their program meets the needs and goals of their district and school.

We provide professional development opportunities year-round, during the summer break period and during the school year. We highly recommend the following training/professional development for each of the roles outlined below.

School leaders should continue their preparation for the program by completing the following.

- Read the *Implementing the Curriculum with Cambridge* document and its companion document, *Developing your school with Cambridge - A guide for school leaders* (these are provided in Tab VII).
- Read the current year's *Cambridge Handbook 2025 International* (this is part of *Letter of Agreement* (LOA) with Cambridge and is included in Tab VII.
- Attend the Getting Started with...your Cambridge specific program webinar for new Cambridge district and school leaders,
- Read the Educations briefs which are pertinent to your Cambridge implementation. These briefs explore important themes in education and demonstrate how they are relevant to the teaching and learning in your school.

School principals select a coordinator to oversee test administration. Coordinator training includes webinars, introductory videos, a training workshop, and self-study.

- Watch the applicable recorded Cambridge Teacher Support Website Navigation webinar: New Cambridge High School Coordinators: Navigating the Cambridge Teacher Support Website.
- Explore the applicable Teacher Support websites. Teachers are supported by Jeff Brewer who can help with initial navigation and explanation of the resources contained on the site.
- Regularly read communications from Cambridge.

Counselors do not need to be selected as it is important that all school counselors become knowledgeable about Cambridge programming and the AICE diploma so that they can answer parent/student/teacher questions. To accomplish this, they should:

- Attending a Cambridge High School Counselor Training workshop.
- Counselors should track students' Cambridge courses to monitor qualifications for the AICE diploma (we have provided an example of one-way counselors might accomplish this, see *Cambridge AICE Program Planning Sheet - Course progression options* in Tab VII).

Coordinators and principals must then select an exams officer to oversee and administer exams. They begin training on the following:

- Online self-study Exam Officer training (on the CIE Direct website).
- Review all the information and videos available in the Cambridge Exams' Officer Guide http://www.cie.org.uk/cambridge-for/exams-officers/cambridge-exams-officers-guide/ including several describing the test administration timeline, tasks and processes in detail, such as:
  - *Cambridge Handbook 2025 International*
  - *Getting Started: A Guide to Exam Administration*
  - *The Exams Officer's Guide*
  - *Invigilating Cambridge Exams* (provided in Tab VII as an example of test administration training materials)
  - *Cambridge Guide to Making Entries*
  - Pre-exam dispatch guides
  - *What to Say to Candidates in an Exam* (provided in Tab VII as an example of test administration support)
  - *Exam Day Checklist* (provided in Tab VII as an example of test administration support)
- Participate in a Cambridge New High School Exam Officer web conference – Phases 1 & 2 of the Exam Cycle.
- Attending a Cambridge High School Exam Officer – Making Entries workshop.
- Participate in a Cambridge New High School Exam Officer web conference – Phases 3 & 4 of the Exam Cycle.
- Participate in a Cambridge New High School Exam Officer web conference – Phases 5 & 6 of the Exam Cycle.

We provide teachers with the subject-specific and instructional resources they need to successfully plan their courses and teach students. The following resources are available throughout the Cambridge course planning and delivery process (some can be openly accessed at www.cambridgeinternational.com and others are fully available through the School Support Hub site once a school is registered):

- Syllabus
- Teacher Guides
- Learner Guides
- Learner Revision Guides
- Schemes of Work
- Coursework Handbook
- Past Test Papers
- Mark Schemes
- Specimen Papers
- Example Candidate Responses
- *Resource Plus[1]
- *Test Maker
- Online Forums

Teachers should download and read course materials and instructional resources for the new courses they will teach (all are provided on the Teacher Support and course-specific websites). This should happen the spring/summer before teaching the course for the first time. After doing so, teachers should begin the following preparation activities:

- Participate in a Teacher Support Website Demo training provided by the Cambridge Coordinator (Jeff Brewer to assist if needed).
- Create a pacing guide/long-term plan of instruction and 6-8 weeks' worth of lessons to implement.
- Complete the online interactive Getting started with… modules on the Cambridge public website https://www.cambridgeinternational.org/support-and-training-for-schools/leading-learning-and-teaching-with-cambridge/
- Attend an Introductory Level Subject Specific Face-to-Face Training for their courses in the fall.
- Implement Cambridge lessons and instructional practices learned in trainings.
- Use the Community Forum on the Cambridge School Support Hub website to have professional discussions with teachers around the world teaching the same course.

As teachers teach their courses, they have several different supports they can provide to students to develop their content knowledge and learning skills. Many of these are outlined in Tab III, Table 5: Cambridge Resources and Supports for Students, Parents, Teachers, Administrators, and Exam Officers. They include the student Learner Guides, Example Candidate Responses (ECR), and Learner Revision Guides. Schools can also utilize Cambridge's Checkpoint test, which can provide a benchmark of learner performance and diagnostic feedback. It assesses skills, knowledge, and understanding at the end of 5th and 8th grades.

Assessment

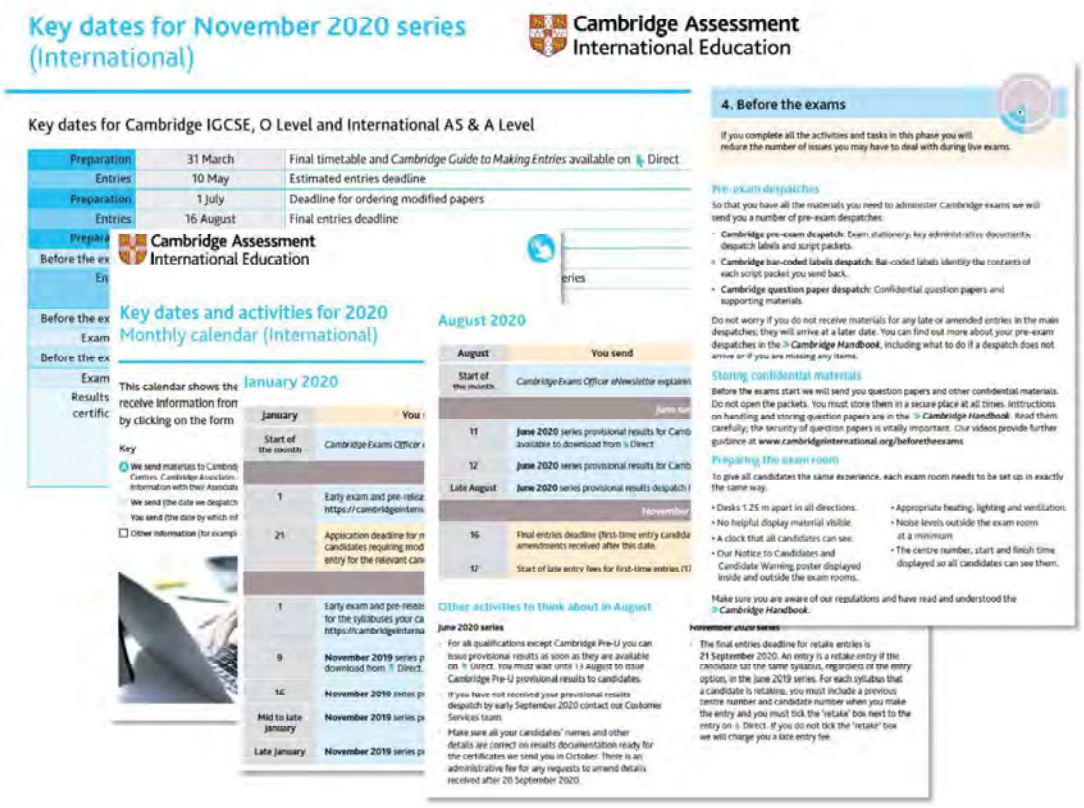
Cambridge assessments are administered consistently worldwide. We provide exams officers with standardized test instructions and the support to follow them and an online tool for managing student

[1] Resources marked with * are at an additional per syllabi annual fee; examples are provided in Tab VII.

exams, obtaining and completing forms, downloading materials, and uploading locally moderated scores and secure documents.

- Exam officers review and follow these materials for each assessment series. Each month, they also review the monthly Cambridge Exams Officer eNewsletter, which summarizes their tasks for that month and provides administration reminders for important upcoming dates and links to any necessary forms or documents (an example is provided in Tab VII).
- They also follow the annual Key Dates and Activities document summarizing the sequence and deadlines for all information and materials transferred from Cambridge to schools and from schools to Cambridge and providing links to all forms, webpages, and registration sites.
- They can attend Exam Officers webinars – series runs twice a year and recordings are available
- They may also participate in online exam officers' forums to ask questions or learn tips from other exam officers at other Cambridge schools worldwide – UK version

FIGURE 1. EXAMPLE ASSESSMENT TIMELINE AND TASK GUIDANCE



Teachers provide forecast grades prior to each exam and score internally moderated locally scored assessment components required in their courses.

Evaluation and Improvement

After completing a course, district and school leaders may participate in Exam results feedback conferences that describe how students performed on each assessment and discuss how this can inform

and improve classroom instruction. After each assessment series, exams officers provide feedback to identify what went well and if they encountered any challenges.

During year 2 of implementing a Cambridge course, teachers may want to participate in additional Subject Specific Face-to-Face, Virtual, or Online Training for applicable courses. Subsequent years (years 2-3 of implementing a Cambridge course) should include reflection and revision of lessons using data available to further refine implementation. Teachers may participate in planning discussions with the Cambridge Coordinator and Administrative Team and attend Enrichment Trainings on instructional best practices such as Active Learning & Assessment for Learning.

Jeff Brewer will also review data after each assessment series with the goal of identifying school successes and/or any areas of improvement. He will meet with school leadership teams to review their growth, achievement, and discuss any concerns they have. Jeff Brewer will support the school and district in creating action plans to improve programming and student success if needed.

Ongoing Support

Jeff Brewer will provide ongoing support throughout all stages of implementation and administration of Cambridge programs. This may involve meeting with principals, teachers, or Cambridge coordinators regularly to stay up to date with KCS' Cambridge program to revisit and revise our four-year plans as needed. Jeff Brewer will review with school administration all resources that are available to assist with vertical alignment from feeder middle schools.

Summary

Cambridge International Education is fully equipped to support Knox County Schools in implementing a high-quality advanced academic program. With robust infrastructure, experienced personnel, and proven systems for assessment, training, and support, Cambridge ensures that all program components from school registration to evaluation are executed with precision and care. The implementation plan addresses every stage of the process, including staff preparation, stakeholder engagement, and continuous improvement. Cambridge's commitment to equity, rigor, and educator empowerment is reflected in its extensive professional development offerings and personalized support. This delivery model positions Knox County Schools to successfully expand advanced learning opportunities and achieve its strategic goals.

Tab V: Experience and References

TAB V: EXPERIENCE AND REFERENCES **1**

CAMBRIDGE UNIVERSITY PRESS & ASSESSMENT **2**

CAMBRIDGE **2**

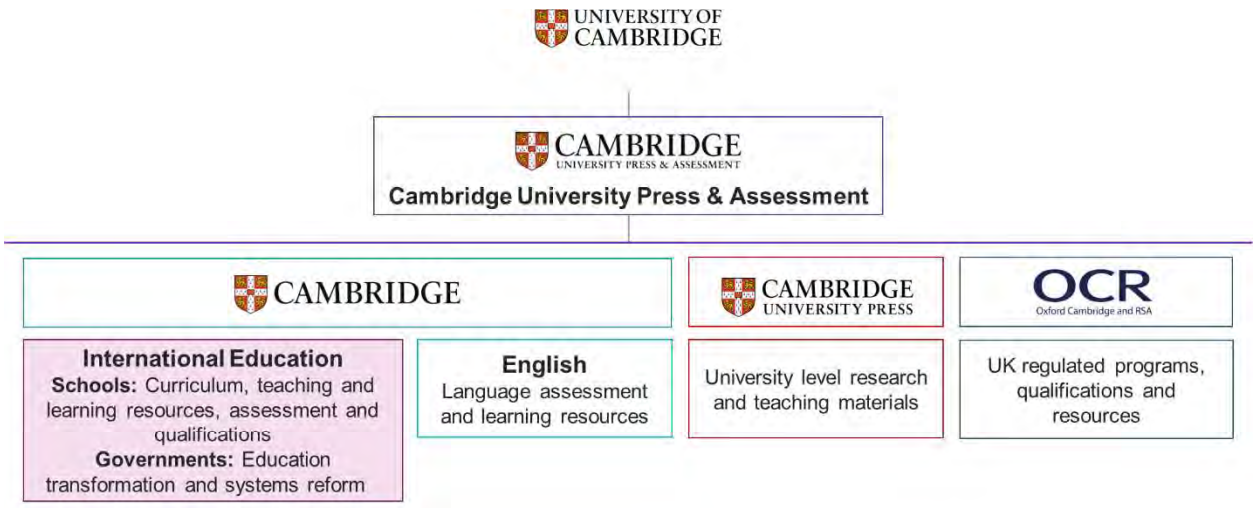
CAMBRIDGE, NORTH AMERICA REGION **3**

CAMBRIDGE WORLDWIDE 4
CAMBRIDGE IN THE U.S. 5
CAMBRIDGE IN TENNESSEE 6
EXPERIENCE WITH SIMILAR PROJECTS WITHIN THE U.S. MARKET 6
STAFF CREDENTIALS AND WORK EXPERIENCE 9
Mark Cavone, Regional Director, North America *10*
Joette Viggiano, School Development Manager *10*
Jeff Brewer, Senior School Implementation Manager *11*

Cambridge University Press & Assessment

Cambridge University Press & Assessment (CUPA) is a division of the University of Cambridge and has approximately 160 years of experience providing goods similar in type and quantity as required by this solicitation. CUPA is a not-for-profit organization based in Cambridge, England, dedicated to designing and delivering assessments to over 8 million learners in over 160 countries. Established in 1858 by the University of Cambridge, we have fourseparate business units: International Education, English, Cambridge University Press, and Oxford Cambridge and RSA, (Figure 1).

FIGURE 1. THE UNIVERSITY OF CAMBRIDGE ORGANIZATIONAL CHART



Cambridge

We offer programs for K-12 students worldwide and provide professional development qualifications for teachers and trainers. Our nine regional teams operate directly with many schools, but operate in some countries through a third party, such as the British Council, or we partner with a ministry of education to provide the national curriculum for that country.

We are the only accelerator program or assessment provider in the U.S. that is associated with a department of a top-ranked university (or any university). As a result, our programs benefit uniquely from the expertise of faculty and departments at the University of Cambridge who consistently play key roles designing Cambridge programs and assessments, including:

a) Cambridge University Press, whose mission it is to disseminate knowledge in the pursuit of education, learning and research at the highest international levels of excellence is the core publisher of resources that support Cambridge programs, providing unparalleled capacity for producing high-volumes of error-free, high-quality materials and exams.
b) The University of Cambridge Faculty of Education is a significant contributor to the improvement of educational policy and practice in international partnership with schools, colleges and other educational agencies. Faculty of Education develop the training programs for Cambridge program teachers.
c) Cambridge Mathematics faculty develop the curriculum, exams, and resources for math courses throughout the Cambridge Pathway.

d) Cambridge English develops and provides English-language learning resources, exams and teacher professional development.
e) The Assessment Research and Development division supports development and evaluation work across the Cambridge Assessment Group.

Cambridge, North America Region

Cambridge has regional teams in nine region (Figure 3). Each region employs a Regional Director and school development, marketing, and training managers. The North American region is unique in that it also staffs a customer success function to ensure that our schools are supported in their implementation and delivery of the Cambridge curriculum. The regional office for New York was established in 2014 and is located at One Liberty Plaza, 165 Broadway, Floor 20, New York, NY, USA.

Contact information for North American schools can be found below:

- Email: info@cambridgeinternational.org
- Phone: **917-810-2660**, 24 hours a day, six days a week, Sunday to Friday.
- FAQs: Help website.
- Webchat: Help website. 24 hours a day, six days a week, Sunday to Friday.

The regional office houses the Regional Director, as well as specialty staff that live within the New York area (see Figure 3). The remainder of the North America team works from remote locations around the country.

FIGURE 3. CAMBRIDGE, NORTH AMERICA ORGANIZATION CHART

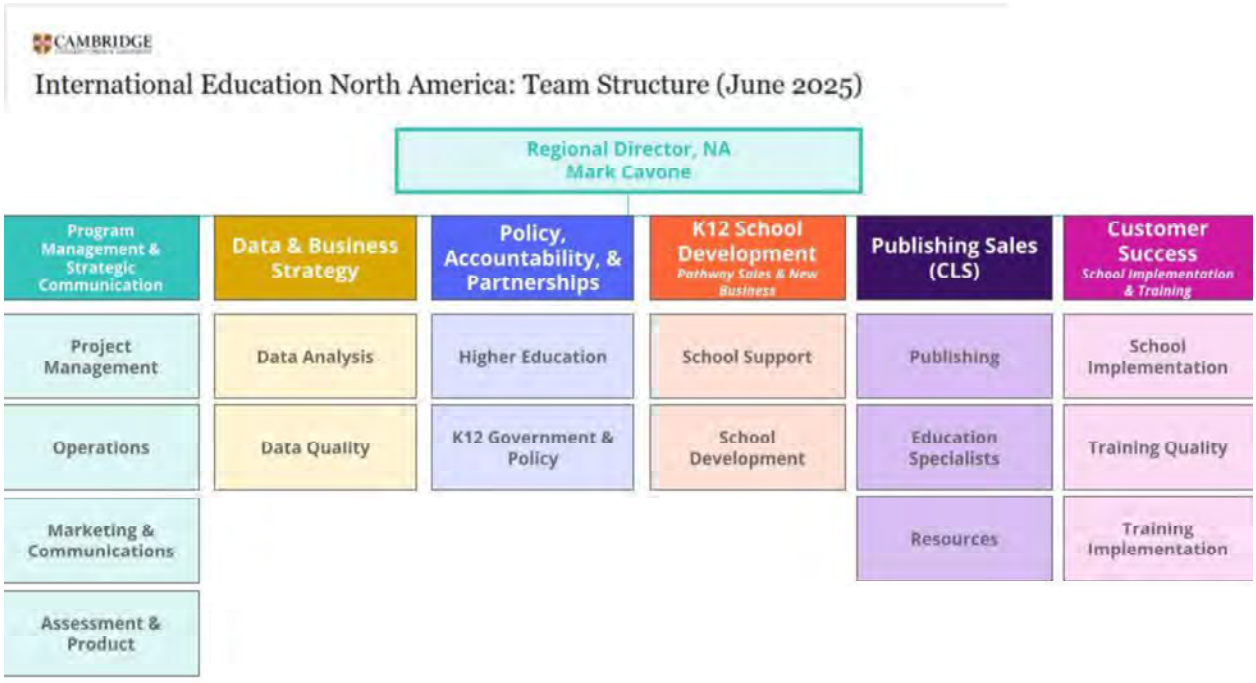
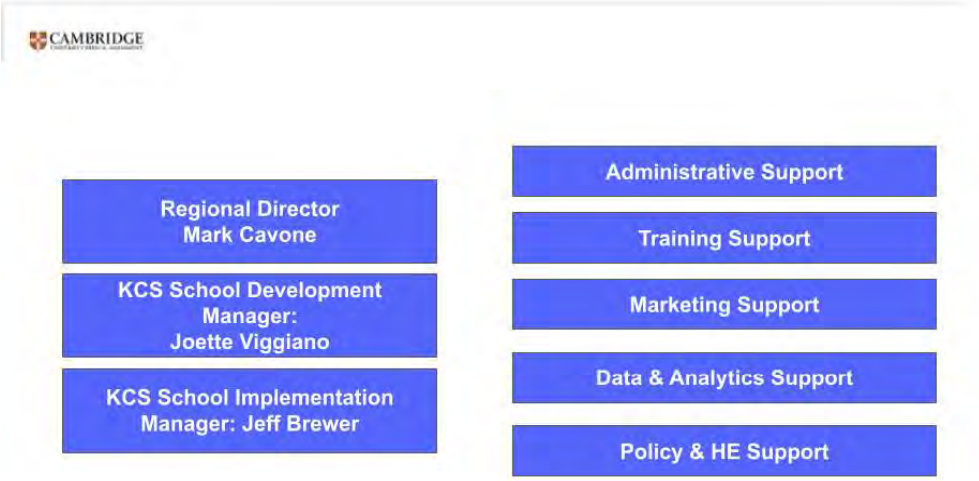


Figure 4 describes the structure of the proposed team for KCS.

FIGURE 4. ORGANIZATION OF CAMBRIDGE'S PROPOSED KNOX COUNTY SCHOOL TEAM



Cambridge Worldwide

The University of Cambridge was established in 1209. Cambridge Assessment was then established approximately 651 years later. Ultimately leading to the first Cambridge exams taken in Trinidad in 1864 by six candidates. We now produce 8 million exam papers each year. Cambridge has designed and implemented curriculum, pedagogy, and assessment systems worldwide. Courses and materials are produced in more than 30 languages. We design and lead national education reform efforts; build capacity in countries with limited resources; support schools during times of change; offer specialized programs in bilingual education, vocational education; and training teachers in new approaches to teaching and learning. We provide over 1,000 teacher training events internationally to educators each year. We work with governments and ministries worldwide, including some of the highest performing systems in the world, such as Singapore, Hong Kong, the Netherlands, France and the U.K., supporting the development and implementation of national education systems that link rigorous standards to aligned curriculum and exams.

Several examples illustrate Cambridge's large-scale educational experience. Through a contract with the United Nations Educational, Scientific, and Cultural Organization (UNESCO), Cambridge consults with Egypt's Ministry of Education and Technical Education to redesign the curricular, assessment, teacher training and vocational education systems. Prior to that Cambridge worked with the Ministry of Education in Hong Kong to evaluate its technical curriculum. Cambridge also conducted a curriculum review in Kuwait for the World Bank. An evaluation and reform of teaching, learning and assessing English for the Malaysian Ministry of Education began in 2013, where, to date, more than 800 master trainers have trained over 26,000 teachers on key initiatives. Cambridge has redesigned the curricular, assessment, and teacher training systems for Kazakstan, Mongolia, and Mauritius (integrating technical and transferable skills with academic subjects) and developed new education and assessment systems for Bahrain, the Bahamas and Lesotho.

Other countries in which Cambridge provides policy and program support include the United Kingdom, India, Pakistan, South Africa, Indonesia, Macedonia, Vietnam, New Zealand, China, Sri Lanka, Brazil, Argentina, Iceland, Singapore, Saudi Arabia, United Arab Emirates, Nepal, Denmark, Mexico, Uganda, Pakistan, Nigeria, Zimbabwe, Turkey, Serbia, The Netherlands, Romania, Germany, France, Spain, Cyprus, Armenia, Italy and Columbia.[1]

Cambridge in the U.S.

Through this experience, Cambridge has developed an understanding that one-size-fits-all solutions do not work. Instead, Cambridge relies on using the existing policies and priorities in states and counties to identify and implement integrated and flexible systems. This unparalleled international experience makes Cambridge uniquely responsive to diverse needs of educational systems around the world and equips the program well to contribute quality educational experiences to the U.S. educational system.

While international students have been admitted to U.S. higher education institutions based on their high school years performance on their Ordinary (O) level or Cambridge Pre-Advanced (IGCSE) and two-year Advanced Level (A) Level courses and examinations since before the 1960's, Bay High School in Panama City, Florida became the first U.S. school to offer these qualifications in 1995.

Now used by approximately 737 school's Pre-K -12 in 25 states and the District of Columbia, Cambridge is growing in some of the largest school districts across the nation, including Omaha Public Schools, Miami-Dade, Palm Beach County, Broward County, and Metro Nashville.[2] More than 163,000 students in the U.S. completed over 309,246 exams in 2024-2025. Six states currently use Cambridge programs as part of their accountability system (FL, TN, MS, VA, NC and WA), and six states (FL, NC, WA, MS, VA and AZ) have approved state-wide policies awarding college credit and making placement determinations based on Cambridge AS & A Level work.

In the United States, demand for Cambridge programs has surged dramatically. As of June 2025, Cambridge entries have grown by 74% since 2022, with a 16% increase in this past year alone. The Cambridge Advanced segment saw a 38% growth, reflecting rising interest in rigorous, college-level coursework recognized by universities nationwide.

The growth is driven by Cambridge's ability to prepare students for college, career, and life through critical thinking, problem-solving, and real-world application. Cambridge is able to offer multiple entry points and custom pathways, allowing students to pursue individual AS levels or the full AICE Diploma, and combine Cambridge with AP, IB, CTE, or dual enrollment.

Cambridge supports diverse learners, including English language learners and students with varied academic needs, through a mastery-based approach and inclusive curriculum design. Cambridge's

[1] https://www.cambridgeinternational.org/news/latest-news/index.aspx?currentpage=1&resultsperpage=10&order=publish_date|desc

[2] Cambridge Assessment International Education (n. d.). Cambridge International Brief Overview.

commitment to excellence is further reflected in its comprehensive professional development for educators, high-quality assessments aligned with global standards, and responsive customer service and school support – ensuring successful implementation and sustained impact.

As districts seek partners with a proven capacity to deliver equitable, rigorous, scalable academic programs, Cambridge International Education stands out as a trusted provider with a track record of success in the U.S.US demand for PreK-12 Cambridge International Education curriculum and assessment soars

Cambridge in Tennessee

In 2013, McGavock and Overton High Schools in Metro Nashville Public Schools (MNPS) joined Cambridge. MNPS had purposively sought out Cambridge as they wanted to increase the number of advanced academic opportunities they had within their district, especially those in underserved areas of the city.

The MNPS Cambridge high school's feeder middle schools Croft, Donelson, and William Henry Oliver added the Cambridge programs in the following years. In 2016, the district added an additional high school, Stratford STEM Magnet High School. In 2023-2025, charter schools Nashville and Rutherford Collegiate Prep and private school Clarksville Christian School (Pre-K – 12) added Cambridge pathway programs. Powell High School in Knox County became the most recent Tennessee school to join Cambridge in June of 2025, and South Doyle High School is in the application and registration process currently.

Experience with Similar Projects within the U.S. Market

The Cambridge program was first approved in 2001 for use in schools statewide following a Florida Department of Education and State Legislature multiyear pilot study. Since then, Cambridge has gained recognition across the United States and states have adopted similar policies recognizing Cambridge as an early postsecondary opportunity.

As examples of similar work that is similar in scope to KCS' scope, we describe our work with three districts below. These include Pasco County Schools and Broward County Public Schools in Florida and Charlotte-Mecklenburg Schools in North Carolina. We are also proud to include the main contacts for each district in Attachment B as references for our work.

Pasco County Schools, Florida

Pasco is a large mostly rural/suburban district with approximately 84,300 students. Pasco High School became a Cambridge school in February of 2014. Since then, 23 schools have been added including elementary through high school. Pasco County has a strong relationship with our organization and a commitment to grow the Cambridge program within their district. Currently, Pasco High School and Anclote High School offer a full set of courses at the AS and A Level, which provide students with opportunities to earn college credit. They also make entries for AICE Diploma candidates each year. In 2020, Pasco County added twelve new Cambridge high school, and in 2024-2025, Pasco County Schools had 6,966 AS and A Level exam entries averaging 10% growth in entries since 2021 ensuring that more

students year on year have the opportunity to earn college credit and be prepared for success in post-secondary courses.

A Cambridge School Development Manager and School Implementation Manager have worked alongside Pasco County Schools to ensure that their schools and staff are fully supported not only during implementation, but throughout the years since inception so that they have continued success and growth of their Cambridge programming. In fact, Pasco County Schools was recognized in 2018 as the mid-sized district of the year due to efforts in growing their Cambridge program while simultaneously maintaining high standards. Some of the support that we provided to the district include, but is not limited to, direct support in school application, curriculum implementation, and ongoing administration of examination and reporting system. In addition, we provided training and support to teachers, school leaders, and exam officers. We have also presented to district stakeholders on the school/district's behalf as needed.

Pasco County has since increased the number of middle and elementary schools using Cambridge Primary and Lower Secondary curriculum, to start preparing students in lower grades for advanced coursework. In addition, several Pasco County schools use Cambridge Checkpoint exams in 5th and 8th grades to identify students with the potential to succeed in advanced courses. Pasco Middle School encourages students with promising results on Checkpoint exams to pursue Cambridge coursework in middle school and high school. The district increases participation among students who may not have applied to or been aware of the Cambridge program, thus helping to increase equity for its students. More on our implementation with Pasco County Schools can be read reviewed here: https://www.cambridgeinternational.org/usa/about-cambridge-international-us/case-studies/pasco-opportunities/

Broward County Public Schools, Florida
Broward County Public Schools (BCPS) is the sixth largest school district in the nation and the second largest school district in the state of Florida serving approximately 247,500 students. Their diverse student population comes from 136 different countries, and they speak 130 different languages.

In 2004, Fort Lauderdale High School, looking to increase college and career readiness of their diverse student population, applied and was approved as a Cambridge school to offer the Cambridge Pre-Adanced (IGCSE) and Cambridge Advanced programs, which can qualify students for the AICE Diploma. Year on year, Cambridge provides subject-specific teacher training, instructional planning and program implementation support at both the school and district level. Fort Lauderdale High School has continued to expand the number of Cambridge courses offered and students taking them each year.

BCPS increased access to the Cambridge program in 2013 per the request of other district schools. It has since registered 67 additional schools with Cambridge ranging from elementary to high school. Due to their program success, BCPS district was the recipient of the Cambridge 2017/18 and 2020/21 large size District of the Year award in recognition of their simultaneous increase in student access to Cambridge's rigorous college and career readiness courses and successful performance on their Cambridge Advanced examination.

In 2023, BCPS conducted research on their advanced academic programs. Cambridge Advanced demonstrated superior performance in student outcomes compared to other advanced academic pathways, including Advanced Placement and International Baccalaureate. This was also true across racial and ethnic demographics – showing the smallest performance gap between White and Hispanic students. These findings position Cambridge as a leading solution for BCPS as they consistently seek to expand access to rigorous academic opportunities while advancing equity across diverse student populations in an effort to close achievement gaps.

Cambridge provided many services and support at both the district and school level to help ensure a successful program implementation. Examples include presentations and program orientation briefings for district school boards and staff, application process support, program implementation planning and budgeting, and training for teachers, school administrators and examination officers. We also collaborate with districts and state departments of education on Cambridge program related policies and have recognitions specialists who work in the U.S. and globally with higher education institutions and colleges to ensure our students' achievements in the Cambridge program are suitable recognized in their admissions and placement process. A summary of our research with Broward can be reviewed here: https://www.cambridgeinternational.org/Images/737462-expanding-options-in-advanced-academics-and-global-education-impacts-and-outcomes-in-broward-county-public-schools.pdf

Charlotte-Mecklenburg Schools, North Carolina

Charlotte-Mecklenburg Schools (CMS) are located in Charlotte, North Carolina and serve more than 143,940 students across 186 schools throughout Mecklenburg County. These students represent 184 different countries and various cultural and ethnic backgrounds speaking 204 languages and dialects. CMS is divided geographically into nine regional learning communities each of which are managed by an Area Superintendent. The Northwest Learning Community was experiencing a decline in enrolment and began searching for additional programs of instruction which would attract, engage, and increase college and career readiness levels of students. They wanted to ensure that the six schools that make up the Hopewell Feeder Pattern had equal opportunities to rigorous programs like those students in other feeder patterns as well as an international perspective in their courses.

CMS heard about the rigorous Cambridge program for grades Kindergarten through high school in an Education Week article published in 2014. Following Cambridge program presentations in 2015, CMS decided to register Hopewell High School and their five feeder schools (Bradley Middle School, Mountain Island Lakes Academy, Barnette, Long Creek and Torrence Creek Elementary Schools). Cambridge supported the district during the registration process and provided additional collaboration and support to CMS district staff with program implementation planning at the six schools, making community stakeholder presentations, assisting with budgeting and delivering customized teacher and exam officer training.

Due to the ongoing success of their students and the program, CMS added 9 additional Cambridge International schools from 2018-2024. In 2025, five Cambridge high schools delivered 1,307 exams to students, which is a 20% average increase year on year since 2021. Additionally, in 2025, Palisades High School, Hopewell High School, and West Mecklenburg high school collectively graduated 23 students

with a Cambridge AICE Diploma, positioning these North Carolina students competitively in both in-state and out-of-state college admissions.

Hillsborough County Public Schools

Hillsborough County Public Schools (HCPS), the seventh-largest school district in the United States and the third-largest in Florida, serves more than 224,000 students across 309 schools. Reflecting the rich diversity of its community, HCPS educates students from over 190 countries who speak more than 100 languages.

In 2020, HCPS launched its Cambridge journey with the registration of four pioneering schools: Jule F. Sumner High School, Franklin Middle Magnet School, Ferrell Middle Magnet School, and Rodgers Middle School. Building on the early success of these schools, the district made a bold commitment in 2022 to expand the Cambridge Advanced International Certificate of Education (AICE) program to 14 additional high schools and one middle school, with the goal of full implementation across all 28 high schools.

Between 2023 and 2025, HCPS continued its strategic expansion, ultimately integrating the Cambridge Pathway into 40 middle and high schools. This growth reflects the district's unwavering dedication to equity and excellence, ensuring that thousands more students have access to rigorous, internationally benchmarked academic opportunities. Through a variety of implementation models tailored to each school's context—and supported by robust professional development and community engagement—HCPS has achieved remarkable outcomes.

Cambridge exam pass rates increased from 58% to 66%, and in the 2023–24 academic year alone, students earned over 72,000 college credit opportunities. In the 2025 exam series, HCPS made 30,237 Cambridge exam entries which is a 1,577% increase from just 1,825 entries in 2021. Schools such as Leto, Wharton, and Robinson High exemplify how the Cambridge Pathway empowers diverse learners to thrive and succeed.

In recognition of its outstanding achievements, HCPS was named the **Cambridge International District of the Year for 2024–25** in the Large District category. This prestigious award celebrates the district's success in expanding access to Cambridge programs while maintaining high levels of student performance on Cambridge Advanced examinations.

Read the full case study here: Balancing Accelerated Excellence – Hillsborough County's Integration of Cambridge AICE in Every High School

Staff Credentials and Work Experience

Cambridge proposes a highly qualified and dedicated team to support KCS. The core team includes Joette Viggiano, Jeff Brewer, and Mark Cavone. The sections below summarize the qualifications for each, and Tab VII provides full resumes.

Mark Cavone, Regional Director, North America

Mark Cavone, Regional Director, North America, is accountable for providing strategic oversight, and leadership for Cambridge University Press and Assessment in the United States. Joette Viggiano and Jeff Brewer, the Knox county contacts are members of the Schools Development and Schools Implementation functions within the US Region. Mr. Cavone is a seasoned senior program development executive with over 30 years of experience leading, developing, and delivering capabilities that improve student achievement, education program quality, as well as productivity, quality, and efficiency. Mark has proven success delivering educational programs and infrastructure leading to significant program development and improvement with specific expertise in new educational product introductions; educational program development; schools and higher education data management accountability systems including assessment scoring/score reporting.

Currently Mr. Cavone leads Cambridge Press and Assessment, Inc. USA, reporting to Cambridge International Education and the University of Cambridge, Cambridge, UK. In this role, In this role he is responsible for all school development, education policy, marketing and operations activities for the United States and Canada. From the organization's North American headquarters in New York City, he manages a team of skilled education industry professionals responsible for growing and supporting Cambridge schools across North America. To date, since joining Cambridge International, he has built and developed an infrastructure and headquarters for Cambridge International operations in the USA and has driven major policy changes at the state level and has facilitated an average 20% growth per year over his 11 years on the job.

Prior to joining Cambridge International, Cavone was a 10 year employee of the College Board where he was last the Executive Director of AP Program Operations, Mr. Cavone provided senior leadership for all facets of the AP Program, including leading the AP Program's operations, data management and finance, and managing senior staff.

Mr. Cavone received a master's in business administration with a focus on Marketing from Pace University, In New York, NY. He also has a Bachelor of Science in Business Management from Syracuse University, in Syracuse New York.

Joette Viggiano, School Development Manager

Joette Viggiano brings over 17 years of experience in education, with a strong foundation in both instructional practice and program leadership. Originally from New Jersey, Joette holds a bachelor's degree in biology and a master's degree in educational leadership: administration and supervision. She began her career as a Cambridge Lower Secondary Science teacher in Miami-Dade County Public Schools (M-DCPS), where she later served as a Cambridge coordinator and district supervisor of international programs. In that role, she oversaw 121 international education programs across the district, demonstrating her commitment to expanding access to high-quality academic opportunities.
In May 2024, Joette joined Cambridge as a School Development Manager, representing the organization across six southeastern states: Alabama, Arkansas, Georgia, Louisiana, Mississippi, and Tennessee. Her work focuses on supporting schools in implementing Cambridge programs and ensuring students have engaging, globally recognized educational experiences.

In this role, she leads strategic outreach and engagement efforts, including presenting at local and national conferences. Joette actively researches how Cambridge programs can make a meaningful impact in schools and districts, with a focus on expanding college and career pathways for students. Her work is driven by a deep commitment to creating engaging, inclusive, and globally relevant educational experiences. Joette is proud to support schools in implementing Cambridge programs that empower students and prepare them for success in an ever-evolving world.

Jeff Brewer, Senior School Implementation Manager

Jeff Brewer is a seasoned educator and school improvement leader with more than 25 years of experience in K–12 education, assessment, and curriculum implementation. He currently serves as School Implementation Manager for Cambridge, where he supports more than 300 schools across multiple states. In this role, he partners with district and school leaders to expand student equity and access, strengthen curriculum fidelity, promote professional development aligned with both the Danielson and Marzano teacher evaluation models. His efforts have directly contributed to measurable KPI growth in program success, while also enhancing alignment with Florida Department of Education initiatives such as Bright Futures.

Previously, Mr. Brewer served Marion County Public Schools for over two decades as an Assistant Principal, Cambridge Coordinator, Activities Director, Counselor, Dean, and Teacher. During his tenure, he spearheaded the launch and growth of Cambridge programs at multiple schools, coordinated AP and Cambridge examinations, managed magnet program development, and led his school to recognition as a Cambridge National Demonstration Center and Magnet Schools of America School of Excellence. His experience spans strategic planning, curriculum development, teacher coaching, student support, and large-scale program and budget management. He has also presented at national conferences including High Schools that Work, Model Schools, and Cambridge professional forums.

Mr. Brewer holds advanced degrees in School Counseling and Educational Leadership from the University of Florida and St. Leo University. He is certified in Educational Leadership and School Counseling, bringing both academic expertise and practical leadership to his work with schools and districts.

Tab VII: Other Information

Cambridge provides additional information in this Tab to exemplify, illustrate or explain key processes, resources, and philosophies described in Tabs III, IV and IV. Documents are provided alphabetically. Those in bold are found in the print copy of the RFP. All others are included in the electronic version only.

- An International Education from Cambridge
- **AS & A Level Factsheet**
- **AS & A Level Guide for Universities**
- **Cambridge Advanced – An introduction for Parents**
- Cambridge Course Progression Sample 1
- Cambridge Handbook 2025
- **Cambridge International AS and A Level English Language (9093) June 2025 Examiner Report**
- Cambridge International AS and A Level English Language (9093) June 2025 Question Paper 11
- Cambridge International AS and A Level English Language (9093) June 2025 Question Paper 11 Mark Scheme
- **Cambridge International AS and A Level English Language (9093) Specimen Paper 4 Mark Scheme**
- **Cambridge International AS and A Level English Language (9093) Specimen Paper 4**
- **Cambridge International AS and A Level English Language (9093) Syllabus**
- Cambridge International AS and A Level English Language (9093) Learner Guide
- Cambridge International Facts & Figures
- Cambridge Pathway Factsheet for Parents
- Cambridge Pre-Advanced (IGCSE) A Guide for Parents
- Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Examiner Report 2025
- Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Specimen Paper 1
- Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Specimen Paper 2 Insert
- Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Specimen Paper 2 Mark Scheme
- Cambridge Pre-Advanced (IGCSE) English - First Language (0500) Specimen Paper 2
- Cambridge Pre-Advanced (IGCSE) English - First Language English (0500) Syllabus
- Cambridge Pre-Advanced (IGCSE) English - First Language Specimen Paper 1 Insert
- Cambridge Pre-Advanced (IGCSE) English-First Language Learner Guide
- Cambridge Professional Development Pricing - North America 2025-2026
- **Cambridge School Leader Standards**
- **Cambridge Teacher Standards**
- Cambridge_psychometrics_presentation_of_evidence 6
- Developing the Cambridge Learner Attributes
- Developing Your School with Cambridge A Guide for School Leaders
- **Education Brief Assessment for Learning**
- **Education Brief Professional Development**
- Exam Day Checklist
- Exam Fees USA May-June 2026

- Exams Officer eNewsletter - September 2025 international edition
- **Factsheet Metacognition**
- Fees List USA 2025-26.pdf
- Getting started with Active Learning
- Global Perspectives & Research (9239) Learner Guide
- Global Perspectives and Research (9239) June 2025 Examiner Report
- Global Perspectives and Research (9239) June 2025 Paper 11 Insert
- Global Perspectives and Research (9239) June 2025 Paper 11
- Global Perspectives and Research (9239) June Paper 11 Mark Scheme
- Global Perspectives and Research (9239) Specimen Paper 1 Insert
- Global Perspectives and Research (9239) Specimen Paper 1 Mark Scheme
- Global Perspectives and Research AS & A Level Syllabus
- Global Perspectives and Research Specimen Paper 1
- **Global Recognition Factsheet**
- IGCSE Guide for Universities.pdf
- Implementing the Curriculum with Cambridge A Guide for School Leaders
- Invigilating Cambridge Example
- Jeff Brewer Resume
- Joette Viggiano Resume
- Mark A Cavone Resume
- PD Education Leadership Syllabus
- PD Teaching and Learning Syllabus
- PD Teaching Bilingual Learners Syllabus
- PD Teaching with Digital Technologies Syllabus
- Professional Development Qualifications A Guide for School Leaders
- Support for Cambridge International Schools
- What to Say to Candidates in an Exam

Tab VIII: Exceptions

1.15 Payment Method

Cambridge will accept Knox County's Credit Card (Visa) as a form of payment. Upon awarding of the contract, we will need to clarify if any merchant fees are assessed if this form of payment is used.

2.7 Criminal History Records Check:

Cambridge International agrees to have employees working with Knox County schools submit to a criminal history record check at their expense, conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employees to enter school grounds when students are present pursuant to Tennessee Code Annotated Section 49-5-413. However, due to Covid-19 and Addendum II, we will submit the Criminal History Affidavit of Compliance upon contract award.

2.12 Independent Contractor:

Cambridge International acknowledges that its employees serve as independent contractors and that Knox County shall not be responsible for any payment, insurance or incurred liability. If Knox County needs further clarification about our current coverage, Cambridge agrees to review insurance coverage upon awarding of the contract.

2.19 Right to Inspect:

Cambridge International agrees to Knox County's right to make periodic inspections of the manner and means the service is performed or the goods are supplied and warehoused with the exclusion of DC10, a secure warehouse location in the UK, where our examinations are printed and stored. This request is made to ensure and maintain the integrity of our assessments.

3.5 Award Length:

Knox County reserves the right to purchase other advanced academic products and/or services from other vendors if the need arises. However, the products and services referred to in this solicitation are solely provided through Cambridge International and are copyright and therefore, not provided through any other vendor.

3.9 Contract Execution:

Cambridge International understands and accepts that Knox County will draft a Contract upon award of this proposal. However, Cambridge also requires Letters of Agreement (LOA) with each individual school. The LOA is a binding agreement between Cambridge International and each school registering with us. The LOA sets out the conditions of registration as briefly outlined in Tab IV: Delivery of Services (Table 2: School Registration Process). A copy of the LOA can be provided for review by your legal team upon awarding of the contract.

3.17 Insurance:

Cambridge International understand that upon the notification of Intent to Award, the successful vendor will be required to submit a Certificate of Insurance (COI). Cambridge International requests that upon awarding of the contract that additional information be provided regarding listing Knox County as an additional insured.

3.18.2 Invoice Detail / 3.19 Invoicing Procedures:

Upon awarding of the contract, Cambridge International will work with Knox County to make sure invoices are detailed sufficiently for purposes of payment. Explanation of what supporting documentation might need to be included with invoice will be required as outlined in Tab VI.

3.26 Pricing:

Pricing has been outlined in Tab VI (Proposed Cost) in detail. Cambridge International has estimated an average 3-year price for the 36 month period of this contract as outlined in Tab VI.

ATTACHMENT B
KNOX COUNTY PROCUREMENT DIVISION
REFERENCES
REQUEST FOR PROPOSAL NUMBER 3688

Vendor Name: Cambridge University Press and Assessment

Proposers shall submit a list of three (3) projects of similar size which have been in service for at least five (5) years. Each vendor is responsible for obtaining approval to submit and confirming that the contact information provided for each reference is accurate. Knox County will not be responsible for gathering additional information for references that are incomplete or incorrect. References checks will be sent via email only. Reference Forms that cannot be delivered with the contact information listed, not returned prior to the deadline listed on the form, or not returned at all will be scored accordingly. Do not list Knox County Government or Knox County Schools as a reference.

Name of Firm: Pasco County Schools
Contact Person: Samantha Del Valle Phone Number: 1-813-794-2547
Email Address: staylor@pasco.k12.fl.us Fax Number: 1-813-794-2112
Nature of Contract: Provision of Cambridge Programming for District Schools
Services Provided: Cambridge curriculum, resources, assessments, training and professional development
Dollar amount: $ 1,300,000 (over life of contract)
Contract start date: January 2023 Contract end date: September 30, 2025

Name of Firm: Broward County Public Schools
Contact Person: Guy Barmoha Phone Number: 754-321-2124
Email Address: guy.barmoha@browardschools.com Fax Number: 1-754-321-2718
Nature of Contract: Provision of Cambridge Programming for District Schools
Services Provided: Cambridge curriculum, resources, assessments, training and professional development
Dollar amount: $15,670,000(over life of contract)
Contract start date: October 1, 2022 Contract end date: September 30, 2025

Name of Firm: Hillsborough County Public Schools
Contact Person: Jazheel Lenegar Brown Phone Number: (813) 272-4965
Email Address: jazheel.lenegar@sdhc.k12.fl.us Fax Number: 1-980-343-5990
Nature of Contract: Provision of Cambridge Programming for District Schools
Services Provided: Cambridge curriculum, resources, assessments, training and professional development
Dollar amount: $11,700,000 (over life of contract)
Contract start date:October 1, 2022 (over life of contract) Contract end date: September 30, 2025

CAMBUNI-01 VIKUMAR

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 10/1/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Aon Risk Services Northeast, Inc.
One Liberty Plaza
165 Broadway, Suite 3201
New York, NY 10006

CONTACT NAME:
PHONE (A/C, No, Ext):
FAX (A/C, No):
E-MAIL ADDRESS:

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Great Northern Insurance Co.	20303
INSURER B : Federal Insurance Company	20281
INSURER C : Bankers Standard Ins Co	18279
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
Cambridge University Press and Assessment
1 Liberty Plaza
New York, NY 10006

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY			99509626GAB	7/31/2025	7/31/2026	EACH OCCURRENCE	$ 1,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 1,000,000
							MED EXP (Any one person)	$ 10,000
							PERSONAL & ADV INJURY	$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 2,000,000
	X POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ Included
	OTHER:							$
B	AUTOMOBILE LIABILITY			(25)7356-28-27	7/31/2025	7/31/2026	COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
	X ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	HIRED AUTOS ONLY / NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
							Comp./Coll. Ded	$ 1,000
B	X UMBRELLA LIAB X OCCUR			79877018	7/31/2025	7/31/2026	EACH OCCURRENCE	$ 10,000,000
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$ 10,000,000
	DED X RETENTION $ 10,000							$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			2671746726	7/31/2025	7/31/2026	X PER STATUTE / OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y / N: N	N / A					E.L. EACH ACCIDENT	$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
RE: Proposal Number: 3688. Knox County Procurement Division is included as Additional Insured in accordance with the policy provisions of the General Liability and Automobile Liability policies.

CERTIFICATE HOLDER

Knox County Procurement Division
1000 North Central Street
Suite 100
Knoxville, TN 37917

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



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AGENCY CUSTOMER ID: CAMBUNI-01 VIKUMAR

LOC #:

ADDITIONAL REMARKS SCHEDULE

AGENCY		NAMED INSURED
Aon Risk Services Northeast, Inc.		Cambridge University Press and Assessment 1 Liberty Plaza New York, NY 10006
POLICY NUMBER		
SEE PAGE 1		
CARRIER	NAIC CODE	EFFECTIVE DATE: SEE PAGE 1
SEE PAGE 1	SEE P 1	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

Workers' Compensation
Policy Number- 2671757732
Policy Term -07/31/2025 to 07/31/2026
Underwriting company- Federal Insurance Company
Each Accident- $1,000,000
Policy Limit- $1,000,000
Each Employee- $1,000,000

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CHUBB®

Premium Summary

Chubb Group of Insurance Companies
202B Hall's Mill Road
Whitehouse Station, NJ 08889

Named Insured and Mailing Address

CAMBRIDGE UNIVERSITY PRESS AND
ASSESSMENT
1 LIBERTY PLAZA, 20TH FLOOR
NEW YORK, NY 10006

Policy Number 9950-96-26 GAB

Effective Date SEPTEMBER 30, 2025

Issued by the stock insurance company indicated below, herein called the company.

GREAT NORTHERN INSURANCE COMPANY

Producer No. 0041860-99999

Incorporated under the laws of *INDIANA*

Producer AON RISK SERVICES NORTHEAST INC
7910 LEHIGH CROSSING #1
VICTOR, NY 14564-0000

Policy Period

From: JULY 31, 2025 To: JULY 31, 2026
12:01 A.M. standard time at the Named Insured's mailing address shown above.

Premium Payment

The First Named Insured shown in the Declarations is responsible for the payment of all premiums and will be the payee for any return premiums we pay.

Premium Audit

Certain classifications within our rates and rules indicate that premiums calculated therefrom can be significantly affected by large increases or decreases in your business results. Based upon our underwriting review of information provided by you, we may at our discretion perform a premium audit. You may also request such an audit.

If an audit is conducted and additional premiums are due, they are payable upon notice to the First Named Insured. If as a result of an audit the premium paid is greater than the earned premium, we will return the excess to the First Named Insured. The First Named Insured must keep records of the information we need to perform the audit and send us copies at such times as we may request.

Payment Plan - Annual

TOTAL (Excluding Taxes, Surcharges and Fees) **$ 0**

ADDED FORM ADDL INSURED-SCHEDULED PERSON OR ORGANIZATION
8B-02-2367.

Premium Summary
(continued)

The policy premium, taxes, surcharges and fees will be billed separately.

CHUBB®

Liability Insurance

Schedule of Forms

Policy Period	JULY 31, 2025 TO JULY 31, 2026
Effective Date	SEPTEMBER 30, 2025
Policy Number	9950-96-26 GAB
Insured	CAMBRIDGE UNIVERSITY PRESS AND ASSESSMENT
Name of Company	GREAT NORTHERN INSURANCE COMPANY
Date Issued	SEPTEMBER 30, 2025

The following is a schedule of forms issued as of the date shown above:

Form Number	Edition Date	Form Name	Effective Date	Date Issued
80-02-2322	4-94	DEFENSE OUTSIDE LIMITS	07/31/25	08/06/25
80-02-8269	3-09	COVERAGE TERRITORY, SCHEDULED	07/31/25	08/06/25
80-02-8531	6-23	EXCL-ACCESS/DISCLOSURE CONFID PERS MATERIAL	07/31/25	08/06/25
80-02-8636	11-17	WAR - EXCLUSION	07/31/25	08/06/25
80-02-2367	5-07	ADDL INSURED-SCHEDULED PERSON OR ORGANIZATION	09/30/25	09/30/25
80-02-0010	4-94	LIABILITY DECLARATIONS	09/30/25	09/30/25
80-02-0445	6-23	EXCL-VIOLATION OF LAWS ADDRESS. DATA PRIVACY	07/31/25	08/06/25
80-02-2000	4-01	GENERAL LIABILITY	07/31/25	08/06/25
80-02-2012	6-98	EMPLOYEE BENEFITS ERRORS OR OMISSIONS	07/31/25	08/06/25
80-02-2336	3-17	EXCLUSION - AIRCRAFT PRODUCTS	07/31/25	08/06/25
80-02-2394	4-01	EXCLUSION - LEAD	07/31/25	08/06/25
80-02-2397	4-01	EXCLUSION - TOTAL POLLUTION	07/31/25	08/06/25
80-02-2658	4-01	EXCLUSION - PRIVACY	07/31/25	08/06/25
80-02-2717	2-06	NEW YORK MANDATORY	07/31/25	08/06/25
80-02-2718	4-94	NEW YORK MANDATORY - DEF./LOADING/UNLOADING	07/31/25	08/06/25
80-02-2846	2-06	NEW YORK MANDATORY	07/31/25	08/06/25
80-02-6403	1-15	CAP ON CERTIFIED TERRORISM LOSSES	07/31/25	08/06/25
80-02-6428	8-04	EXCLUSION-PROFESSIONAL LIABILITY, TOTAL	07/31/25	08/06/25
80-02-6528	6-23	EXCL-RECORDNG/DISTRIB MATERL/INFO VIOL OF LAW	07/31/25	08/06/25
80-02-6552	5-05	EXCL ASBESTOS,SILICA,SIM CMPD INCL MIXED DUST	07/31/25	08/06/25
80-02-6989	1-09	NY MAND-DUTY TO REPORT CLAIMS/NOTICE OF LOSS	07/31/25	08/06/25
80-02-6991	1-09	NY MAND-DUTY TO REPORT CLAIMS/NOTICE OF LOSS	07/31/25	08/06/25
80-02-8365	1-12	EXCL-SCHEDULED DISEASES, EXCEPT INCL DISEASES	07/31/25	08/06/25
80-02-8423	4-12	EXCLUSION - LOSS OF USE ELECTRONIC DATA	07/31/25	08/06/25
80-02-8425	1-14	EXCL-ALCOHOLIC BEVERAGE TYPE BUSINESSES	07/31/25	08/06/25
80-02-8530	1-16	EXCL - AIRCRFT/AUTOS/UNMAN AIRCRFT/WATERCRFT	07/31/25	08/06/25
80-02-8559	6-23	EXCL-ACCESS/DISCLOSE CONFID. PERS INFO. AI-PI	07/31/25	08/06/25
80-02-8756	10-10	DEFENSE WITHIN LIMITS - GL	07/31/25	08/06/25

CHUBB®

Liability Insurance

Declarations

Chubb Group of Insurance Companies
202B Hall's Mill Road
Whitehouse Station, NJ 08889

Named Insured and Mailing Address

CAMBRIDGE UNIVERSITY PRESS AND
ASSESSMENT
1 LIBERTY PLAZA, 20TH FLOOR
NEW YORK, NY 10006

Policy Number 9950-96-26 GAB

Effective Date SEPTEMBER 30, 2025

Issued by the stock insurance company indicated below, herein called the company.

GREAT NORTHERN INSURANCE COMPANY

Producer No. 0041860-99999

Producer AON RISK SERVICES NORTHEAST INC
7910 LEHIGH CROSSING #1
VICTOR, NY 14564-0000

Incorporated under the laws of INDIANA

Policy Period

From: JULY 31, 2025 To: JULY 31, 2026
12:01 A.M. standard time at the Named Insured's mailing address shown above.

Liability Coverage	Limit Of Insurance
GENERAL LIABILITY	
GENERAL AGGREGATE LIMIT (PRODUCTS AND COMPLETED OPERATIONS ARE SUBJECT TO THE GENERAL AGGREGATE)	$ 2,000,000
EACH OCCURRENCE LIMIT	$ 1,000,000
ADVERTISING INJURY AND PERSONAL INJURY AGGREGATE LIMIT	$ 1,000,000
DAMAGE TO PREMISES RENTED TO YOU LIMIT	$1,000,000
MEDICAL EXPENSES LIMIT	$ 10,000

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Liability Coverage *(continued)*	***Limit Of Insurance***	
EMPLOYEE BENEFITS ERRORS OR OMISSIONS		
AGGREGATE LIMIT	$ 1,000,000	
EACH CLAIM LIMIT	$ 1,000,000	
DEDUCTIBLE - EACH CLAIM		$ 1,000
RETROACTIVE DATE		JULY 31, 2021

RATING INFORMATION

STATE: NEW YORK

COVERAGE NAME:
PREM/OPS
CLASSIFICATION CODE NUMBER: 58456
CLASSIFICATION DESCRIPTION:
PUBLISHERS - BOOKS OR MAGAZINES - (FOR PROFIT)
(THIS CLASSIFICATION INCLUDES PRODUCTS/COMPLETED OPERATIONS)
PREMIUM BASIS:
GROSS SALES: $50,000,000

STATE: NEW YORK

EMPLOYEE BENEFITS

CLASSIFICATION CODE NUMBER: 00176
CLASSIFICATION DESCRIPTION:
EMPLOYEE BENEFITS E&O
PREMIUM BASIS:
NUMBER OF EMPLOYEES: 1

Chubb. Insured.℠

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Liability Insurance

Endorsement

Policy Period	JULY 31, 2025 TO JULY 31, 2026
Effective Date	SEPTEMBER 30, 2025
Policy Number	9950-96-26 GAB
Insured	CAMBRIDGE UNIVERSITY PRESS AND ASSESSMENT
Name of Company	GREAT NORTHERN INSURANCE COMPANY
Date Issued	SEPTEMBER 30, 2025

This Endorsement applies to the following forms:

GENERAL LIABILITY

Under Who Is An Insured, the following provision is added.

Who Is An Insured

Additional Insured - Scheduled Person Or Organization

Persons or organizations shown in the Schedule are **insureds**; but they are **insureds** only if you are obligated pursuant to a contract or agreement to provide them with such insurance as is afforded by this policy.

However, the person or organization is an **insured** only:

- if and then only to the extent the person or organization is described in the Schedule;
- to the extent such contract or agreement requires the person or organization to be afforded status as an **insured**;
- for activities that did not occur, in whole or in part, before the execution of the contract or agreement; and
- with respect to damages, loss, cost or expense for injury or damage to which this insurance applies.

No person or organization is an **insured** under this provision:

- that is more specifically identified under any other provision of the Who Is An Insured section (regardless of any limitation applicable thereto).
- with respect to any assumption of liability (of another person or organization) by them in a contract or agreement. This limitation does not apply to the liability for damages, loss, cost or expense for injury or damage, to which this insurance applies, that the person or organization would have in the absence of such contract or agreement.

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Liability Endorsement
(continued)

Under Conditions, the following provision is added to the condition titled Other Insurance.

Conditions

Other Insurance – Primary, Noncontributory Insurance – Scheduled Person Or Organization

If you are obligated, pursuant to a contract or agreement, to provide the person or organization shown in the Schedule with primary insurance such as is afforded by this policy, then in such case this insurance is primary and we will not seek contribution from insurance available to such person or organization.

Schedule

KNOX COUNTY PROCUREMENT DIVISION
SUITE 100
1000 NORTH CENTRAL STREET
KNOXVILLE, TENNESSEE 37917

All other terms and conditions remain unchanged.

Authorized Representative



CHUBB®

Policy Conditions

Schedule of Forms

Policy Period	JULY 31, 2025 TO JULY 31, 2026
Effective Date	SEPTEMBER 30, 2025
Policy Number	9950-96-26 GAB
Insured	CAMBRIDGE UNIVERSITY PRESS AND ASSESSMENT
Name of Company	GREAT NORTHERN INSURANCE COMPANY
Date Issued	SEPTEMBER 30, 2025

The following is a schedule of forms issued as of the date shown above:

Form Number	Edition Date	Form Name	Effective Date	Date Issued
80-02-9001	6-98	HOW TO REPORT A LOSS	07/31/25	08/06/25
80-02-9090	6-05	COMMON POLICY CONDITIONS	07/31/25	08/06/25
80-10-9106	4-94	NEW YORK MANDATORY - IMPORTANT NOTICE	07/31/25	08/06/25
80-10-9155	6-02	IMPORTANT NOTICE- DEFENSE WITHIN LIMITS	07/31/25	08/06/25
80-02-9716	1-14	NY MANDATORY - CANCELLATION AND NON-RENEWAL	07/31/25	08/06/25
80-02-9790	3-12	COND - CIVIL UNIONS OR DOMESTIC PARTNERSHIPS	07/31/25	08/06/25
80-02-9800	12-08	INSURING AGREEMENT	07/31/25	08/06/25
99-10-0732	1-15	NOTICE TO POLICYHOLDERS-TRIPRA	07/31/25	08/06/25
99-10-0792	9-04	IMPORTANT NOTICE - OFAC	07/31/25	08/06/25
99-10-0872	6-07	AOD POLICYHOLDER NOTICE	07/31/25	08/06/25

ATTACHMENT C
KNOX COUNTY PROCUREMENT DIVISION
INSURANCE CHECKLIST
REQUEST FOR PROPOSAL NUMBER 3688

THE CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGES & ENDORSEMENTS WITH "YES" AND ITEMS 20 TO 24.

REQUIRED:	NUMBER	TYPE OF COVERAGE	COVERAGE LIMITS
YES	1.	WORKERS COMPENSATION	STATUTORY LIMITS OF TENNESSEE
YES	2.	EMPLOYERS LIABILITY	$100,000 PER ACCIDENT $100,000 PER DISEASE $500,000 DISEASE POLICY LIMIT
YES	3.	AUTOMOBILE LIABILITY X ANY AUTO-SYMBOL (1)	COMBINE SINGLE LIMIT (Per-Accident) $1,000,000 BODY INJURY (Per–Person) BODY INJURY (Per-Accident) PROPERTY DAMAGE (Per-Accident
YES	4.	COMMERCIAL GENERAL LIABILITY	LIMITS
		CLAIM MADE X OCC	EACH OCCURRENCE $ 1,000,000
			FIRE LEGAL LIABILITY $ 100,000
			MED EXP (Per person) $ 5,000
		GEN'L AGGREGATE LIMITS APPLIES PER	PERSONAL & ADV INJURY $ 1,000,000
		POLICY X PROJECT LO	GENERAL AGGREGATE $ 2,000,000
			PRODUCTS-COMPLETED OPERATIONS/AGGREGATE $ 2,000,000
NO	5.	PREMISES/OPERATIONS	$1,000,000 CSL BI/PD EACH OCCURRENCE $2,000,000 ANNUAL AGGREGATE
YES	6.	INDEPENDENT CONTRACTOR	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE
NO	7.	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE)	$1,000,000 CSL BI/PD EACH OCCURRENCE $1,000,000 ANNUAL AGGREGATE
NO	8.	XCU COVERAGE	NOT TO BE EXCLUDED
YES	9.	UMBRELLA LIABILITY COVERAGE	$1,000,000
NO		PROFESSIONAL LIABILITY	
NO	10.	ARCHITECTS &ENGINEERS	$1,000,000 PER OCCURRENCE/CLAIM
NO		ASBESTOS & REMOVAL LIABILITY	$2,000,000 PER OCCURRENCE/CLAIM
NO		MEDICAL MALPRACTICE	$1,000,000 PER OCCURRENCE/CLAIM
NO		MEDICAL PROFESSIONAL LIABILITY	$1,000,000 PER OCCURRENCE/CLAIM
NO	11.	MISCELLANEOUS E & O	$500,000 PER OCCURRENCE/CLAIM
NO	12.	MOTOR CARRIER ACT ENDORSEMENT	$1,000,000 BI/PD EACH OCCURRENCE UNINSURED MOTORIST (MCS-90)
NO	13.	MOTOR CARGO INSURANCE	
NO	14.	GARAGE LIABILITY	$1,000,000 BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
NO	15.	GARAGEKEEPER'S LIABILITY	$500,000 COMPREHENSIVE $500,000 COLLISION
NO	16.	INLAND MARINE BAILEE'S INSURANCE	$
NO	17.	DISHONESTY BOND	$
NO	18.	BUILDERS RISK	PROVIDE COVERAGE IN THE FULL AMOUNT OF THE CONTRACT UNLESS PROVIDED BY OWNER.
NO	19.	USL&H	FEDERAL STATUTORY LIMITS

20. **Carrier rating shall be Best's Rating of A-VII or better or its equivalent.**

21. ***Notice of cancellation, non-renewable or material changes in coverage shall be provided to County at least 30 days prior to action. The words "Endeavor To" and "But Failure To" (to end of sentence) are to be eliminated from the notice of cancellation provision on standard accord certificates.***

22. **The County shall be named as an additional insured on all policies except Workers' Compensation and Auto. Endorsement Page(s) shall be submitted with each COI for the duration of the Contract term.**

23. **Certificate of Insurance shall show the RFP number and title.**

Insurance Agent's Statement and certification: **I have reviewed the above requirements with the Proposer named below and have advised the Proposer of required coverage.**

Agency Name: Aon Insurance Risk Services Northeast Inc **Authorizing Signature:** Daisy Honan

Proposer's Statement and Certification: **If awarded the Contract, I will comply with the Contract insurance requirements.**

Proposer's Name: Cambridge University Press & Assessment **Authorizing Signature:**

NEIL R. BURTON
Notary Public

Botanic House
100 Hills Road
Cambridge
CB2 1PH

Tel: 01223 222455
Email: neil.burton@mills-reeve.com

NOTARIAL CERTIFICATE

To: ALL TO WHOM THESE PRESENTS SHALL COME

I **NEIL ROGER BURTON** of 100 Hills Road, Cambridge, Notary Public duly authorised, admitted and sworn and practising within the United Kingdom of Great Britain and Northern Ireland do hereby certify that the electronic signature on the annexed document is a true likeness of **ANDREW WATSON's** signature (who is known to me).

I accept no responsibility for the contents of the annexed documents.

In witness whereof I have hereunto subscribed my name and affixed my seal of office this **07 October 2025** at Botanic House, 100 Hills Road, Cambridge, CB2 1PH, England

Signed:

.....

Neil R. Burton
Notary Public
My commission expires with life

Doc No: **CNB/533/2025**

ATTACHMENT D
AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, § 49-5-413

(To be submitted with proposer by contractor)

I, _____, president or other principal

Officer of _____, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated § 49-5-413, in effect at the time of this proposer submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

_____
President or Principal Officer

For: _____
Name of Company

STATE OF TENNESSEE}
COUNTY OF }

Subscribed and sworn before me by _____,

President or principal officer of _____,

On this _____ day of _____ 2_____.

_____
Notary Public

My Commission expires: _____

ATTACHMENT E
KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL
RFP 3688
ADVANCED ACADEMIC PROGRAMS

By submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature: 

(sign in blue ink)

Title: Finance Director Date: 03 October 2025

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each proposer and each person signing on behalf of any proposer certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each proposer is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature: 

(sign in blue ink)

Title: Finance Director Date: 03 October 2025

Equal Employment Opportunity

During the performance of this contract, the contractor agrees as follows:

(1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following:
Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.

(2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

(3) The contractor will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.

(4) The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the contractor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The contractor will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (8) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the administering agency may direct as a means of enforcing such provisions, including sanctions for noncompliance:

Provided, however, that in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the administering agency, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

Clean Air Act and Federal Water Pollution Control Act

Contractors and subcontractors will comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations

will be reported to the U.S. Department of Education (DOE) and the Regional office of the Environmental Protection Agency (EPA).

Debarment and Suspension
A contract award will not be made to a party listed on the governmentwide exclusions in the System for Award Management (SAM).

Lobbying
The Contractor certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the Contractor, to any person for influencing or attempting to influence an officer or employee of an agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with any contract, grant, loan, or cooperative agreement, the Contractor shall complete and submit Standard Form-LLL, “Disclosure Form to Report Lobbying," in accordance with its instructions.

c. The Contractor shall require that the language of this certification be included in the award documents for all contractors and that all subcontractors shall certify and disclose accordingly.
This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

Procurement of recovered materials.
Contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Preferences for Products Produced or Manufactured in the U.S.
(a) This contract award prefers the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

Exhibit B

Knox County Government

and

(Contractor)

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and (Contractor), hereinafter referred to as "Contractor."

Whereas, the County requested proposals for Advanced Academic Programs for Knox County Government (Request for Proposal #3688) and;

Whereas, Contractor submitted a proposal in accordance with said requested specifications, the response of which is the most responsible and responsive proposal meeting specifications accepted by the County;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in the Request for Proposal, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by the Request for Proposal specifications and the Contractor's proposal and response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. Terms of this Contract. This Contract commences on the 1st day of December 2025 and ends the 30th day of November 2026 unless terminated in conformity with the terms of this Contract as contained in paragraphs 5 and 6. The County intends to issue a one-year (1) award. Upon the mutual agreement of the vendor and the County, the award may be extended for four (4) additional years, one (1) year at a time. This may result in a total of five (5) years. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. Subcontracting/partnerships: Any subcontracting/partnerships must be approved, in advance, by both Knox County and Knox County Schools. Knox County and Knox County Schools may terminate the Contract if subcontracting/partnership is done without approval. All subcontractors/partners shall adhere to the same terms and conditions and will be required to sign the Criminal History Records Check and provide a current Certificate of Insurance, with all endorsement pages naming Knox County as additionally insured. This clause is only for those subcontractors that will be directly servicing the County account. It does not include a Contractor's cloud hosting services or other ancillary services not directly related to the services provided to the County.

3. Payment. Contractor warrants that the pricing shall remain firm for the initial one (1) year period. At the end of the first one (1) year period, and pursuant to the renewal terms in Paragraph 1, the Contractor may request price increases for each subsequent renewal. Price increases will only be given at the renewal time and must remain in effect for the next one (1) year term. No price increases will be given during the term of a

SAMPLE

Contract. The County shall pay the Contractor the amount as agreed upon in the County's Request for Proposal for Advanced Academic Programs per the Contractor's response to Request for Proposal #3688 and negotiations;

[TBD]

pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Contractors are advised that Knox County requires a minimum of thirty (30) days is required to process invoices for payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, vendor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

4. Inspection and acceptance: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. Such acceptance shall occur within a minimum of 60 days of receipt of materials and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

Final acceptance shall occur upon written notification by the County to proceed or by the issuance of a Purchase Order.

5. Termination. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

In the event Contractor intends to interrupt or discontinue service under this Contract, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem as soon as possible. Failure to correct the problem(s) in a timely manner or repeated issues occurring with the service(s) to be provided, may lead to the termination of the Contract by the County.

6. Appropriations. In the event no funds are appropriated by the County for Advanced Academic Programs in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

7. Contractor Default: Knox County reserves the right, in case of vendor default, to procure the goods or services from other sources. Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidders list for twenty-four (24) months.

8. Independent contractor. Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability resulting from actions of the Contractor or Contractor's employees.

9. Compliance with all federal, state, and municipal laws. Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Advanced Academic Programs, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

10. Criminal history records check: Any and all successful vendors, vendor employees, and any vendor sub-contractors and its employees that perform any services at Knox County Schools must submit to a Criminal History Records Check at vendor's expense. This is conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the employee to have contact with students or enter school grounds when students are present. Reference Tennessee Code Annotated Section 49-5-413.

11. Severability clause. If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

12. Prohibition against assignment. Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

13. This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

14. Right to inspect. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP and Part 6 of the Federal Funding Requirement, the County reserves the right to make periodic inspections of the manner and means the services are performed.

15. Nondiscrimination and non-conflict statements. Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

16. Books and records. Pursuant to Paragraph 7 of this agreement, Section 2.4 of the RFP, and Part 6 of the Federal Funding Requirements, Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding

of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

17. **Contractor** shall indemnify, defend, save and hold harmless Knox County, its officers, agents and employees from all third-party suits, claims, actions or physical damages of any nature brought because of, arising out of, or due to any alleged breach of the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any grossly negligent act or occurrence or any intentional omission or commission of Contractor, its subcontractors, suppliers, agents or employees. Notice of any claim will provided to the Contractor. Neither party shall be liable for consequential or incidental damages, and to the extent permitted by applicable law, except for a party's indemnification obligations or breach of confidentiality, each party's maximum liability for direct damages under this contract shall not exceed the amount paid by District to Contractor hereunder.

18. **Delivery.** Contractor shall render the Advanced Academic Programs for the County in accordance with Request for Proposal #3688.

19. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its proposal and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

20 **News releases by vendors:** As a matter of policy, Knox County does not endorse the services of a Contractor. Pursuant to Knox County Board of Education Policy C-180, a Contractor will not make any posts or news releases concerning any resultant contract from this solicitation without the prior written approval of Knox County and the Knox County Board of Education.

21. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

22. **Warranty and Remedies:** Contractor warrants to Knox County that all items delivered, and all services rendered, will be fit for the particular purpose purchased, of merchantable quality, and of good workmanship. Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to, rejection of goods, rescission, right offset and right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

23. **Technology Restrictions on Use of Confidential Information**

23.1 Any and all personally identifiable student or employee information including but not limited to name, address, telephone number, teachers, classes, grades, digital media and any other student or employee information of any kind is deemed confidential and shall not be released or disclosed in any form or manner unless authorized by District in writing, or as needed to provide services under this Agreement, including for rostering students. This restriction against release or disclosure also precludes sharing of data by Contractor with any affiliate of Contractor unless such sharing is expressly permitted under the contract or is expressly granted in writing by District. In addition, all information the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the

Family Educational Rights and Privacy Act (referred to herein as "FERPA") and all applicable laws of the State of Tennessee which is obtained by Contractor from District, its students, faculty, or staff in the performance of this Agreement constitutes Confidential Information. Contractor agrees to hold the Confidential Information in strictest confidence. Contractor shall not use or disclose Confidential Information received from or on behalf of District or any of its students, faculty, or staff except as permitted or required by this Agreement, or otherwise as agreed in writing by District.

23.2 Contractor agrees that any personally identifiable student data it obtains from the District shall only be used for the purpose of providing the contracted product or service to the District according to the terms of the contract. Contractor may not sell student data. (This does not prevent transfer of student data by purchase or merger of the Contractor, so long as the successor entity remains bound by and in compliance with the terms of this agreement.)

23.3 Contractor may not use personally identified student data for any secondary purpose including targeted advertising. Contractor may (a) use student data for adaptive learning or customized student learning processes; (b) market an educational application to a student's parent or guardian if Contractor did not use student data shared by or collected on behalf of the District to do so; (c) use a recommendation engine within Contractor's internal application to recommend learning or employment related content or services to the student, but only if the recommendation is not motivated by consideration from another party; (d) respond to a student request for information or feedback, but only if the response is not motivated by consideration from another party; (e) use student data to allow or improve functionality of Contractor's internal application; and (f) identify for the student nonprofit institutions of higher education or scholarship providers that are seeking students who meet specific criteria, but only if Contractor obtains, through the District, the written consent of the student's parent or guardian (or the student if age 18 or older or emancipated). (Written consent may not be required in certain instances for a Contractor which is a national assessment provider.) Data that does not identify or provide a reasonable basis to identify an individual ("De-Identified Data") is not deemed Confidential Information and Vendor may use De-Identified Data in accordance with all applicable laws.

23.4 Contractor agrees that it will protect the Confidential Information it receives according to commercially acceptable standards and no less rigorously than it protects its own Confidential Information. Specifically, Contractor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentially, integrity, and availability of all electronically maintained or transmitted Confidential Information. Any data that is transmitted to/from District will be secure. Any electronic data stored by the vendor must be secure and backed up with a tested data recovery strategy in place as approved by District.

23.5 Within 30 days of termination, cancellation, expiration, or other conclusion of the contract, or within 30 days of a request by District with regard to any portion of the data, Independent Contractor Vendor shall return to District or if return is not feasible, destroy delete and not retain any copies of any and all Confidential Information that is in possession of Contractor and certify in writing that all copies of the confidential information in its possession have been destroyed deleted. This requirement shall not apply, and Contractor may retain, personally identifiable student data if Contractor has obtained written consent of the student's parent or guardian (or from the student if 18 or older or emancipated) and provides documentation of that consent to the District,

23.6 These obligations shall not apply to any information which (a) is already in the public domain through no breach of this Agreement, including but not limited to information available through schools' web site(s); (b) was lawfully in Independent Contractor's Vendor's possession prior to receipt from an District school, its faculty staff or students; or (c) is received by Independent Contractor Vendor independently from a person or entity free to lawfully disclose such information other than an District school, its faculty, staff, or students.

23.7 Contractor warrants and represents that it shall, at all times, comply with the terms of this Agreement and with FERPA, COPPA, and all applicable laws of the state of Tennessee and further agrees not to disclose or re-disclose to any person or entity for any purpose whatsoever any personally identifiable student information as that term is defined by this agreement, FERPA, COPPA, or applicable laws of the state of Tennessee.

23.8 Contractor agrees that District or its designee may, upon request, audit Contractor to verify compliance with the applicable requirements of law.

24. Contract documents. It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Request for Proposal #3688, for Advanced Academic Programs and Addendum I
B. Contractor's Response to Request for Proposal #3688, to include any supplemental agreements, Terms and Conditions, etc., for Advanced Academic Programs and Addendum I

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY BOARD OF EDUCATION

This document is approved by the Knox County Board of Education on the _____ day of _____, 20____, as reflected in its minutes, and certified by its Chairperson.

_____ _____
BOARD CHAIR – Signature **BOARD CHAIR- Printed Name**

Date:_____

KNOX COUNTY GOVERNMENT

_____ GLENN JACOBS
MAYOR – Signature **MAYOR**

Date:_____

SAMPLE

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO._____
APPROVED AS TO LEGAL FORM

KNOX COUNTY, TENNESSEE

_____
LAW DIRECTOR – Signature

_____
LAW DIRECTOR – Printed Name

Date:_____

CONTRACTOR

_____
AUTHORIZED SIGNATURE

_____
CONTRACTOR – Printed Name

(CONTRACTOR)
COMPANY NAME

Date:_____

SAMPLE

OFFICE OF COUNTY MAYOR GLENN JACOBS

Procurement Division, 1000 N. Central Street, Suite 100, Knoxville, TN 37917

ATTACHMENT A
KNOX COUNTY PROCUREMENT DIVISION
COST
REQUEST FOR PROPOSAL NUMBER 3688

It is the intent of Knox County and Knox County Schools to use the following scenario to fairly evaluate each proposer's cost to fully implement an advanced academic program. The total cost provided should be inclusive of any and all costs associated with full implementation of the advanced program.

Scenario: To fully implement and demonstrate mastery of an English or World Language advanced academic program for one school year. In this scenario there are five middle school teachers and one hundred twenty-five middle school students participating in the advanced program. Additionally, there are seven high school teachers and two hundred fifty high school students participating in the program. The minimum requirement for training and professional development for all teachers implementing the program is a two-day on-site training, seven hours per day and three days of virtual training, seven hours per day. The vendor is to determine the number of consultants required to carry out the minimum expectations, and the cost should be inclusive of all travel charges for the on-site professional development.

Proposers must thoroughly address all costs associated with the implementation of the English or World Language advanced academic program. In addition to providing a total cost for all charges that would be associated with the advanced academic program, proposers must provide a complete breakdown of those charges. The costs may include, but not be limited to the following:

- Any and all fees associated with the program which may include, but not be limited to application, annual and/or system fees for the students, classrooms, schools and/or courses.
- Training/ Professional Development charges for full implementation of the advanced academic program meeting the minimum requirement. The proposal should encompass the number of consultants believed necessary to carry out the work required in the scenario. All travel charges for the consultants should be included in the cost.
- Digital resources that the teachers and/or students would need to fully implement the program.
- Print resources that the teachers and/or students would need to fully implement the program (Shipping Charges are to be included in the cost).
- Exams or Essay costs for students to show mastery of the advanced program (Shipping Charges are to be included in the cost).
- Software Services

Total cost for the scenario: $_____

Note: Proposers must also include an itemized list of all products and services offered to Knox County and Knox County Schools with a description and unit price. For professional development services the description should specify the number of participants allowed per consultant. Should the proposal result in a contract the pricing proposed on the itemized list must remain firm for the first year of the contract. Anything not listed on the itemized list of products and services will not be considered part of the contract. The unit price must include all shipping charges for products and travel charges for on-site trainings and professional development. Everything listed on the scenario breakdown should be found on the complete itemized list. While this scenario will only be used for evaluation purposes, the cost should be accurate and include all costs associated with full implementation of the advanced academic program proposed. The County will not pay any hidden costs, shipping charges, or additional travel charges for consultants should the proposal result in a contract. Knox County and Knox County Schools does not guarantee any quantity of products or services will be purchased. Services will be utilized on an as needed basis. Knox County reserves the right to award this proposal on an all-or-none basis, schedule basis or by multiple awards. Knox County reserves the right not to award this proposal.

Failure to provide this cost sheet in your response will be considered during the evaluation process and may be just cause to deem your submittal non-responsive.

Tab VI: Proposed Costs

TAB VI: PROPOSED COSTS 1

METHOD 2
PRICING FOR ANNUAL FEES AND ASSESSMENTS IN ACCORDANCE WITH 3.26 3
Fees *3*
School Registration Fee 3
Annual Secondary and Advanced School Fee 3
Assessment Fees 4
Training and Professional Development Fees 4
Textbooks 5
Optional Additional Services Provided by Cambridge International 7
Assumptions *6*

TAB VI Proposed Costs

In response to the updated requirements outlined in Addendum I, our cost proposal has been developed using a scenario-based approach that ensures transparency, accuracy, and full alignment with Knox County's expectations. The scenario provided by the County outlines a one-year implementation of an English or World Language advanced academic program involving five middle school teachers and 125 students, as well as seven high school teachers and 250 students. The professional development component includes two days of on-site training and three days of virtual training, each consisting of seven instructional hours per day.

To meet these expectations, we have calculated a comprehensive total cost that includes all necessary components for full program implementation. This includes application and system fees, training and professional development (inclusive of trainer travel), digital and print instructional resources, assessment materials, and any required software services. Our pricing reflects the number of trainers we believe are necessary to deliver the required training effectively, and all associated travel and shipping costs are included in the total.

In addition to the total cost scenario, we have provided a detailed itemized list of all products and services offered to Knox County and Knox County Schools. Each item includes a description, unit price, and—where applicable—the number of participants included. This list is intended to serve as the definitive reference for all pricing under the contract. Any item not included in this list will not be considered part of the agreement.

All pricing is fixed for the first twelve (12) months of the contract term, as required by the amended Section 3.29. No cost increases will be permitted during this period. Any future price adjustments must be submitted in writing at the time of renewal and must include a clear justification and supporting documentation. The County reserves the right to accept, negotiate, or reject such requests.

This methodology ensures that our proposal is both fiscally responsible and fully compliant with the County's procurement standards. It also reflects our commitment to providing a high-quality, turnkey solution with no hidden costs or unanticipated charges.

Cambridge will work with Knox County to make sure invoices are detailed sufficiently for purposes of payment. Explanation of supporting documentation might be included with an invoice upon awarding of contract as outlined in Tab VIII: Exceptions.Table 1.

Table 1. Cambridge Price List Attachment A

Attachment A: Scenario Price List Alignment				
Category	**Description**	**Quantity**	**Unit Cost**	**Total Cost**
Application Fee	One-time per school	1	$3,822.00	$3,822.00
HS Annual Program Fee	Annual program fee per high school	1	$11,302.00	$11,302.00
MS Annual Program Fee	Annual program fee per middle school	1	$5,515.00	$5,515.00
AS/A Level Exams (including shipping)	250 students × 2 exams	500	$128.30 (includes estimated $3.50/exam shipping)	$64,150.00
Lower Secondary Checkpoint	Per candidate per subject (English only)	125	$48.50 (includes estimated $3.50/exam shipping)	$6,062.50
On-site Training (2 days)	**Focus on Assessment (IGCSE and Advanced) or Progress (PLS)** Face-to-face private course (Max 30 participants)	1 (flat fee)	$13,085.00 (travel is included in price)	$13,085.00
Virtual Training (3 days)	Virtual private course (Max 30 participants) *note additional training options are available and itemized in this document. We recommend KCS budgets for at least one virtual and one in-person training in alignment with the scenario provided and standard implementation best practices.	1 (flat fee)	$3,865.00	$3,865.00
Print/Digital Resources	3 sets per high school (30 books/set)	90	$75.00	$6,750.00
Total Estimated Cost				**$114,551.50**
*Note: Additional training options are available and itemized in this document. We recommend KCS budgets for at least one virtual and one in person training in alignment with the scenario provided and standard implementation best practices				

Pricing for Annual Fees and Assessments

School Application Fee

Before a school can offer our programs and qualifications, they must complete our registration process, which includes an approval visit.

Annual Secondary and Advanced School Fee

Cambridge operates on a fiscal year from October 1 to September 30. Schools that exceed an annual spend of $19,013.00 in the preceding fiscal year are eligible for a waiver of the annual programming fee. This spend includes diploma entry fees, exam fees for AS/A Level and IGCSE, and Cambridge training fees. For context, ordering more than 144 exams typically qualifies a school for the waiver. Most mid-size to large secondary schools meet this threshold once they begin administering Cambridge exams.

Assessment Fees

The first KCS students would sit for assessments at the end of 2026 school year. Costs related to assessment include:

- AS/A Level Exam Fee, assessed per student taking each AS/A Level exam (except for GP&R)
- AS/A Level GP&R Exam Fee, assessed per student taking each AS Level exam
- AICE Diploma Fee, assessed per student entering for the AICE diploma

Training and Professional Development Fees

Fees listed in Table 2 apply to the 2025–26 calendar year. Cambridge will review the fee structure annually to ensure it continues to support high-quality training. Professional development is optional but strongly recommended, as it is associated with improved implementation and student outcomes. The number of teachers requiring training may vary annually, and pricing is subject to change based on course format and delivery.

At this time, any Cambridge school or district that we work with can host a training within their district, if they meet the minimum participant thresholds (minimum participant thresholds vary but can be set as low as 5-7 attendees per training course). This is accommodated based on need, timing, and availability of trainers for the specific subject areas requested. We believe in our teacher support model, and we try to remain flexible and do what works best for schools by bringing training to the district to take pressure off of travel and substitute teacher costs.

Although we try and accommodate as many requests as feasible, in the event we cannot accommodate a specific request, we will provide alternate locations for face-to-face or on-line professional development opportunities to meet the needs of the school/district.

Courses are available in face-to-face, virtual, and online formats. Each course has early bird and regular pricing, as well as private course options for up to 30 participants. Examples include:

- *What a Cambridge Classroom Looks Like*: A 4-hour course introducing active learning, assessment for learning, metacognition, and inclusion. Explore what these approaches look like in practice and start building a practical toolkit of strategies.
- *Introduction Course*: Designed for teachers new to Cambridge or a specific syllabus. More information can be found on our website.
- *Focus on Teaching*: Explores specific areas of pedagogy within a subject-specific syllabus. More information can be found on our website.
- *Focus on Assessment (IGCSE and Advanced) or Progress (PLS):* Deepens understanding of assessment practices.

- *Marking Workshops*: Builds confidence in assessing student work.
- *Improving Speaking*: Supports language teachers in enhancing speaking instruction.
- *Enrichment Courses*: Helps educators and leaders transform their teaching approach. We design our Enrichment courses to be dynamic and engaging. Our experienced trainers encourage teachers and leaders to reflect on their professional practice and help them to develop practical strategies they can use in their schools. Participants are also encouraged to share ideas and learn from other members of the Cambridge International community. Each course focuses on a specific skill or concept in teaching and learning. For example:
    - Active Learning and Assessment for Learning
    - Metacognition: Boosting Students' Learning
    - Effective Talk and Questioning
    - Responsive Education for All Learners

Some courses also concentrate on a particular subject or syllabus. More information can be found on our website.

Table 2. Optional Training and Professional Development Fees

Costs associated with each optional training are as follows:

What a Cambridge Classroom Looks Like			
Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$518.00	$576.00	$11,915.00
Virtual	$168.00	$210.00	$3,865.00
Online	$168.00	$210.00	$3,865.00
Introduction Course			
Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$284.00	$316.00	$6,540.00
Virtual	$96.00	$120.00	$2,210.00
Online	$112.00	$140.00	$2,575.00
Focus on Teaching			
Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$284.00	$316.00	$6,540.00
Virtual	$96.00	$120.00	$2,210.00

Online	$112.00	$140.00	$2,575.00
Focus on Assessment (IGCSE and Advanced) or Progress (PLS)			
Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$569.00	$632.00	$13,085.00
Virtual	$136.00	$170.00	$3,130.00
Online	$112.00	$140.00	$2,575.00
Marking Workshops			
Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Virtual *per component	$80.00	$100.00	$3,195.00
Online	$112.00	$140.00	$2,575.00
Improving Speaking			
Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Online	$168.00	$210.00	$3,865.00
Enrichment Courses			
Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$548.00	$609.00	$12,605.00
Virtual	$168.00	$210.00	$3,865.00
Online	$168.00	$210.00	$3,865.00

Print and Digital Resources

The purchase of our print and digital resources is not a requirement of Cambridge programming and is considered optional. Evidence from our current schools suggests that schools that use resources have a greater fidelity of implementation, so while not required, they are recommended. Many of our schools like to have at least one classroom set of resources to support student learning. For this reason, Cambridge has provided a list of approved resources on our website www.cambridgeinternational.org for

districts/schools to peruse. For the purpose of this solicitation, it was estimated that each class would have 30 students. Cambridge print and digital resources are bundled with each print/digital resource bundle having the unit price of $75.00. The initial implementation year budgeted for 3 complete sets of print resources per high school. Each subsequent year budgeted for 3 more complete sets of print/digital bundled resources per high school to support the additional courses that will be added by each school.

Optional Additional Services Provided by Cambridge International

Cambridge offers additional optional resources for schools that we have not included in the scenario above. These are listed in Attachment A but are not included in Table 4.

Digital Mocks Exams are practice digital exams for Pre-Advanced and Advanced courses that are typically offered in January. They are marked by Cambridge and provide feedback for instructional preparation for the actual exam.

Cambridge Insights are curriculum-independent assessments built on data from over 650,000 learners annually. These tools help KCS educators: identify student potential and learning needs; provide actionable insights for personalized instruction; and predict future academic performance. Specifically MidYIS identifies middle school students' readiness for our Pre-Advanced (IGCSE) exams and is typically offered in 8th grade to assist with placement in high school. For high school students, Yellis identifies learning needs and supports achievement on Pre-Advanced IGCSE performance, and Alis identifies needs and predicts performance on AS/A Level exams. The current fees for these assessments are listed below.

Table 3. Cambridge Insight (Optional Resource)

Product	Price per student
MidYis & Yellis	
Product fee	$202.00
1-100 students	$15.00 per student
Next 101-175	$11.40 per student
Next 175+	$7.80 per student
ALIS	
Product fee	$265.00
1-60 students	$12.10 per student
Next 61-120	$7.80 per student
Next 121+	$5.40 per student

Cambridge Assessment International Education

Cambridge International AS & A Level
A guide for universities

Cambridge International AS & A Levels are recognised as a passport to success in education, university and employment.

What are Cambridge International AS & A Levels?

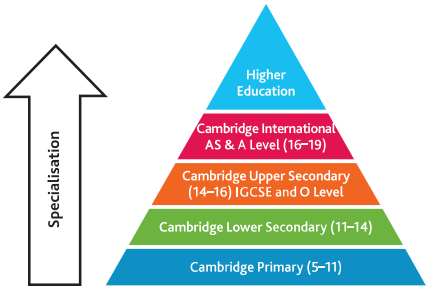
Cambridge International Advanced Subsidiary Levels (AS Levels) and Cambridge International Advanced Levels (A Levels) are subject-based qualifications usually taken in the final two years of high school. Cambridge International AS Level is typically a one-year programme of study, while Cambridge International A Level typically takes two years. Assessment takes place at the end of each programme.

Most subjects can be started as a Cambridge International AS Level and extended to a Cambridge International A Level. The syllabuses are international in outlook but retain local relevance. They have been created specifically for an international student body with content to suit a wide variety of schools and avoid cultural bias. The contexts or examples used in syllabuses and exam question papers are culturally sensitive in an international context.

Offered since 1951, these qualifications are administered by Cambridge Assessment International Education, a part of the University of Cambridge.

Who takes Cambridge International AS & A Levels?

Aimed at 16–19 year old students before university study, Cambridge International AS & A Levels are taken by over 175 000 students in more than 125 countries every year. In the UK these are taken in years 12 and 13 of the secondary school curriculum.



Why choose Cambridge International AS & A Levels?

Develop unique skills

The qualifications aim to develop students' knowledge, understanding and skills through:

- in-depth subject content
- learning to work independently
- applying knowledge and understanding to new as well as familiar situations
- handling and evaluating different types of information sources
- thinking logically and presenting ordered and coherent arguments and explanations
- studying and communicating in English.

Flexible subject choices

A wide choice of over 50 subjects is available and schools have the freedom to offer them in almost any combination. There are no compulsory subjects and students are free to specialise or study a range of subjects.

Giving students the power to choose helps to motivate them throughout their studies. Students typically study four subjects at AS Level and three subjects at A Level. The standard admission requirement for UK universities is three A Levels.

Cambridge International AS & A Level subject groups		
English	Mathematics	Science
Languages	Humanities	Technology
Social Sciences	The Arts	General Studies

“Students we have who have taken Cambridge International A Levels do very well at our campus. They are very well-prepared for our curriculum and we find that they have a lot of confidence, but also that they have a good, deep subject knowledge, [and] the ability to think critically and well.”

Stuart Schmill, Dean of Admissions, Massachusetts Institute of Technology (MIT), USA

Global Perspectives & Research

A pioneering skills-based qualification, Global Perspectives & Research (GPR), has been added to complement the existing suite of Cambridge International A Levels. GPR uses a cross-curricular approach to learning the skills needed for success in higher education and at work. By studying global issues, students explore different and often opposing perspectives to develop their ability to deconstruct, reconstruct and reflect on how this impacts their own perspectives. The programme of study is comprised of a taught skills course in the first year and in the second year, a year-long research report called the Cambridge Research Report. The Research Report promotes the application and development of the skills taught in Global Perspectives and helps prepare students to cope with the demands of university study. For more information visit **www.cambridgeinternational.org/gp**

In-depth preparation for universities

Findings from a number of research studies suggest that the Cambridge curriculum prepares students well for university. For more information visit **http://files.eric.ed.gov/fulltext/EJ962510.pdf**

Grading and assessment

Cambridge's internationally recognised grades are reported with clear guidelines to explain the standards of achievement. The Cambridge International A Level is reported on a grade scale from A* (highest) to E (minimum required performance). There is no A* grade for Cambridge International AS Levels, which are reported from grade A to E. Each subject is graded separately and no Grade Point Average is calculated. Separate certificates are issued for each examination series. Grades are awarded only for subjects that candidates pass.

Percentage Uniform Mark

The Percentage Uniform Mark (PUM) is a numerical mark provided for some countries alongside grades for each subject. It transfers a candidate's results to a common scale which reports how well they performed within that grade. For example if a candidate achieves a Percentage Uniform Mark of 79 then they are at the top end of a B grade.

AS Level grade	PUM range
a	80–100
b	70–79
c	60–69
d	50–59
e	40–49

A Level grade	PUM range
A*	90–100
A	80–89
B	70–79
C	60–69
D	50–59
E	40–49

Staged and linear assessment

Option one

Cambridge International AS Level (standalone AS)

Students take the Cambridge International AS Level only. The syllabus content for Cambridge International AS Level is half of a Cambridge International A Level programme.

Option two

Cambridge International AS Level (AS is first half of A Level)

Cambridge International A Level (remainder of A Level)

Students take the Cambridge International AS Level in Year 1 and in Year 2 complete the Cambridge International A Level.

Option three

Cambridge International A Level

Students take all papers of the Cambridge International A Level course in the same examination series, usually at the end of the second year of study.

Cambridge AICE Diploma

A group certificate is awarded for passing examinations in subjects drawn from three curriculum areas within Cambridge International AS & A Level. Curriculum areas include mathematics and science, languages, and arts and humanities. Each AS Level is awarded 1 credit and a full A Level is awarded 2 credits. From 2017, students are required to achieve a minimum of 7 credits, including the AS in Global Perspectives & Research as a compulsory subject. The AICE Diploma is taken primarily in the USA. For more information visit **www.cambridgeinternational.org/aice**

> **"We have been impressed by the depth and breadth of knowledge exhibited by Cambridge students. They arrive on campus well-prepared and excited about learning, regardless of where they come from in the world."**
>
> **Greg Roberts**, Dean of Admissions, University of Virginia, USA

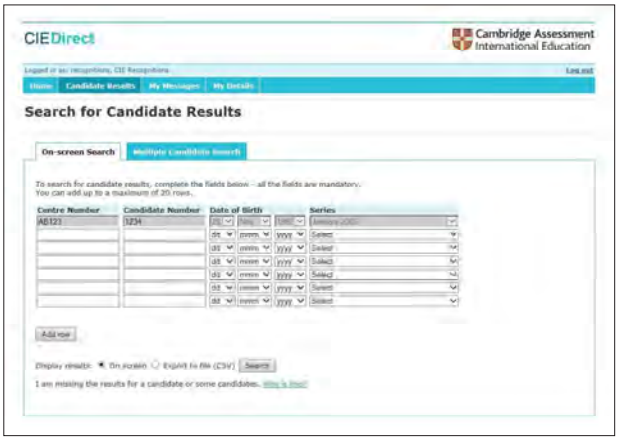
Assessment methods – Sample certificate and statement of results



Both the certificate and statement of results are evidence of official results from Cambridge. Other hidden security features are also present on official Cambridge documentation.

Cambridge International Direct

Direct allows universities and institutions to verify applicants' Cambridge results online. To apply for access please email **recognitions@cambridgeinternational.org**



Who recognises Cambridge International A Levels?

Cambridge qualifications are recognised by universities and employers worldwide. Cambridge International AS & A Levels are recognised by UCAS, UK universities and institutions overseas as equivalent in standard and grade to the AS and A Levels taken by students in the UK.

Students use Cambridge International AS & A Levels to gain places at leading universities worldwide including the UK, Ireland, USA, Canada, Australia, New Zealand, India, Singapore, Egypt, Jordan, South Africa, the Netherlands, Germany and Spain. In countries such as the United States and Canada, good grades in carefully chosen Cambridge International A Level subjects can result in up to one year of university course credit.

Examples of worldwide recognition

Yale University recognises Cambridge International A Levels for matriculation purposes. Credit is awarded for grades A or B. Students enrolled in A Level programmes may use completed A Level results as a substitute for the SAT II Subject Tests on a one-for-one basis. Yale gives credit for A Levels once they are approved by the student's academic advisor.

University of Oxford welcomes students with Cambridge International A Levels. Oxford has for many years accepted the Cambridge International A Level as a suitable qualification to meet the conditions for entry to the collegiate university. The qualifications provide students with suitable subject knowledge, although the competitive nature of applications means that success in A Levels alone does not automatically result in an offer.

National University of Singapore welcomes applications from students holding a good pass in at least three Cambridge International A Levels. Many applicants submit good passes in four or more A Levels. A total of all subject grades in two sittings taken within 12 months of each other is allowed.

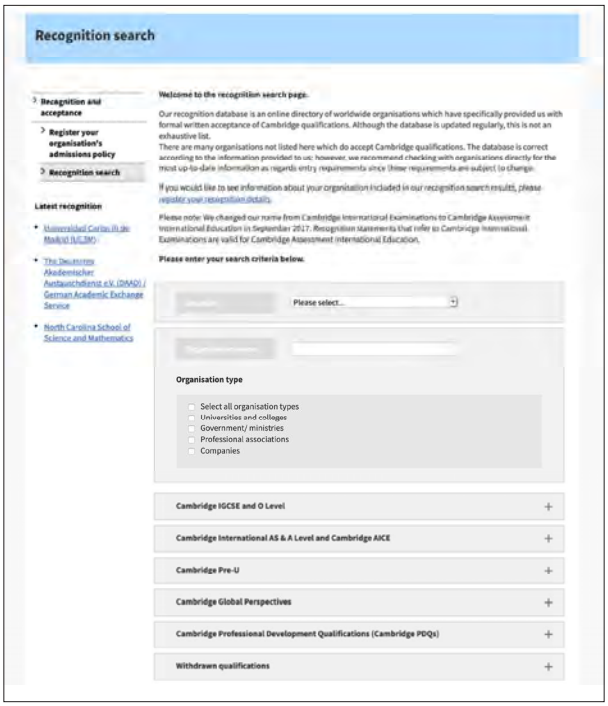
University of Sydney welcomes applicants who achieve a minimum of three full A Level subjects in one academic year. Very competitive courses may need four subjects for admission. AS subjects will not be accepted in place of A Level subjects, but results in AS subjects may improve the competitiveness of qualified applicants.

> **"We welcome applications from candidates with Cambridge International qualifications. Our experience is that Cambridge Advanced qualifications such as Cambridge International AS & A Levels are consistently robust and reliable, and prepare students very well for higher education."**

Katherine Hind, Senior Undergraduate Admissions Manager, Newcastle University, UK

The recognition database

The recognition database is an online directory of worldwide institutions that have given formal written acceptance of Cambridge qualifications. It is regularly updated with new recognition statements allowing Cambridge students to see where their Cambridge qualifications are accepted. It is the first place for students, parents and schools to check whether a particular institution would consider an application from a student holding Cambridge qualifications. Students then visit the university's own website for further details.



Cambridge International A Level policies are listed on our database. Add yours by following the link from **www.cambridgeinternational.org/recognitionsearch**

An informative recognition policy on our database can really set your university apart.

Learn more! Full details of all entrance requirements for Cambridge International AS & A Level can be found on our website at **www.cambridgeinternational.org/recognition**

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CAMBRIDGE

International Education

University recognition worldwide

Guide to the recognition and acceptance of Cambridge qualifications



www.cambridgeinternational.org/recognition-search

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University recognition worldwide

Cambridge qualifications are accepted by universities all around the world. Many universities have sent us official statements confirming their entry policies, and you can find examples from some of the most popular destination countries for Cambridge students on the following pages. For full details of all the official statements listed and many others, check our recognition database at cambridgeinternational.org/recognition-search

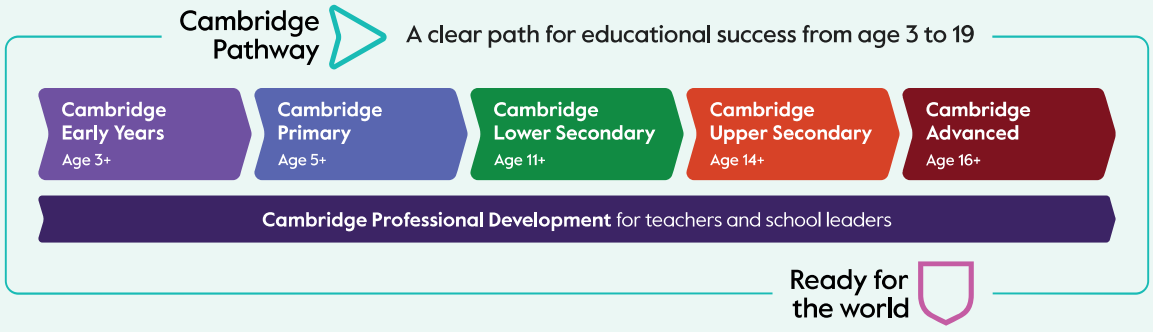
Many more universities than just those listed on the database will also be happy to accept Cambridge qualifications upon application as proof of your academic ability. However, before you apply to any institution, it is essential that you check the exact entry requirements for your selected course(s) on the university website and then check with the university's admissions office if you still have any queries. You will also need to be aware of any language requirements in addition to the academic entry standards. It is very important to remember that university entry is always competitive so achieving the minimum entry requirements is not a guarantee of admission; the higher your grades and the stronger your application documents, the better your chance of being accepted on your chosen course.

About us

We prepare school students for life, helping them develop an informed curiosity and a lasting passion for learning. We are part of the University of Cambridge.

Our Cambridge Pathway gives students a clear path for educational success from age 5 to 19. Schools can shape the curriculum around how they want students to learn – with a wide range of subjects and flexible ways to offer them. It helps students discover new abilities and a wider world, and gives them the skills they need for life, so they can achieve at school, university and work.

Cambridge programmes and qualifications follow a student-centred approach and are a global passport to success in education, university and the workplace. Subject content is multicultural and a wide range of subjects is available, including many country-specific courses. Our global learning community of Cambridge schools, teachers and students brings people closer together to share best practice and ideas and drive excellence in education. Together with schools, we aim to develop Cambridge students who are confident, responsible, reflective, innovative and engaged.



Recognition in Asia

Recognition of Cambridge qualifications is growing fast throughout Asia, where they are well known. It is important to carefully check the entry requirements and admissions processes well ahead of making an application, as university admission procedures and entry tests can vary widely across countries or states in this region. This section gives some examples of countries that welcome students holding Cambridge qualifications.

India

Cambridge qualifications have long been recognised by the Association of Indian Universities (AIU) www.aiu.ac.in and this information is available in the 'Equivalence of Foreign Degrees' document published by AIU. Universities and colleges in India follow the equivalence requirements laid down by AIU.

For courses in humanities, liberal arts and sciences, typical eligibility requirements are three Cambridge International A Levels. However, for some courses two Cambridge International A Levels are sufficient. For engineering and medicine, subject-specific requirements are decided by regulatory councils and common entrance exam bodies, and generally require more than three Cambridge International A Levels. You need to meet the same eligibility requirements as students applying with national qualifications.

Institutions are free to set separate eligibility conditions that are over and above equivalence requirements. Admission to courses can be competitive where institutions have limited numbers of places available.

You should ensure that your choice of Cambridge International A Level subjects is suitable for your intended degree course, especially if you have a specific career path in mind and plan to apply to a wide range of universities to maximise chances of acceptance.

'Destination India: Using Your Cambridge Qualifications to Study in India' is available on our website.

Association of Indian Universities

Minimum two or three passes at Cambridge International A Level has been equated with Grade 12 of an Indian exam board.

- Students need to complete a minimum of 12 years of schooling.
- Subject-specific eligibility is decided by admitting universities as per their existing rules, and in case of professional examinations as per the conditions laid down by the respective councils.
- For entry to medicine, students are required to have studied the subject of English at AS Level.
- No other subjects at AS Level are acceptable.

This recognition statement and others from India can be found on the recognition database.

Pakistan

The Inter Board Committee of Chairmen (IBCC), Ministry of Education, decides and grants equivalence to foreign qualifications with corresponding Pakistani certificates.

It is absolutely essential to check information on admission criteria with the admissions office of the university you are applying to, as advertised entry requirements can change. For further information, please refer to Destination Pakistan: 'Where Will a Cambridge Qualification Take You? Guide to the Recognition and Acceptance of Cambridge Qualifications in Pakistan' (available on our website) or see the IBCC website: www.ibcc.edu.pk

Inter Board Committee of Chairmen

The Inter Board Committee of Chairmen (IBCC), Ministry of Education, states that Cambridge O Level /IGCSE and International A Level and 12/13 years of schooling is considered equivalent to Higher Secondary School Certificate (HSSC/Intermediate), subject to meeting the specified requirements of the four individual groups: Pre-Medical Group, Pre-Engineering Group, General Science Group or Humanities Group. Further information is available on the IBCC website at www.ibcc.edu.pk or from one of the four offices: Lahore, Karachi, Peshawar, Quetta.

This recognition statement and others from Pakistan can be found on the recognition database.

Hong Kong

Cambridge qualifications are well known by universities in Hong Kong. Minimum requirements for application are often three A Level passes or two A Level plus two AS Level passes (Grade E and above). Some universities may accept five or six Cambridge IGCSE grades as equivalent to one A Level or two AS Level results.

Universities will also require proof of English language or Chinese language ability; Cambridge IGCSE English Language or English Literature are accepted as proof of ability at some universities. Cambridge International A Levels may be awarded advanced credit at most universities in Hong Kong.

Application processes and deadlines for each type of application – advance/fast track, main or late – can vary, so you are advised to check deadline dates for the individual universities you wish to apply to. Different departments consider applications on a rolling basis, so you are encouraged to submit your applications at the earliest opportunity.



University of Hong Kong

For applicants who have completed the entire GCE A Level curriculum: Grade E in three GCE Advanced Level subjects, not including any language subjects in English/Chinese. For applicants who have completed GCE AS Level only: Grade B in three GCE Advanced Subsidiary Level subjects, not including any language subjects in English/Chinese.

Advanced Standing:

- Students who have passed the HKU University Entrance Requirements (UER) for Cambridge International A Levels following a seven-year secondary curriculum may be granted Advanced Standing up to a maximum of 60 credit units (a full academic year). Within these 60 credit units, students may be granted 12 credit units from the Common Core (provided that students still take at least one Common Core course in each of the four Areas of Inquiry), plus six credit units from Core University English, plus six credit units from Chinese. Advanced Standing for discipline-based courses are at the discretion of the Faculty.
- Students who have similarly passed the UER for Cambridge International A Levels but following a six-year secondary curriculum will not be granted Advanced Standing under this blanket waiver, but will be dealt with on a case-by-case basis by the Faculty. Advanced Standing granted on a case-by-case basis should not exceed the limit of 60 credits as spelled out above.
- Details of the Advanced Standing to be granted will be determined by the University on a case-by-case basis, depending on the student's background and achievements, the degree to which they have been admitted, and the courses that may be selected within that degree curriculum.

This recognition statement and others from Hong Kong can be found on the recognition database.

China

In mainland China, universities offering English-taught programmes will accept Cambridge International A Level as equivalent to UK A Level for international application use (non-Chinese passport holder). Two to three A Level subjects are normally required with different subjects specified. In some universities, two AS Levels or three IGCSEs could be seen as equivalent to one A Level. For Chinese-taught programmes, HSK or A Level in Chinese will be required in application documents or interview sessions to prove language ability in Chinese.



University of International Business and Economics (UIBE)

The University of International Business and Economics (UIBE) accepts Cambridge International A Levels, AS Levels and GCSE/IGCSE/O Levels for entry purposes.

The University will take two AS Levels or three IGCSEs as equivalent to one A Level grade but not for all three A Level subjects for admission use. For minimum admission entry use, two A Levels plus two AS Levels or six IGCSEs plus one A Level plus two AS Levels will be considered.

Students from English-speaking countries do not need to prove language proficiency with an English A Level grade. For minimum admission entry use, one A Level plus two AS Levels or one A Level plus three IGCSEs will be considered. Scholarship application and credit transfer requires that applicants provide A Level grades.

This recognition statement and others from China can be found on the recognition database.

Singapore

Singapore remains an important destination for higher education, particularly with students from the Asia-Pacific region. Cambridge qualifications are widely accepted in Singapore but university entrance to the autonomous universities is highly competitive as places are extremely limited. International students (i.e. students not holding Singapore–Cambridge A Levels) usually make up a maximum of 15 per cent of the cohort.

Due to the volume of applications, a good pass in at least three A Level subjects is required for you to submit an application. Many applicants submit good passes for four or more A Level subjects for the universities' consideration. For some universities, you may also need to present SAT scores. As all the programmes are delivered in English, IELTS/TOEFL may also be required, depending on the courses applied for.

You must apply directly to the university of your choice. University applications open in October but deadlines vary (late February–April). Limited scholarships may be available for international students.

Due to the fact that Singapore–Cambridge A Levels are the national examinations, Cambridge International A Levels are not commonly offered by private schools in Singapore, meaning that local progression rarely occurs. However, Singapore is an important destination market, particularly given the expansion in the number of public universities and their rising status in the global university rankings. The Times Higher Education 2017 ranking confirmed the National University of Singapore (NUS) as the number one university in Asia and Nanyang Technological University (NTU) as number four. These two universities offer courses in a wide range of subjects to their student populations of over 30,000 each.



Polytechnic universities and Junior colleges generally accept Cambridge IGCSEs but this is dependent on availability and demand. The entry route to the three-year polytechnic courses is generally with the Singapore–Cambridge GCE O Level/IGCSE qualifications (secondary education). Polytechnics seek to train students with relevant and specific skills for the workplace.

National University of Singapore

The National University of Singapore welcomes applications from students holding a good pass in at least three Cambridge International A Levels. Many applicants submit good passes in four or more A Levels for their consideration. A total of all subject grades in two sittings taken within 12 months of each other will be allowed.

Please refer to their website for further details:
nus.edu.sg/oam/admissions/international-qualifications/international-qualifications/international-a-level

This recognition statement and others from Singapore can be found on the recognition database.

Japan

In April 2016 the Ministry of Education, Culture, Sports, Science and Technology – Japan (MEXT) published a new policy confirming that Cambridge International AS & A Levels are equivalent to the national high school graduation certificates for admission to universities in Japan. This applies to Japanese and international students aged over 18. Following the publication of this new policy, more Japanese universities recognise Cambridge qualifications including IGCSE/ AS/A Levels for admission use.

For English-taught degree programmes in particular, two or three A Level subjects with passing Grade E or above will usually be accepted as a minimum entry requirement. In some universities, two AS Levels are considered equivalent to one A Level. For language ability, applicants with IGCSE English grade C or A Level do not always need to submit further documents to prove their English language level. However, you may be required to attend online or face-to-face interviews to prove that your English language ability is sufficient for degree study. Outstanding A Level applicants will also have good scholarship opportunities in some Japanese universities. Please always refer to the details on individual university websites.



Nagoya University

Nagoya University welcomes students with Cambridge International A Levels. Cambridge International A Level is accepted as equivalent to UK A Level on a grade-for-grade basis. Cambridge International A Levels are linear and therefore retakes are only allowed for the whole subject. They are seen to provide a reliable measure of a student's knowledge and skills in the subject studied, are a reliable test of a student's problem-solving and critical thinking abilities and are reliable indicators of a student's performance.

Nagoya University welcomes all applicants from the Cambridge A Level curriculum to apply for their G30 International Program (English-taught programmes). Furthermore, students who have taken one of the following subjects will be exempt from submitting additional English standardised test scores:

- IGCSE English First Language (Grade C or above) or English Second Language (Grade B or above)
- GCE AS or A Level English (Grade E or above).

There are no minimum A Level subjects required, but three A Level subjects are highly preferred. For more details on the programmes, visit: https://admissions.g30.nagoya-u.ac.jp/undergraduate/

This recognition statement and others from Japan can be found on the recognition database.

Recognition in Europe

Formal recognition of Cambridge qualifications is fast gaining ground across this large and diverse region. **Please note**: admission policies and procedures can vary significantly depending on the country so be sure to research carefully before submitting an application.

Set out below are the general entry requirements for some of the most popular European study destinations. Policies for other European countries can be found on our recognition database.

Germany

The Central Office for Foreign Education (ZAB), on behalf of the Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany, recommends International A Level qualifications as acceptable for entry to undergraduate degree programmes, in accordance with specified requirements, as follows:

- three independent* academic subjects at A Level with a minimum grade C.
- Subject-specific requirements apply, depending on the chosen field of study, as well as by reference to three subject lists A, B, and C. Lists A and B include academic subjects, while List C specifies vocational subjects. Selecting a subject from List C will narrow the choice of degree programmes that the applicant is eligible for. The subject lists can be found on the anabin database of the Central Office for Foreign Education (ZAB) at www.anabin.kmk.org (German only).

*A Level subjects are independent of each other if they are not in the same field, with the exception of language subjects. For example, Economics and Business are not independent.

Within the recommendations of the Central Office, German universities decide on specific subject choices, combinations, and language requirements. Candidates should address any questions about entrance requirements, including language proficiency requirements (English, German) directly to their chosen institutions before applying.

The Central Office for Foreign Education (ZAB) also issues recommendations for Cambridge Pre-U Principal Subjects, Cambridge Pre-U Global Perspectives and Research (GPR) and the Cambridge Pre-U Diploma and meeting entrance requirements for Bachelor (undergraduate) degree programmes. The following equivalencies were agreed upon:

- A Cambridge Pre-U Principal Subject is the equivalent of a GCE Advanced Level.
- A Cambridge Pre-U Short Course is the equivalent of a GCE Advanced Subsidiary Level

The Cambridge Pre-U requirements are aligned to the AS & A Level requirements as described above. In particular, three Principal Subjects (or an equivalent combination of A Levels and Cambridge Pre-U Principal Subjects) with minimum grade M3 are required. Global Perspectives and Research is not accepted as a stand-alone qualification but may be valued by universities alongside the required A Levels / Cambridge Pre-U Principal Subjects.

Read more on our recognition page for Germany. Full details can be found on the anabin database of the Central Office for Foreign Education (ZAB) at www.anabin.kmk.org (German only).

Freie Universität Berlin

Freie Universität Berlin welcomes applicants with Cambridge International AS & A Levels and Cambridge Pre-U qualifications, provided all general and subject-specific requirements as determined by the Central Office for Foreign Education ('Zentralstelle für ausländisches Bildungswesen'), an institution of the Ministries of Education and Cultural Affairs, and the University itself have been met.

Details of general and subject-specific requirements can be found on the website of the Central Office for Foreign Education (ZAB of the KMK) here: http://anabin.kmk.org as well as on Cambridge International's recognition database under Germany, KMK – Conference of Ministers of Education and Cultural Affairs in the Federal Republic of Germany. Additional programme-specific admissions criteria as defined by Freie Universität Berlin might also apply.

Full details of courses offered by Freie Universität Berlin and their respective admissions criteria can be found on the University's website at www.fu-berlin.de/en/studium/international/index.html

One other useful source is uni-assist, the service point for international student applications, supported by approximately 170 German universities, which processes and evaluates credentials. The uni-assist website, at www.uni-assist.de/en is available in English, provides a wealth of guidance, tools and FAQs regarding the application process and the access requirements in Germany.

The Netherlands

Nuffic, the expertise and service centre for internationalisation in Dutch education, has issued the following recommendations regarding IGCSE, AS & A Level qualifications and entrance to higher education in the Netherlands:

- Admission to an undergraduate degree programme at a research university ('wetenschappelijk onderwijs', WO) requires a Dutch VWO diploma or its equivalent. Three IGCSE subjects at Grade C or above plus three GCE Advanced Level (A Level) subjects at Grade E or above (a total of six **different** subjects) is considered comparable to a VWO diploma.
- Admission to higher professional education ('hogerberoepsonderwijs', HBO) requires the minimum of a HAVO diploma or its equivalent. Four IGCSE subjects at Grade C or above plus two GCE Advanced Subsidiary Level (AS Level) subjects at Grade E or above (a total of six **different** subjects) is considered comparable to a HAVO diploma.

You can find full details regarding the acceptance of IGCSEs and A Levels on the Nuffic website at www.nuffic.nl/en/subjects/education-and-diplomas-united-kingdom

Your chosen higher education institution (HEI) verifies whether you meet its educational and language requirements. Information on the selection criteria will be available through your chosen institution and/or selected study programme, so do check these carefully.

'Studielink' is the official registration and application portal for programmes at Dutch higher education institutions. The 'Studielink' website, available at www.studielink.nl, provides step-by-step instructions on how to enrol.

Please note: you must check with your chosen institution whether you are required to register via 'Studielink' as some institutions use a different method to register students from abroad.

The website 'Study in Holland' at www.studyinholland.nl is also worth a visit. It provides useful information on admission requirements, study programmes, tuition fees and much more.

Our recognition database holds information on the Dutch universities which have formally recognised Cambridge qualifications. Certain courses may have higher entry requirements, depending on the university. You are strongly advised to check all requirements before submitting an application. Any questions, contact the university concerned.

For more information on applying to universities in the Netherlands, see our brochure, 'Destination Netherlands' and go to: cambridgeinternational.org/programmes-and-qualifications/recognition-and-acceptance/country/netherlands

University of Groningen

The University of Groningen welcomes applications from students holding Cambridge International A Levels and Cambridge IGCSEs. Students generally require three Cambridge IGCSEs at Grade C or above plus three Cambridge International A Levels (that is, six **different** subjects in total) to be considered for admission to undergraduate degree programmes. These requirements are comparable to the Dutch VWO diploma.

Meeting the minimum entry requirements does not automatically guarantee a place on your chosen degree programme. Entry requirements and selection procedures vary according to the programme, so it is important to check specific entry requirements. In addition, you must satisfy any specific subject or language requirements that may be prescribed for your selected programme.

Full details of minimum grade requirements, prerequisite subjects and specific language requirements can be found by checking the University website at www.rug.nl/education/application-enrolment-tuition-fees/admission. Alternatively, please contact the Admissions office directly.

Recognition in Latin America

The recognition of Cambridge qualifications is growing in Latin America, where the AICE Diploma is a popular school-leaving qualification. Universities across the region are increasing their acceptance and recognition of Cambridge qualifications.

Argentina

Cambridge qualifications are recognised at more than five higher education institutes, including Universidad de San Andrés, Universidad Argentina de la Empresa (UADE) and Universidad Austral.

A number of universities will accept applications if you possess the Cambridge AICE Diploma or Cambridge International AS & A Levels.

The minimum requirement for application to a university for students applying from Argentina is that you hold a Bachillerato (national school-leaving certificate). You must apply directly to the individual university through the admissions department.

If you are an international student applying to universities in Argentina, you must provide proof that you have completed your studies. Some universities may offer exemption from certain entry conditions if you can provide proof of Cambridge AICE Diploma completion.

Some universities give preferential entry requirements if you possess Cambridge qualifications, such as exemption from a subject in the entrance courses (taken between finishing school and starting university) and exemption from proof of English language ability. However, entry requirements vary between universities, and are made at the university's discretion, so you are advised to check directly with the admissions department of each individual university you wish to apply to. For example, ITBA recognises individual Cambridge International A Levels (Maths, Chemistry or Physics only), with Grade C or above to exempt students from taking that subject in the entrance course; and a shorter course if you have achieved a Cambridge International AS Level with Grade C or above.



Universidad Austral

Universidad Austral welcomes students who hold the Cambridge AICE Diploma. Additional requirements for admission, such as minimum points score, undertaking a research project and/or an interview may be requested.

A pass in Cambridge International AS or A Level Mathematics with a minimum of 80 points will exempt students from the Maths Foundation course, provided the student has obtained a general average of 7 in secondary school. A pass in Physics at Cambridge International AS or A Level will exempt students from the Introduction to Engineering course.

This recognition statement and others from Argentina can be found on the recogntion database.

Brazil

Recognition of Cambridge qualifications is starting to increase in Brazil. Currently, Fundação Instituto de Administração (FIA) is the only private university that formally states that they accept Cambridge qualifications. Brazilian students can apply to study in higher education institutions in Brazil, providing that they have a Certificado de Conclusão do Ensino Médio, which is proof that they have finished their compulsory primary and secondary education.

Higher education institutions in Brazil can specify their own selection process – two of the most popular admissions methods currently in place are the ENEM and the Vestibular.

The ENEM (National Examination of Secondary Education) is the test devised by the Ministry of Education, Brazil to grant school students access to the public or federal universities of the country and to private universities. The ENEM has become the most important examination offered in Brazil and can be taken by any student about to graduate from high school or who has already completed their secondary school education.

The Vestibular examination is still used by many institutions in Brazil as an alternative to ENEM. This examination is used to evaluate the knowledge acquired by the student in their primary and secondary school education.

You have the opportunity to take the ENEM examination once a year in November. The following website provides more information and details of how to register: http://enem.inep.gov.br. You should contact individual institutions directly to check the arrangements for Vestibular examinations.

All prospective international undergraduate students applying to study in Brazil must be able to prove their proficiency in Portuguese, to be able to study in the language and take the admissions examinations. This is assessed by the Certificado de Proficiência em Língua Portuguesa para Estrangeiros (CELPE-Bras). The CELPE-Bras is offered in Brazil and countries such as the US, Germany, Chile and Japan with the support of the Brazilian Ministry of International Relations (MRE). You can register for the CELPE-Bras online in February, March, August or September at http://enem.inep.gov.br.

You will also need to submit their academic transcripts to the Conselho Estadual de Educação, the educational institution located in each Brazilian state, which will authorise recognition of foreign education certificates.

You will need to obtain a visa to study in Brazil. You can do so through the Consulate General of Brazil (Consulado Geral Do Brazil) in your home country. Student visas are issued for one year and can be renewed. Visas usually take around two to three months to be processed.

Fundação Instituto de Administração (FIA)

Fundação Instituto de Administração welcomes candidates who present three or more Cambridge International AS or A Levels with any grade. Applicants with these qualifications are exempt from the admission test and also automatically from the need to prove proficiency in English in any other way (TOEFL, for example).

This recognition statement can be found at: www.cambridgeinternational.org/recognition-search

Recognition in the Middle East

Formal university recognition in the Middle East and North Africa (MENA) region is on the rise as the popularity of Cambridge qualifications continues to steadily grow. Examples of the recognition policies which we currently hold for key countries within the MENA region can be found below.

Egypt

The Supreme Council of Universities is presided over by the Minister of Higher Education and is responsible for establishing the entrance requirements for both government and private universities. Admission requirements to first-cycle study programmes will vary depending on your choice of degree:

- Admission to an undergraduate degree programme generally requires:
  - **Eight IGCSEs** at minimum Grade C or Grade 4 or above plus one A Level at Grade D or above. An A level can be substituted by two AS Levels so eight IGCSEs and two AS Levels would also be acceptable.
- Admission to a medical or mathematical programme such as medicine, pharmacology, engineering or computer science (this is not an exhaustive list) requires:
  - **Seven IGCSEs** at minimum Grade C or Grade 4 or above plus two A levels at minimum Grade D or above.

Please note: An A level can be substituted by two AS Levels. Four AS Levels OR one A Level & two AS Levels (alongside the required 7 IGCSEs) are considered acceptable alternatives.

- Specific subjects may also be required for entry to faculties such as the Faculty of Medicine, Dentistry, Pharmacy, Physiotherapy, Engineering or Computer Science & Information. For Engineering, for example, mathematics plus either physics or chemistry are required; for Pharmacology, the required subjects are biology plus either chemistry or mathematics. You are advised to check with your chosen university before submitting an application.

All applicants must have successfully passed the Ministry of Education's examinations in Arabic, Religious Studies and Social Studies. More details about these three examinations can be found at www.moe.gov.eg You must also provide proof of 12 years of full-time schooling.

American University in Cairo (AUC)

The American University in Cairo (AUC) requires eight subjects for admission consideration. The following grades will satisfy the eight-subject requirement: Grade C or above at O Level, IGCSE or AS Level; Grade D or above at A Level. Subjects completed at both AS Level and A Level will not be double-counted; the highest grade only will be considered.

Please note:

- Preference will be given to applicants with excellent A Level and/or AS Level grades
- An O Level or IGCSE in Arabic as a foreign language will not be accepted as one of the eight eligible subjects

Applicants must submit all certificates to AUC. The University calculates eligibility using the highest eight scores. Copies with a fresh stamp (from the applicant's school or the British Council) are considered as official documents.

Applicants must also have completed a minimum of 12 years of schooling. Admission of IGCSE applicants who have completed less than 12 years of schooling is not guaranteed and is subject to University approval and available slots.

Full details of undergraduate programmes and applications procedures can be found at **www.aucegypt.edu/** Questions concerning programs of study, entry requirements and application procedures should be addressed to the Office of Recruitment and Student Service Center at **enrolauc@aucegypt.edu**

Transfer credits

The University grants transfer credits for A Level subjects with a minimum of a Grade B. The University does not grant transfer credit for subjects completed at AS, IGCSE or O Level. Full details of transfer credits can be found at http://catalog.aucegypt.edu/content.php?catoid=29&navoid=1459

This recognition statement and others from Egypt can be found on the recognition database.

Saudi Arabia

The Ministry of Education of the Kingdom of Saudi Arabia has set the following university entrance requirements:

The British GCSE certificate is equivalent to the General Secondary Education certificate of the Kingdom of Saudi Arabia, in accordance with the following options:

- eight GCSEs

  or

- five GCSEs plus one A Level

  or

- five GCSEs plus two AS Levels.

You must have achieved Grade C or above in each GCSE subject, and Grade D or above in each AS and/or A Level subject.

You must have completed the equivalent of 12 years of secondary schooling. Full-time attendance at school is required in all cases; correspondence learning will not be accepted in lieu.

The University of Business and Technology (UBT)

The University of Business and Technology (UBT) values Cambridge qualifications for entry to higher education studies.

All candidates applying with Cambridge IGCSEs or AS/A Levels must meet one of the Ministry of Education's requirements for equivalency listed below:

- eight IGCSE (O Level) subjects with minimum of Grade C
- five IGCSE (O Level) subjects with a minimum of Grade C plus two AS subjects with a minimum of Grade D
- five IGCSE (O Level) subjects with a minimum of Grade C plus one A Level subject with a minimum of Grade D.

In addition, candidates applying with Cambridge qualifications must have completed a minimum of 12 years of education and provide a certificate/letter from their school as evidence. All other requirements for entry to the UBT must also be fulfilled.

Full details of UBT's undergraduate programmes and how to apply can be found at: www.ubt.edu.sa

This recognition statement and others from Saudi Arabia can be found on the recognition database.

United Arab Emirates

The United Arab Emirates Ministry of Education has set the following university entrance requirements:

1. You must have completed 12 years of schooling if you wish to be considered for admission to UAE institutions of higher education.
2. You must have achieved **a Grade C or above** in a minimum of **five** subjects at IGCSE or O Level **plus two** subjects at GCE Advanced Subsidiary (AS) Level.
3. Subject-specific requirements for certain courses may also apply. You are strongly advised to check with your chosen university before submitting an application.

Middlesex University Dubai

Middlesex University Dubai welcomes applicants with Cambridge qualifications. The University has over 3000 students from more than 100 different nationalities and offers the International Foundation Programme (IFP) along with a wide variety of degree programmes, including Business, HR, Marketing, Psychology, International Tourism Management, Law, Computer Systems Engineering and Accounting & Finance.

Entry requirements for undergraduate study vary depending on the individual programme. Students can check the entry requirements for their selected course(s) at www.mdx.ac.ae/courses. Alternatively, students can contact the University's Admissions Department at admissions@mdx.ac.ae, who will be able to answer any questions students may have.

A certificate with Cambridge IGCSE First Language English or Cambridge IGCSE English as a Second Language or Cambridge GCE O Level in English Language, at Grade C or above, will meet the University's proficiency requirements.

To find out more about Middlesex University Dubai, visit the University's website at www.mdx.ac.ae. You can also follow Middlesex University Dubai on social media. Please check our recognition database for full details.

This recognition statement and others from the United Arab Emirates can be found on our recognition database.

4. Certificates with foreign qualifications must be attested by either the UAE Ministry of Education, or by the relevant regional education zone (for example, KHDA in Dubai) before they will be accepted. Universities will instruct you as to the correct procedures to follow to meet this requirement. If you have any questions regarding your application, contact the university concerned.

   Please note: for Cambridge certificates issued outside the UAE, we can provide a certifying statement of results which has been authenticated by the Foreign and Commonwealth Office as set out in the Hague Agreement. The application form to obtain this certificate can be found on our website at https://certstat.cambridgeinternational.org, or by searching for 'Certifying Statement of Results' on our website.

5. **Please note:**

- The above grades are the minimum admission requirements; institutions can set higher standards at their own discretion.
- Arabic and Islamic Studies are compulsory for entrance for undergraduate studies in the UAE. Achievements at IGCSE/O Level or AS or A Level will not be accepted in lieu. You must sit the Ministry of Education's examinations in these two subjects. You can find further information at www.moe.gov.ae
- UAE high school graduates wishing to pursue an undergraduate degree programme at UAE University, Zayed University or the Higher Colleges of Technology (HCT), and higher diploma programmes at HCT must provide evidence of their proficiency in English. Details of the approved English language tests can be found on the universities' websites. You should check with your chosen institutions if you have any questions regarding language or subject-specific requirements.

American University of Sharjah

To be considered for admission to an undergraduate degree programme with Cambridge qualifications at the American University of Sharjah, applicants must present:

- a minimum of eight different subjects chosen from Cambridge IGCSE, Cambridge O Level and/or Cambridge International AS & A Level.
- Four of these subjects must be offered at Grade B or above; the four remaining must be at Grade C or above.
- Subjects studied must be from at least four different subject groups (mathematics, the sciences, the humanities etc.).

Only subjects classified as academic by AUS (including arts and the creativity subject group) will be considered for admission. Mathematics is compulsory to major in science and should be offered with other science subjects. Please note: If students have any questions regarding the eligibility of their chosen subjects, they should contact AUS directly.

Priority regarding acceptance and the selection of majors will be given to applicants who:

- have completed at least 12 years of schooling
- provide an official letter from their school giving the final year of completed study
- have achievements in Cambridge International AS Levels and/or Cambridge International A Levels
- have achieved the highest grades in their exams.

Please note:

- All applicants are required to present proof of their English proficiency (iBT 80, iTP 550, IELTS 6.5). Further information on AUS's English proficiency requirements can be found at www.aus.edu/academic-requirements
- Various placement tests are also required by the different majors. Placement tests are compulsory and vary, depending on the student's chosen major.

Full details of AUS's undergraduate degree programmes, entry requirements (including those for English language) and placement tests for majors can be found on the University's website at www.aus.edu. Students who have questions regarding their application, or selected courses, should contact AUS directly.

This recognition statement and others from the United Arab Emirates can be found on the recognition database.

Recognition in North America

USA

Universities and colleges across the USA, including all Ivy League universities, welcome students with Cambridge qualifications.

Colleges and universities generally require a minimum of AS or A Levels for admission, but some colleges will accept Cambridge IGCSEs and O Levels as meeting entry requirements. Some institutions and credential evaluators may consider five Cambridge IGCSE or O Level qualifications with passes at Grade C or higher to be equivalent to a high school diploma.

Some colleges and universities accept applications through the Common Application (www.commonapp.org). Others, primarily public universities and university systems, have their own application process which requires you to submit applications to the university directly. There is no limit to the number of institutions you can apply to. In addition to the application form, an academic transcript, one or two teacher recommendation letters, a personal statement essay, a college counsellor or a secondary school report, a list of extracurricular activities, and standardised testing scores – either SAT or ACT – are required. Some universities may additionally require essays, recommendations, or portfolios. Some colleges and universities may consider academic achievement or standardised testing scores for scholarships, some of which are available to overseas students.

Cambridge International AS & A Level qualifications may be eligible for advanced standing or credit at universities that accept them. We recommend you check your eligibility with the university directly.

There are a number of admissions dates and paths:

- **Rolling admissions** – applications open around October and close in May. Universities receive and make application decisions throughout the year. Many public universities have rolling admissions and close applications after 1 May.
- **Early decision** – typically October and November deadlines, decision by mid-December and is binding. If you are accepted for this round, you must withdraw all other applications and commit to this college or university. You and the school sign an Early Decision agreement at the time of application.
- **Early action** – typically October or November deadlines, decision by mid-December and is not binding. You can apply to other universities for later deadlines and make a decision later in the year.
- **Regular decision** – typically early January to February deadlines, decision by the end of March and is not binding. You have the month of April to decide between offers and commit to a university by 1 May.
- **Waitlist** – you are placed on a waitlist and may hear a decision on admission after 1 May. Admission from the waitlist to a desired university is not guaranteed.
- **Transfer** – if you are transferring between universities or from community college to university you must check individual transfer deadlines.
- **Community college enrolment** is typically more flexible and rolling throughout the year.

For more information on applying to university in the USA, please see our brochure 'Destination USA: Using Your Cambridge Qualifications to Study in the US'.

Arizona State University

Arizona State University recognises Cambridge International AS & A Levels for matriculation purposes. A maximum of 6 to 10 credits can be awarded for grades ranging from E or above, depending on the subject. AS Levels at Grade E or above will receive a maximum of 3 or 4 credits (with the exception of Chinese which receives 5 credits). All AS Level English courses are now recognised for placement into ENG 105 and 3 elective credits. All A Level English courses are recognised for placement into ENG 105 and 6 elective credits.

This recognition statement and others from the USA can be found on the recognition database.

Canada

Universities and colleges across Canada welcome students with Cambridge qualifications. There is no federal ministry of education responsible for admissions; instead, each of the 10 provinces and three territories holds responsibility for their own universities and admissions procedures. If you are applying to universities in Alberta, Ontario and British Columbia, you may apply through a common electronic application for the province. Applications to universities in other provinces are made to the university admissions office directly.

If you possess at least four AS Levels and/or at least two A Level qualifications you are eligible to apply to Canadian universities. More competitive courses may require additional qualifications at higher grades. Colleges may accept Cambridge IGCSE/Cambridge O Level as meeting entry requirements. You may be eligible for advanced standing credit. All Canadian universities have language proficiency requirements in English or French. In addition to language requirements, you need to consult requirements for international student entry by institution. We strongly recommend that you check the entry and language requirements of your chosen course of study before submitting an application.

Canadian universities will typically offer a Conditional Letter of Admission with certain conditions to meet in order to be awarded a place. These conditions usually include maintaining the academic average and successfully completing and graduating from high school.



International students can also use these Conditional Letters of Admission to start the application process for a study permit. All non-Canadian citizens or permanent residents are required to have a valid study permit to pursue studies that are longer than four months.

Application deadlines vary by province and institution. Most application deadlines are in January or February. Many universities have 'rolling admission', whereby a decision is made within weeks of receiving the application. In general, it is recommended that you apply 10 to 12 months before your desired entry date.

University of Toronto

The University of Toronto will accept AS Levels, A Levels and Cambridge AICE as a basis for admission. Applicants may be considered with grades of A and B on at least four different AS examinations or three different A Levels or the Cambridge AICE Certificate. Students are advised to take AS/A Level subjects that will provide them with strong academic preparation.

Subjects with a more vocational focus are not advised. Applicants seeking admission to the Faculty of Applied Science and Engineering are required to present Chemistry, Mathematics and Physics at A Level with grades of A. Transfer credit may be granted for some academic Advanced Level examinations. No credit is given for Advanced Subsidiary level exams. No credit is given by the Faculty of Applied Science and Engineering.

This recognition statement and others from Canada can be found on the recognition database.

Recognition in Oceania

Recognition of Cambridge qualifications is growing fast throughout Oceania. In a region whose universities increasingly claim high places in the world rankings, there are numerous opportunities for you to enter and succeed in top-class degree programmes. This page gives some examples.

Australia

Universities across Australia welcome applications from Cambridge students. Cambridge International A Levels are widely accepted for direct entry to undergraduate degree courses, and a growing number of universities now also accept Cambridge Pre-U. For academic courses at established universities, typical Australian university entrance requirements are three A Level passes at minimum Grade C or above, although some courses may have lower entry requirements. Two AS Level subjects can be counted in place of one A Level subject for some universities.

Tertiary Admissions Centres across Australia process applications for Cambridge students from Australia and New Zealand; international students apply directly to the university.

All Universities Admissions Centre (UAC) participating institutions consider GCE Advanced Levels (or comparable qualifications) equivalent to an Australian Year 12 qualification. UAC also considers the Cambridge Pre-U Diploma as comparable to the Australian Year 12 standard. If you did not complete the Cambridge Pre-U Diploma, Cambridge Pre-U Principal Subjects and GPR will be assessed in lieu of A Levels.

More details about applying to university in Australia can be found in our 'Destination Australia' brochure.





University of Melbourne

A minimum of three A Levels at Grades BBC are required for application. Requirements differ and some courses require significantly higher grades. Admission is guaranteed to students who achieve certain grades. Cambridge Pre-U is recognised for direct entry. The University of Melbourne will also accept a combination of Cambridge Pre-U and GCE A Levels to meet the entry requirements.

This recognition statement and others from Australia can be found on the recognition database.

New Zealand

All universities in New Zealand accept Cambridge International A Levels for admission. Cambridge Pre-U is also widely accepted. The minimum entry requirements are agreed by Universities New Zealand – Te Pōkai Tara, which represents all universities in New Zealand.

For students in New Zealand: In response to changes in the UK Universities and Colleges Admissions Service (UCAS) tariff system as of September 2017, Universities New Zealand has instituted the NZ Cambridge International Exams University Entrance tariff system. Do check the Universities New Zealand website: www.universitiesnz.ac.nz for details of changes made.

We would advise you to check your chosen university's website for any specific entry requirements. Minimum grades must also be achieved in literacy and numeracy subjects. Since 2016, the University of Auckland has also required domestic students to obtain a minimum of a Grade D in an English subject at AS or A Level in order to satisfy the Academic English Language Requirement.

Typical entry requirements for international students are three A Levels including at least one Grade C or better. A result in General Studies cannot be included among the three on which the application is based.





Universities New Zealand – Te Pōkai Tara

For students (domestic and international) Cambridge International examinations, the minimum university entry standard is as follows:

Part A
A minimum of 120 points on the NZ Cambridge International Exams University Entrance tariff at A or AS level from subjects other than the General Paper, including at least three subjects (other than Thinking Skills) in which no grade is lower than D.

Part B
Literacy and numeracy must be satisfied as follows:

- LITERACY: A Grade E or better in any one of AS English Language, Language and Literature in English, Literature in English. A Grade D or better will satisfy one of the subject requirements of Part A, or as prescribed for university entrance with NCEA.
- NUMERACY: Either (i) A Grade D or better in IGCSE or GCSE mathematics, or (ii) Any mathematics passed at AS level.

A Grade D or better will satisfy one of the subject requirements of Part A, or as prescribed for university entrance with NCEA.

This recognition statement and others from New Zealand can be found on the recognition database.

Recognition in Sub-Saharan Africa

Formal university recognition in the African continent is on the rise as increasing numbers of Cambridge students look to study in the region. Listed below are the recognition policies for some universities in the region – other policies can be found on our recognition database.

South Africa

If you did not follow the formal secondary school route in the South African schooling system and want to apply to study a Bachelor's degree at a South African university you will need to qualify for a certificate of complete or conditional exemption from Universities South Africa (USAf), a membership organisation representing South Africa's 26 public universities.

A certificate of exemption will be granted to holders of Cambridge International AS & A Levels and the AICE Diploma, provided you meet the minimum qualification combinations and the subject group requirements. The granting of a conditional exemption is solely at the discretion of USAf. USAf's recognition of Cambridge qualifications applies to all universities in South Africa.

A certificate of exemption is required to pursue first degree studies at a South African university but it does not guarantee acceptance at a university. Universities in South Africa are autonomous and may set their own entry requirements, which are usually much higher than the minimum requirements to obtain a certificate of exemption. Entry requirements differ from university to university, faculty to faculty and programme to programme. We recommend you confirm the entry requirements of the specific programme you wish to apply for well in advance of applying, and ensure you have chosen the correct subjects and will achieve the required grades.

For further information please see our brochure 'Conditions and Requirements to Gain Exemption for Entry to South African Public Universities' on our website.

Universities South Africa

Universities South Africa (formerly HESA) will grant matriculation exemption certificates to holders of Cambridge International AS & A Levels, provided they meet the subject group requirements and the following criteria:

- three subjects at A Level (A–E) plus one subject at IGCSE (A*–C)
- two subjects at A Level (A–E) plus three subjects at IGCSE (A*–C)
- four subjects passed at AS Level (A–D) plus one subject at IGCSE (A*–C).

Complete subject grouping lists can be found on the Cambridge website at:
www.cambridgeinternational.org/Images/523166-university-recognition-south-africa.pdf

For further information, please visit www.usaf.ac.za

This recognition statement and others from South Africa can be found on the recognition database.



Kenya

Cambridge International Advanced (A) Levels are accepted for entry to undergraduate degree courses in Kenya. Applications can be made directly to the universities, often via an online application form. Universities generally require two principal passes and one subsidiary pass at A Level in relevant subjects. However, as entry requirements differ from university to university and from programme to programme, you are advised to check the minimum entry requirements for your chosen course at your preferred institution.

Institutions list the entry requirements for each of their courses on their websites alongside other requirements, such as an admissions test, an interview or an English proficiency requirement. Meeting the minimum entry requirements in no way guarantees admission to a programme.

University of Nairobi

General admissions criteria:

Admission to Certificate Courses will be based on any of the following minimum qualifications:

- a A Level qualification with a minimum of two subsidiary passes or equivalent.

Admission to Diploma Courses will be based on any of the following minimum qualifications:

- a A Level qualification with a minimum of two subsidiary passes or equivalent.

Admission to Bachelor's Degree Programmes will be based on any one of the following minimum qualifications:

- an A Level with two principal passes or equivalent in relevant subjects.

Only applicants whose results are available at the time of application will be considered.

www.uonbi.ac.ke/admission/undergraduate

This recognition statement and others from Kenya can be found on the recognition database.

Recognition in the UK

Cambridge qualifications are valued by UK universities as academically rigorous qualifications. Cambridge International AS & A Levels are recognised by UK higher education institutions as equivalent to UK GCE AS and A Levels. The Cambridge Pre-U, offered in the UK, is also widely recognised by universities. Most UK universities require a minimum of three A Levels for admission, however some courses will admit students with two A Levels. Check the entry requirements for your chosen course with the university directly.

United Kingdom

In the UK, you must apply for undergraduate courses through the Universities and Colleges Admissions Service (UCAS), not to individual universities. According to the UCAS 'International Qualifications' handbook entry, Cambridge International AS & A Levels are 'accepted at grades A*–E in lieu of the UK GCE A and AS Level on a subject for subject and grade for grade basis' ('UCAS International qualifications 2015', p75).

Many courses require certain grades and particular subjects in order for students to apply. It is important you check that your choice of Cambridge International AS & A Level subjects is suitable for your intended degree course, especially if you have a specific career path in mind such as medicine, engineering or law. For medicine, for example, two sciences or one science and a maths qualification is often expected.

UK applicants typically hold at least five GCSEs at Grade C/4 in academic subjects. However, for competitive courses such as medicine, a range of good GCSEs – mostly A* and A grades (numeric grade 7–9) – may be expected. Since Cambridge IGCSE and Cambridge O Level qualifications are equivalent in standard to the UK GCSE, universities will expect the same grades in Cambridge IGCSE or Cambridge O Level examinations as they would from other applicants holding equivalent qualifications. Most university courses require at least a Grade C (or numeric grade 4) in GCSE English and Mathematics, and sometimes a science depending on the course (for example, medicine, nursing and primary school teaching). Some less competitive courses may require lower grades and may admit students who hold a mix of Cambridge International AS or A Level grades.

UK universities accept Cambridge Pre-U as equivalent to other Level 3 qualifications such as A Levels. The UK's most prestigious group of universities, the UK Russell Group (which includes Oxford and Cambridge), has welcomed the academic rigour of the qualification.

For more information on applying to university in the UK, including key dates, please see our brochure: 'Destination UK – Using your Cambridge Qualifications to Study in the UK' and the UCAS website www.ucas.com.

Imperial College London

Imperial College London welcomes students with Cambridge International A Levels and considers them to be equivalent to UK A Levels on a grade-for-grade basis.

When making an offer, Imperial takes into account that Cambridge International A Levels are linear and therefore re-takes are only allowed for the whole subject. Cambridge International A Levels provide a reliable measure of a student's knowledge and skills in the subject studied and are a reliable indicator of students' performance. They demonstrate a student's abilities for problem-solving and critical thinking.

For more information about Imperial College London and how to apply please visit www.imperial.ac.uk

This recognition statement and others from the UK can be found on the recognition database.

Demonstrating your English language ability

If English is not your first language, or you come from a country where English is not an official language or one of several official languages, you may be required to provide proof of your English language skills.

Cambridge IGCSE First Language English, Cambridge IGCSE English as a Second Language and Cambridge O Level English Language are accepted by many universities around the world towards meeting English language proficiency requirements. Some universities may exempt you from further proof of your English language ability if you show you have been educated in English for a certain number of years. All Cambridge courses and qualifications, with the exception of modern foreign languages, are taught in English.

We strongly advise you to check the English language requirements of each university and course you are interested in applying to before making any applications.

Please be aware that the English language skills you may be asked to provide evidence of may be linked to visa requirements for the country in which you wish to study.

Universities may also require students to take another specific English language proficiency test such as TOEFL or IELTS if you are not an English native speaker. Requests to take a specific test may be linked to your visa application. Cambridge International cannot exempt you from taking an additional English language test if you are asked to take one.

The recognition database

Our recognition database allows you to search by qualification for universities in specific countries. To access the database, go to cambridgeinternational.org/recognition-search

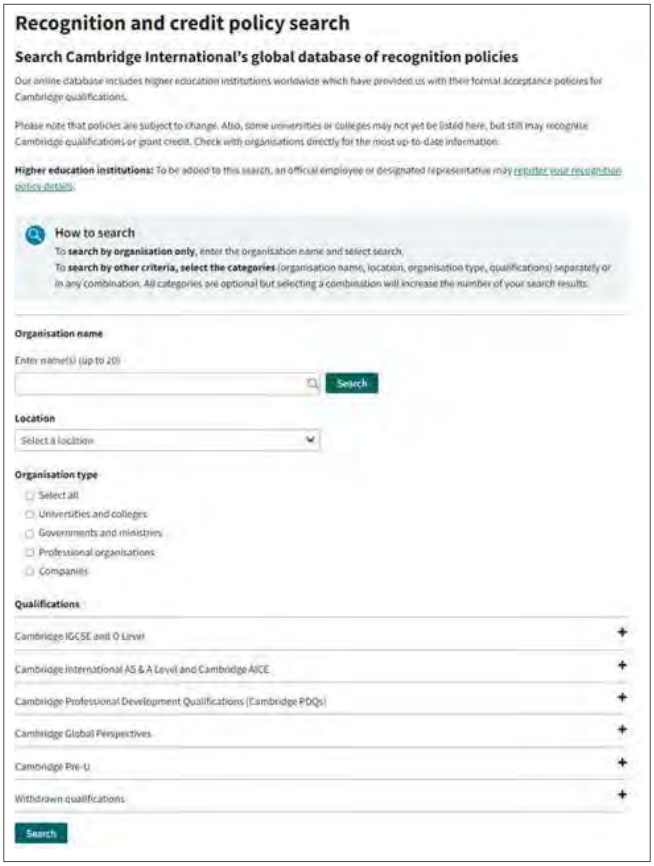
Select the country you wish to search for, the type of organisation you wish to search for and the qualification type you hold. Alternatively, use the search box to search by name for a particular organisation.

For each organisation, contact details are viewable by clicking on 'Details' under each entry. If the university of your choice is not included in our database, please let us know by registering your institution's admissions policy. Visit cambridgeinternational.org/recognition-search.

There are many organisations not listed on our database which do accept Cambridge qualifications. The database is correct according to the information provided to us; however, we recommend checking with organisations directly for the most up-to-date information on entry requirements as they are subject to change.

More details at:
https://help.cambridgeinternational.org/hc/en-gb
or email info@cambridgeinternational.org

You can also call our Customer Services team on +44 1223 553554.



Support from Cambridge

More information

To find out more about Cambridge programmes and qualifications, go to www.cambridgeinternational.org/pathway

There are also various country-specific brochures available on our website:

- Destination UK
- Destination USA
- Destination Australia
- Destination India
- Destination Pakistan
- Destination South Africa
- Destination Netherlands
- Destination Canada.

Further help

You can find answers to frequently asked questions from Cambridge principals, teachers, students, parents, examinations officers and other customers at https://help.cambridgeinternational.org/hc/en-gb

You can enter your query into the search box or navigate using the topic list menu. If at any point you decide you would rather call or email someone you may do so by selecting 'Contact us' found at the top of the page.

We are committed to making our documents accessible in accordance with the WCAG 2.1 Standard. We are always looking to improve the accessibility of our documents. If you find any problems or you think we are not meeting accessibility requirements, contact us at info@cambridgeinternational.org with the subject heading: Digital accessibility. If you need this document in a different format, contact us and supply your name, email address and requirements and we will respond within 15 working days.

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CAMBRIDGE

An international education from Cambridge

What lies at the heart of our approach



cambridge.org/internationaleducation

Welcome to our guide: An international education from Cambridge.



This short guide provides an introduction for learners, parents and schools to the Cambridge approach to an international education. It sets out the five key elements to providing a truly international education.

These are:

- an international curriculum
- our approach to teaching and learning
- assessment with Cambridge
- international recognition and university acceptance around the world
- our global community of learners, teachers and schools.

At any one time, around one million learners in 10 000 schools, across over 160 countries are learning with a Cambridge curriculum. We are the largest exam board in the world and one of the oldest – we have been providing international exams for over 150 years. We are also not-for-profit and wholly owned by the University of Cambridge, meaning that all our focus goes into providing the best possible education for our international learners, wherever they may be.

An international education from Cambridge represents an international standard and a truly global approach. It also equips students whose first language is not English to function competently and confidently in the English language – the principal language of international exchange and business. That is why Cambridge programmes are recognised all over the world as preparing students for their higher education, careers and future lives.

Research shows that the most important factor in improving learner outcomes is improving teacher practice. At Cambridge, we are providing an ever-greater range of training events for our teaching community – over 2000 per year face-to-face and hundreds more online.

We are always delighted by the interest of our international community of schools in engaging deeply with us and with one another. We have striven to respond to that demand through more conferences, online communities and social media channels. We are also helping Cambridge schools to create their own local communities, run by schools for schools.

The world changes rapidly, bringing with it an ever-shifting array of opportunities, as well as challenges. At Cambridge, we are fully committed to giving all our learners the skills and knowledge to navigate the 21st century world with passion and curiosity.

Rod Smith, Group Managing Director,
International Education,
Cambridge University Press & Assessment.

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Introduction

The aim of this document is to communicate clearly to school leaders, teachers, students and parents what lies at the heart of a Cambridge education.

We prepare school students for life, helping them develop an informed curiosity and a lasting passion for learning.

Schools can shape a Cambridge curriculum around how they want students to **learn**, with a wide choice of subjects and flexible ways to offer them. Cambridge programmes inspire students to love learning, helping them **discover** new abilities and a wider world. And we help students develop the skills they need for life, and to **achieve** at school, university and work.

Our work is informed by research and underpinned by over 150 years of practical experience working with schools and governments worldwide. We are the only exam board that is wholly owned by a world-leading university, the University of Cambridge.

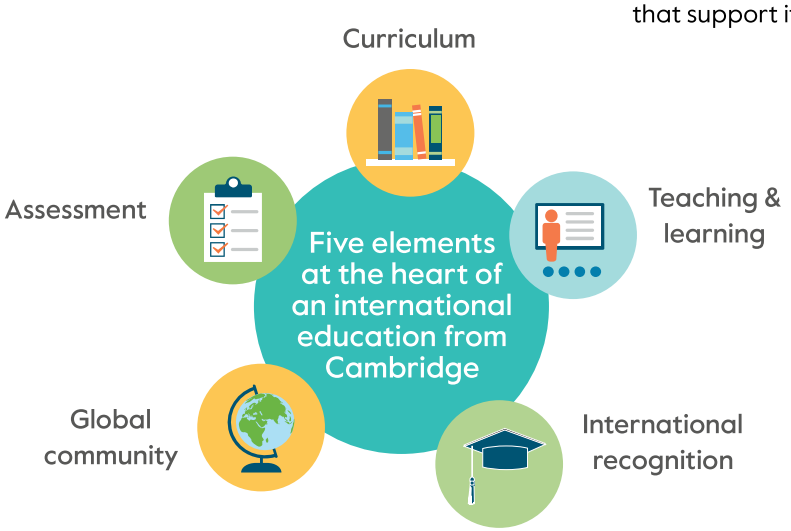
Our global community of nearly a million students in over 10 000 Cambridge schools in 160 countries benefits from qualifications internationally recognised by universities and employers worldwide.

We are a not-for-profit organisation, so we devote our resources to unlocking learners' potential, and contributing to society through the pursuit of education, learning and research at the highest level.

An aligned system of education

We believe education works best when **curriculum, teaching, learning** and **assessment** are closely aligned. That belief inspires the design of each aspect of Cambridge programmes.

Alignment stems from knowing what we want students to learn, understanding how we will know that learning has happened, and encouraging teaching and learning approaches that support it.





1

International curriculum

We believe in giving Cambridge schools the power to shape their curriculum around how they want students to learn.

What are schools bringing into their curriculum with Cambridge? We set out three important things we want students to develop – deep subject knowledge, conceptual understanding and higher order thinking skills. Our Cambridge Pathway is a clear framework for progression from one stage to the next.

Deep subject knowledge, conceptual understanding and higher order thinking skills

Cambridge programmes combine an emphasis on mastering subjects in depth, at the same time as developing skills for study and work in the future.

We believe in the intrinsic value of studying a subject in depth. In the words of Andreas Schleicher (2017), Director for Education and Skills, OECD: 'In top performing education systems the curriculum is not mile-wide and inch-deep, but tends to be rigorous – that is, provides a high level of cognitive demand. It's also more focused – with a few things that are taught well and in great depth and in a way that is coherent.'

Deep subject knowledge is important in order to develop the ability to solve problems, to apply understanding to new situations and to enable learners to progress to the next stage. It is especially important at Cambridge International A Level because most learners aspire to go to university, where deep subject understanding is so vital.

Regular consultation with leading higher education institutions (including Harvard, Stanford and Cambridge) has informed our work to make sure our syllabuses for learners aged 16 to 19 develop their **conceptual understanding**: a firm grasp of the subject's key concepts (see Meyer and Land 2003) and developing the skills they need to succeed at university.

We see key concepts as essential ideas that help learners develop a deep understanding of their subject and make links between different aspects. Key concepts can often transform a student's grasp of their subject, and open up new ways of thinking about, understanding or interpreting the important things to be learned. Good teaching and learning incorporate and reinforce a subject's key concepts to help learners gain:

- greater depth and breadth of subject knowledge
- confidence, especially in applying knowledge and skills in new situations
- fluency to talk about their subject conceptually and show how different aspects link together
- a level of mastery of their subject to help them enter higher education.

As well as encouraging students to develop **higher order thinking skills** within subject disciplines – problem solving, critical thinking, independent research, collaboration, presenting arguments – we believe students need to work effectively across disciplines.

Of course this ability is important not only for getting into university but for getting on in life. What's more, it makes learning and teaching enjoyable and rewarding. And the transferable skills students develop in interdisciplinary programmes like Cambridge Global Perspectives™ reinforce their understanding and skills within subject disciplines.

Progression

We offer a coherent curriculum with clear progression at each stage, for students aged 3 to 19. We identify clearly what we want students to learn at each stage. At each stage, students build on their previous learning – a 'spiral approach' that reinforces what students have learned, while at the same time taking them forward. We design each syllabus with this spiral approach in mind.

Choice and flexibility

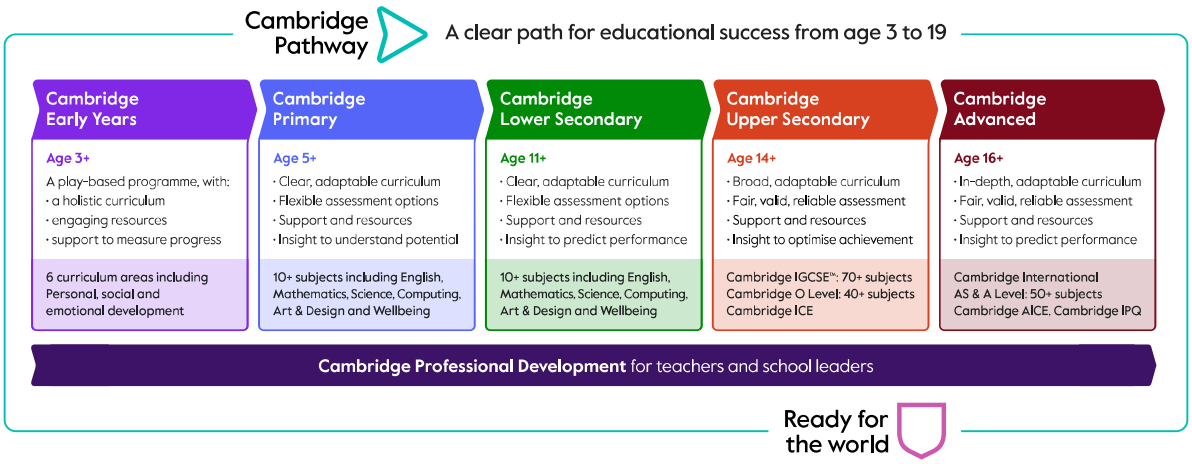
We believe that empowering students by allowing them to personalise their learning programme helps build motivation throughout their studies and nurtures their love of learning.

In a recent survey, 100% of university admissions tutors told us that Cambridge programmes are an excellent preparation for university and help students succeed when they get to university. They also told us Cambridge students:

- think logically and are able to form ordered and coherent arguments
- are able to think critically
- are able to present reasoned explanations, understand implications and communicate them logically
- have in-depth knowledge of their subject.

We see our role as supporting schools to develop a curriculum that suits their context, culture and ethos, and that they can tailor to their students' needs. This is why we offer such a wide range of subjects: over 70 at the Cambridge Upper Secondary stage (Cambridge IGCSE™ and Cambridge O Level) and over 55 at Cambridge Advanced (Cambridge International AS & A Level).

The structure and breadth of our programmes, therefore, makes sure that schools can offer students the choices and combinations of subjects that match their strengths and interests, rather than imposing a narrow or broad range of subjects.



Multilingual education

We value multilingualism and believe that there are many benefits to being bilingual or multilingual – for students, society and schools. We see every learner as a language learner. Language plays an important role in the school curriculum, either as a subject or as a medium of teaching and learning. Similarly, every teacher is a language teacher, and helps students learn the language they need to succeed in their non-language subjects.

At Cambridge, we support schools and partners to implement bilingual education. Cambridge programmes are often used for the English medium strand of a bilingual programme, and we offer curriculum and assessment for English as a second language for students aged 5 to 16.





Our wide subject range includes a large number of languages – currently, Cambridge IGCSEs are available in more than 30 languages.

We provide professional development in multilingual education to support our curriculum and assessment offer. We offer courses on teaching bilingual learners, language awareness, as well as training around specific language syllabuses. We have a dedicated section on our website called 'Bilingual education'.

The wider Cambridge University Press & Assessment Group offers many options to support bilingual learners. The English group provides the world's leading range of qualifications and tests for learners and teachers of English, including IELTS. More than 5.5 million people take Cambridge English Qualifications and tests every year.



2

Teaching and learning

We design Cambridge programmes to support the development of learners who are confident, responsible, reflective, innovative and engaged – the attributes of the Cambridge learner.

What are our aspirations for students when they leave school? This question was the starting point for the development of the Cambridge learner attributes, introduced in 2011. The purpose of these attributes is to support the development of five powerful and highly desirable habits that will inspire students to love learning. This in turn helps them to achieve success in school, higher education, the workplace and life in general.

Learning habits describe how students approach situations, environments and challenges. They include a combination of values, attitudes, knowledge, skills and strategies. They also assume competence, which is the skilled and appropriate application of the attribute.

We know that, in isolation, these attributes are not new. Most education professionals see developing them as part of their job. But in setting out the Cambridge learner attributes, we have created a list of desirable outcomes intended to encourage schools to support these habits. They also help us to design challenging and relevant qualifications and professional development programmes.

Learning to learn

Put simply, learning happens when students think hard (see Husbands 2014), mobilising a number of different mental processes and resources that are both cognitive (such as reasoning and memory) and affective (emotional resources that include habits in learning).

Learning habits matter. 'Non-cognitive skills' (see Kautz et al 2014) include personal qualities such as perseverance, self-control, attentiveness, resilience to adversity, openness to experience, empathy and tolerance of diverse opinions. They:

- predict life outcomes at least as well as or better than traditional measures of cognition
- have positive and strong effects on educational attainment and also additional significant beneficial effects on important workplace and life outcomes
- can be enhanced, and there are proven and effective ways to do so.

Research shows that engaging students in their own learning – for example, via **metacognition** and **active learning** – improves outcomes. As the Cambridge learner attributes suggest, we encourage students to reflect on their learning, so they can articulate where they are in the learning process, and plan and control their learning strategies. The Cambridge learner

attributes also provide a cross-curricular language and set of expectations for all students and teachers to engage with.

Metacognition describes the processes involved when learners plan, monitor, evaluate and make changes to their own learning behaviours. The 'meta' refers to higher order cognition about cognition, or 'thinking about thinking'. Metacognition helps students become independent learners. It has a positive impact on learning, over and above the influence of intellectual ability.

Cambridge helps schools develop students' metacognition. Syllabus design is informed by research evidence about metacognition. Cambridge Global Perspectives programmes support learners in the process towards metacognition. Cambridge Professional Development Qualifications encourage and support metacognitive practices in teachers and school leaders.

For Cambridge, **active learning** fosters understanding, rather than rote learning facts. Students can apply this understanding to diverse contexts and problems. Active learning fosters students' learning and their autonomy, giving them great involvement and control over their learning and giving them skills for lifelong learning.

Also, learners are better able to revise for exams, because they already understand the ideas. Cambridge programmes not only develop and assess retention of knowledge, but also ask learners to draw on their understanding so they can analyse, evaluate and synthesise ideas. Active learning is also a key part of the professional development we offer, both via our Professional Development Qualifications and shorter courses.

Cambridge learner attributes

Confident in working with information and ideas – their own and those of others

Cambridge students are confident, secure in their knowledge, unwilling to take things for granted and ready to take intellectual risks. They are keen to explore and evaluate ideas and arguments in a structured, critical and analytical way. They are able to communicate and defend views and opinions as well as respect those of others.

Responsible for themselves, responsive to and respectful of others

Cambridge students take ownership of their learning, set targets and insist on intellectual integrity. They are collaborative and supportive. They understand that their actions have impacts on others and on the environment. They appreciate the importance of culture, context and community.

Reflective as learners, developing their ability to learn

Cambridge students understand themselves as learners. They are concerned with the processes as well as the products of their learning and develop the awareness and strategies to be lifelong learners.

Innovative and equipped for new and future challenges

Cambridge students welcome new challenges and meet them resourcefully, creatively and imaginatively. They are capable of applying their knowledge and understanding to solve new and unfamiliar problems. They can adapt flexibly to new situations requiring new ways of thinking.

Engaged intellectually and socially, ready to make a difference

Cambridge students are alive with curiosity, embody a spirit of enquiry and want to dig more deeply. They are keen to learn new skills and are receptive to new ideas. They work well independently but also with others. They are equipped to participate constructively in society and the economy – locally, nationally and globally.

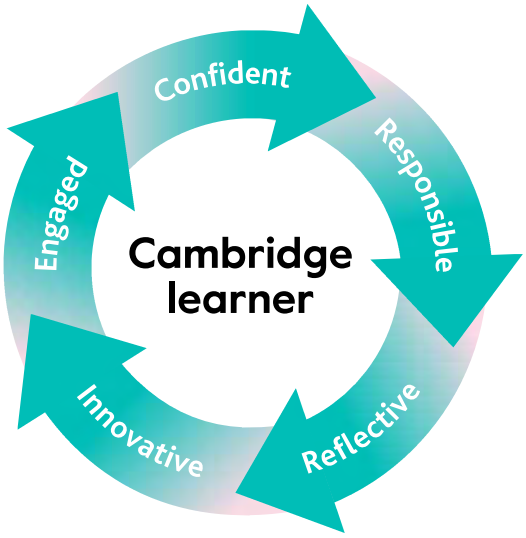
Helping teachers improve

Cambridge supports teachers to become:

- **confident** in teaching their subject and engaging each student in learning
- **responsible** for themselves, responsive to and respectful of others
- **reflective** as learners themselves, developing their practice
- **innovative** and equipped for new and future challenges
- **engaged** intellectually, professionally and socially, ready to make a difference.

The overwhelming body of research finds that the most important factor in improving student outcomes is good teaching. Teaching, and matching the teaching approach to the needs of students, is clearly the responsibility of each school. Different schools work in different contexts, and they know what is best for their students and teachers. An important part of our mission, therefore, is to help schools develop their teachers' classroom practice.

We believe effective teaching and learning can encompass a variety of approaches. Our professional development is designed to reflect that, so that it can help teachers in a variety of educational contexts improve their performance and practice – and therefore improve student outcomes – throughout their careers.



Teachers and school leaders need to develop their professional thinking and practice continually. That is why we invest heavily in providing a variety of high-quality, affordable routes for professional development.

We hold over 2000 training events worldwide every year, both face-to-face and online. Some of these training events focus on exams taken by our students. Other events focus on enriching teachers' own professional practice. Our popular Cambridge Schools Conferences give teachers a chance to learn from expert educators, test out their ideas with others and build their own professional network.

Through our network of Cambridge Professional Development Centres, we provide schools, leaders and teachers with local access to high-quality and affordable Cambridge Professional Development Qualification programmes (Cambridge PDQs). Our suite of Cambridge PDQs creates a professional learning and improvement pathway for teachers and school leaders at different stages in their career. They are based on international best practice and research evidence about the kinds of professional development that have real impact and value.

3

Assessment



We recognise that assessment has two important roles: to prove and improve – to prove what students are learning, and to suggest how they can improve their understanding and skills.

Good assessment is at the heart of a good education. When we design our assessments, our starting point is what we want students to develop: deep subject knowledge, conceptual understanding, and higher level thinking skills.

For assessment to work well, the questions used to test students' understanding need to have been designed well, too. This is as true for formative assessment and 'assessment **for** learning' (the questions that teachers ask every day in the classroom) as it is for summative assessment and 'assessment **of** learning' (end-of-year tests and public exams).

Fair, valid and reliable

Our assessments enable effective differentiation of student performance, across cohorts and over time. We design our assessments to be fair, valid, reliable and practicable:

- **Fair**: all students sit exams in the same conditions, as far as possible.
- **Valid**: an assessment assesses what it is intended to assess, and avoids irrelevant matters.
- **Reliable**: if you had taken the exam on a different day, and it was marked by a different examiner, you would get the same outcome.
- **Practicable**: an exam that schools can reasonably stage without excessive arrangements; and students can reasonably sit – for example, the exam is not too long.

We follow our own Code of Practice (2017), which sets out our commitments to quality in major public exams.

Assessment of learning

Assessment of learning at the end of a programme of study can provide valuable evidence of a student's achievement. It also provides focus, pace, motivation and challenge to learners during a one- or two-year course.

Such assessment also plays a significant role both in selection for next steps in education, university and employment (and therefore in students' lives) and in accountability (and therefore in the lives of teaching professionals). We take very seriously, therefore, our responsibility in making sure all our assessments are fair, valid, reliable and practicable.

We recognise that the way we design summative assessment of learning can strongly influence what happens in the classroom. That is why we use a flexible assessment structure, allowing a 'linear' approach (all exams at the end of the course for Cambridge IGCSE and Cambridge International A Level) or a 'staged' approach (with some Cambridge International AS Level exams halfway through a two-year course).

We believe using a linear and staged approach, rather than a modular one, brings the biggest educational benefits. It maximises time for teaching and learning, so teachers have more time to engage students' interests and support their

development through assessment for learning rather than through multiple modular assessments of learning.

It also helps students develop a strong grasp of each subject as a whole, which universities value highly. We draw on research by Andrea Greve (2016) at the Cognition and Brain Sciences Unit at the University of Cambridge, which supports the view that returning to topics over a period of time supports learning better. Students have more time to revisit and understand topics and concepts, so they can go beyond cramming for a test, and really retain what they have learned. Retaining learning is essential not just for generating new ideas and solutions, but also for making connections across subject disciplines.

We believe that putting students' learning first leads to improved performance in final exams. And by taking exams when their understanding is deepest, at the end of the course, students do not face assessment before they are ready.

Assessment for learning

For Cambridge, 'assessment for learning' (AfL) is an approach integrated into teaching and learning that creates feedback for students to improve learning. We see AfL as a vital part of effective teaching practice.

By following well-designed approaches to AfL, teachers can understand better how their students are learning and use it to plan what they will do next with a class or individual students. AfL also helps the learner to see what they are aiming for and understand what they need to do to achieve those aims. AfL therefore focuses on the teacher and the learner understanding.

What are the **benefits of AfL**? AfL connects assessment and teaching objectives – clarifying assessment objectives provides a clear focus for teaching and learning strategies. AfL, effectively implemented, can support students to become confident, reflective, innovative and engaged (at least four of the Cambridge learner attributes). Research by John Hattie (2009) shows that feedback improves learner achievement (ranked 10th out of 150 factors), particularly if it involves feedback from learner to teacher about their own learning.

Cambridge supports AfL in different ways. Our clear curriculum frameworks and syllabuses, with clear learning and assessment objectives, help teachers, at varying levels of experience, point learners to what they need to focus on. Assessment for our Cambridge Primary and Lower Secondary programmes helps learners and teachers assess progress and provide feedback on strengths and weaknesses in the core subjects of English, maths and science. We support teachers' own learning about AfL via our online course, subject-based training and all Cambridge Professional Development Qualifications.

Supporting speakers of English as a second or foreign language

Our assessments are in the medium of English. We design those assessments very carefully to make sure they are accessible to speakers of English as a second or foreign language – both in terms of language and cultural references. Our questions use clear language.

For example, questions in Cambridge International AS & A Level Mathematics use fewer command words than any other international A Level. Command words explain what students need to do, such as 'calculate', 'define', 'evaluate'. We make sure that each command word relates directly to the relevant assessment objectives and is used consistently within and across syllabuses. More and more of our syllabuses give definitions for each command word we use, so students and teachers can understand the scope, nature and depth of treatment examiners are looking for in a response.

Command	General definition
Calculate	work out from given facts, figures or information
Define	give precise meaning
Evaluate	judge or calculate the quality, importance, amount, or value of something

A list of command words and their definitions is available on our website.



4

International recognition

It is vital that Cambridge students can be confident that their qualifications will be understood and valued throughout their education and career, in their home country and internationally.

We understand that, as an organisation, we have an important role to play in helping universities worldwide understand our curriculum and assessments, and what the grades that educators and students work so hard to achieve really mean.

Cambridge qualifications are accepted by universities all around the world. Our global team of recognitions managers works with universities worldwide to help them understand our curriculum and assessments. We also communicate regularly with government authorities to understand their national context and needs.

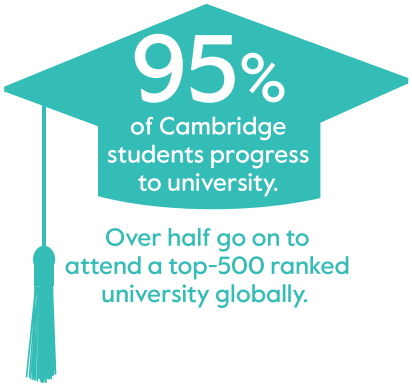
Working closely with universities and governments ensures a smooth progression for all our students, whether they wish to study in their home country or abroad.

Universities understand the demand of our curricula and the rigour of our assessments. Over 2350 universities in 90 countries formally recognise Cambridge qualifications, including all UK universities and over 1000 in the US (including all the Ivy League), plus key universities in other major higher education destinations such as Canada, Australia, Singapore, South Africa, Germany and the Netherlands.

In the UK, all universities accept Cambridge International AS & A Levels in exactly the same way as the UK AS and A Levels. We are continually building relationships with universities and other higher education institutions so that we can create yet more opportunities for students.

For example, because the US is one of the main destinations for internationally mobile students, we founded a US Higher Education Advisory Council (HEAC) to advise us on expanding recognition of Cambridge programmes in US universities, and to feed into development of our Cambridge Advanced programmes.

The current membership includes representatives from top US universities, including Brown University, Columbia University, Duke University, Florida State University, Massachusetts Institute of Technology, Rice University, University of Arizona, University of California, University of Maryland, University of Southern California, University of Virginia, University of Washington and Vanderbilt University.





5

Global community

We believe one of the benefits of being a Cambridge school is belonging to a worldwide education community. Nearly a million learners from 10 000 schools in 160 countries are currently preparing for their future with our programmes and qualifications.

We listen to and involve our global community of schools to make sure our programmes are rigorous, relevant and world class. We use feedback from our school community to help us improve what we do.

We support professional learning communities which connect teachers around the world so they can share views, information and resources, and learn from one another. Some of these communities are online. For example, subject communities use our popular discussion forums on our support site for teachers.

Our Cambridge Global Perspectives community uses a secure online learning area to share approaches with teachers in other countries, and it is a safe space for students to share perspectives with students in another school, in another country, as part of the programme.

We organise a range of community events for Cambridge school leaders and teachers, including local, regional and global conferences every year, where schools are encouraged to take part and lead discussions.

We organise over 2000 training events every year globally, and the number is growing in response to demand from schools. These events can either be online or face to face, and encourage teachers and school leaders to learn from experts and each other. Face-to-face events usually take place within a Cambridge school.

We support Cambridge schools to set up their own local community of schools, run by schools for schools. They work together to exchange ideas, and to share knowledge and best practice in areas such as school leadership, curriculum planning, professional development and teaching. Working together the community may:

- improve the quality of member schools through exchanging ideas and sharing knowledge and best practice
- support schools new to Cambridge or experiencing change – for example, when they introduce a new Cambridge programme
- form a collective voice to feed back issues to us, including the views of parents and students; or to influence local governing bodies and higher education about the value of international education and Cambridge programmes
- organise shared training opportunities or events for students – for example, sports days or debating societies.



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CAMBRIDGE

Cambridge International AS & A Level
Opening doors to a world of opportunities

Cambridge International AS & A Level opens doors to a world of opportunities, helping your child develop the knowledge and skills they need to achieve at school, university and work. Typically for students aged 16 to 19, it is perfect for learners who need advanced study to prepare for higher education.

We have built Cambridge International AS & A Level around what matters most to your child as they progress through their education.

A love of learning

Your child can choose from a range of 55 subjects, meaning they can study what they enjoy and are good at. As well as a deep understanding of the subjects they study, they will develop independent learning and critical thinking skills – abilities that universities value highly.

Cambridge International AS & A Level is a two-year course, though students can complete AS Level in one year. Your school can choose to offer Cambridge International AS Level qualifications in their own right, or as a way to progress to Cambridge International A Level.

An aligned programme based on the latest research

We believe education works best when curriculum, teaching and learning, resources and assessment are closely aligned and encourage personal growth and wellbeing.



With this approach, teachers can support your child – by providing additional guidance to build understanding and confidence, or offering stretch and challenge, helping them to reach their potential and thrive.

Cambridge Pathway — A clear path for educational success from age 3 to 19

Cambridge Early Years	Cambridge Primary	Cambridge Lower Secondary	Cambridge Upper Secondary	Cambridge Advanced
Age 3+ A play-based programme, with: · a holistic curriculum · engaging resources · support to measure progress	Age 5+ · Clear, adaptable curriculum · Flexible assessment options · Support and resources · Insight to understand potential	Age 11+ · Clear, adaptable curriculum · Flexible assessment options · Support and resources · Insight to predict performance	Age 14+ · Broad, adaptable curriculum · Fair, valid, reliable assessment · Support and resources · Insight to optimise achievement	Age 16+ · In-depth, adaptable curriculum · Fair, valid, reliable assessment · Support and resources · Insight to predict performance
6 curriculum areas including Personal, social and emotional development	10+ subjects including English, Mathematics, Science, Computing, Art & Design and Wellbeing	10+ subjects including English, Mathematics, Science, Computing, Art & Design and Wellbeing	Cambridge IGCSE™: 70+ subjects Cambridge O Level: 40+ subjects Cambridge ICE	Cambridge International AS & A Level: 50+ subjects Cambridge AICE, Cambridge IPQ

Cambridge Professional Development for teachers and school leaders

Ready for the world

Continued ▶

Cambridge International AS & A Level
Opening doors to a world of opportunities continued

An international education

We design Cambridge International AS & A Levels for an international audience, making them ideal for learners whose first language is not English.

Fair and meaningful assessments for every student

We work hard to make sure that our assessments are fair for all students in every country – especially as many of our learners are non-native English speakers. This means using simple language and layouts, as well as clear command words.

Assessment takes place at the end of the course. Your child will be assessed in different ways, including written, oral, coursework and practical options, giving them the best opportunity to demonstrate their knowledge and skills, especially if English is not their first language.

Cambridge International A Level is graded A* to E. Cambridge International AS Level is graded A to E. We offer a linear assessment model, with exams at the end of the course. This gives your child more time to develop a deeper understanding of their subject.

Your school can also use our Cambridge Alis assessments, designed to help teachers gain deeper understanding of your child's strengths, weaknesses and potential, and the support they might need to prepare for their Cambridge International AS & A Levels.



Recognised and valued worldwide

Every year Cambridge International AS & A Levels help thousands of learners to gain places at leading universities around the world. From the world's top-ranked universities to local higher education institutions, Cambridge qualifications open doors to a world of opportunities, helping to prepare your child with the skills they need to thrive at university and beyond.

The world's best higher education institutions recognise our qualifications and value the critical thinking skills, independent research abilities and deep subject knowledge that Cambridge learners bring and help them to succeed at university.

A global learning community

With the Cambridge Pathway, your child is joining a global community of learners from more than 10 000 schools in over 160 countries. By working with our wider community, your teachers can connect with other schools from around the world to share best practice.

Learning with lasting impact

We recognise that meaningful education is more than just building subject knowledge and conceptual understanding. To thrive in life, learners must also develop a broad range of skills, values, attitudes and behaviours.

When developing our Cambridge International AS & A Level programmes, assessments and resources, we build in plenty of opportunities to help schools develop reflective and innovative learners with the confidence to embrace new information, ideas and challenges. Responsible and respectful of others, they are engaged intellectually and socially – ready to make a positive impact.

With these attributes, we are helping your child be ready for the world.

Hear more from Cambridge International AS & A Level alumni

Learn more! For more information, visit **www.cambridgeinternational.org/advanced** or contact your school.

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AICE Planning Sheet
Course Progression Options

Student Name: _____ Class of: _____

High School Credits Earned in Middle School: _____ Course(s): _____

The AICE curriculum requires a total of **SEVEN** AICE courses between grades 9-11 or grades 10-12 with at least one course and one exam from each of the three subject groupings, as well as one in the core group. Students may take as many AICE courses as desired, if there is a teacher recommendation and the minimum requirement (7) is met. AS exams count as one point toward the diploma. AL exams count as two points toward the diploma. You must earn the seven required credits during a 25-month period. Required courses are in bold.

First Year Schedule:		**Second Year Schedule:**	
	AICE English General Paper		**AICE English Language**
	AICE Thinking Skills (Academic Elective)		**AICE International History**
	Pre-AICE Math 1 (Algebra I), 2 (Geometry) or Algebra 2 Honors		Pre-AICE Math 2 (Geometry), Algebra 2 Honors, or Other Math
	Pre-AICE Biology, Chemistry Honors, or Marine Science Honors (Magnet)		Chemistry Honors, **AICE Biology**, **AICE Marine Science AS**, or **AICE Environmental Management**
	Pre-AICE World Language (Spanish, French or Chinese)		Pre-AICE World Language 2 (Spanish, French or Chinese)
	AP Human Geography		Academic Elective _____
	Elective _____		Elective _____

Third Year Schedule:

	AICE Global Perspectives
	AICE English Literature
	AICE U.S. History
	AICE Math, AP Statistics, AP Calculus AB or BC
	AICE Marine Science AL, **AICE Biology**, **AICE Environmental Science**, or AP Physics
	Academic Elective _____
	Elective _____



CAMBRIDGE
International Education

For exams officers

Cambridge Handbook 2025

Regulations and guidance for administering Cambridge exams

Includes:

- Cambridge Primary Checkpoint and Lower Secondary Checkpoint
- Cambridge IGCSE™
- Cambridge O Level
- Cambridge International AS & A Level
- Cambridge Professional Development Qualifications.

Valid for exams in 2025



This is an interactive guide

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Introduction

This handbook explains all the administrative tasks you need to carry out during each exam series. It also sets out the regulations for running our exams and assessments. It details the responsibilities of centres and Cambridge Associates, and forms part of the legal contract between Cambridge and the centre/Cambridge Associate.

Our regulations exist to make sure Cambridge candidates all over the world have the same exam experience and are treated equally and fairly. It is essential that you follow them carefully. Exams officers should use the handbook to make sure they are running our exams and assessments according to our regulations. Principals and heads of Cambridge Associates should use it to make sure their organisation complies with our regulations. A breach of these regulations may lead us to terminate your Agreement.

This handbook covers the following qualification groups.

Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint

Regulations for conducting Cambridge Primary Checkpoint and Lower Secondary Checkpoint, and guidance on administering the tests, are in this handbook.

Cambridge Upper Secondary

- Cambridge International General Certificate of Secondary Education (Cambridge IGCSE).
- Cambridge International General Certificate of Secondary Education (Cambridge IGCSE (9–1)).
- Cambridge International General Certificate of Secondary Education (Cambridge IGCSE (Core)).
- Cambridge General Certificate of Education (Cambridge O Level).
- Cambridge International Certificate of Education (Cambridge ICE).

Cambridge Advanced

- Cambridge International General Certificate of Education (Cambridge International AS Level).
- Cambridge International General Certificate of Education (Cambridge International A Level).
- Cambridge Advanced International Certificate of Education Diploma (Cambridge AICE Diploma).
- Cambridge International Project Qualification (CIPQ). Guidance for administering CIPQ is in the Administrative Guide: Using Submit for Assessment available from www.cambridgeinternational.org/eoguide

Cambridge Professional Development Qualifications

Regulations for conducting Cambridge Professional Development Qualifications (PDQs) (for teachers and trainers) are in this handbook. Guidance for administering the qualifications is in the Cambridge Professional Development Qualifications Administrative Guide available from www.cambridgeinternational.org/eoguide

This handbook is divided into the following sections:

- an overview of the Cambridge Exams Cycle
- the responsibilities of centres and Cambridge Associates
- a section for each phase of the Cambridge Exams Cycle detailing the regulations and administrative tasks that apply
- A to Z of terms to clearly explain the meaning of the key words and phrases we use throughout the handbook
- an index so you can quickly find the page you need.

Important information

If you are a centre in India or Romania, see the Cambridge Handbook Supplement (March 2025 series) for information about our March series: www.cambridgeinternational.org/march

NEW If you are a Cambridge Early Years Centre, you should refer to the Cambridge Early Years Handbook, which is available on the School Support Hub: www.cambridgeinternational.org/support

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A If you work in an Associate Centre you need to comply with any extra local arrangements required by your Cambridge Associate.

We reserve the right to amend or vary the arrangements detailed in this handbook at any time. We will notify you of any changes. Please make sure we have your up-to-date contact details. The changes will take immediate effect unless otherwise stated.

UK If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025 for information about the Joint Council for Qualifications (JCQ).

Important information

We are withdrawing Cambridge ICT Starters. The last entry submission date for all modules will be 25 February 2025 for results release on 30 April 2025. We have replaced Cambridge ICT Starters with our Computing and Digital Literacy curricula, which are already available to registered Cambridge centres.

Key to icons

To make it easier for you to find the information you need quickly we have developed a set of icons.

- **Administrative forms:** Appears next to the administrative forms referenced on the page
- **Cambridge Checkpoint:** Appears next to regulations and procedures for Cambridge Primary Checkpoint and Lower Secondary Checkpoint
- **Check UK supplement:** Highlights where a UK centre needs to check the UK supplement
- **Check PDQ Administrative Guide:** Highlights where a PDQ centre needs to check the PDQ Administrative Guide
- **Extra guidance:** Highlights extra support available, for example online tutorials or 'how to' guides
- **For Cambridge Associates and their Associate Centres:** Differences to processes for Cambridge Associates and their Associate Centres
- **Important dates:** Highlights key dates and deadlines
- **Important information:** Highlights key pieces of information
- **New or updated information:** Highlights information that has changed from last year
- **Regulations:** Highlights regulations that you must follow

Economic Operators Registration and Identification (EORI) number for centres in the EU

If you are a centre in the EU, it is very important that you apply for an EORI number so that we can still send exam materials you need and issue your results on time. This is an identification number used in all customs procedures when exchanging information with customs administrations. For guidance, visit www.cambridgeinternational.org/eori and the European Commission website www.ec.europa.eu

NEW VAT ID numbers for centres in the EU

If you are a centre in the EU, it is very important that you provide us with a VAT ID number so that we can send exam materials you need and issue your results on time.

You can look up the format of your country's VAT ID number in the 'Example of EU VAT identification numbers' table on this EU website: https://shorturl.at/oUGkn

If your centre is exempt from VAT, you must also tell us.

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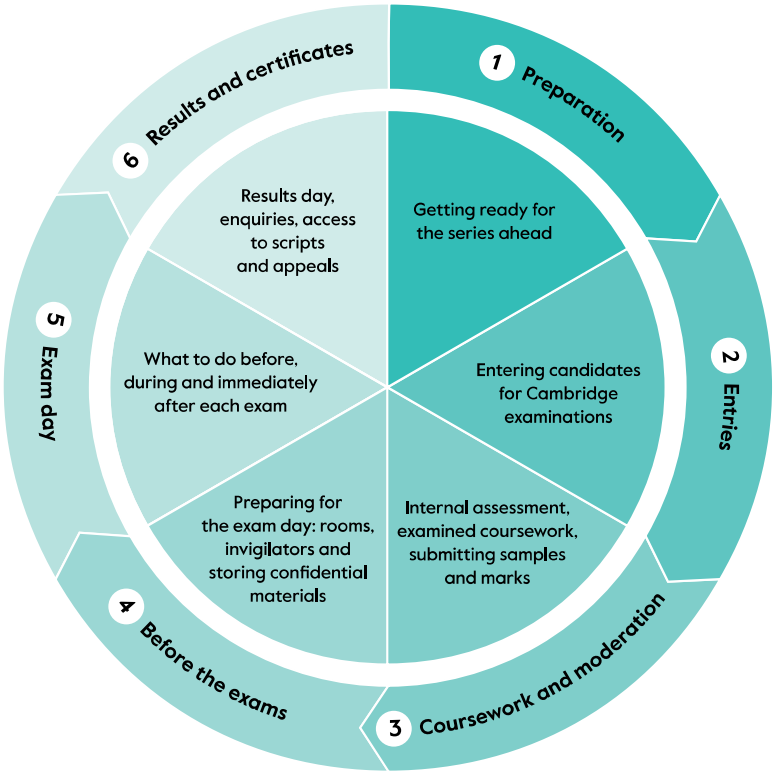
The Cambridge Exams Cycle



There are many different activities that need to take place to successfully deliver an exam. Sometimes, it can be challenging to remember what needs to happen when. We run several exam series a year so many of our exams officers are managing different processes for different series at the same time. Our processes are grouped into six phases to help you keep track of what you need to do when. We call this the 'Cambridge Exams Cycle'.

The cycle includes every phase of the process from the planning and preparation that takes place before you enter your candidates, to giving your candidates their certificates. The cycle has six phases:

1 Preparation

2 Entries

3 Coursework and moderation

4 Before the exams

5 Exam day

6 Results and certificates

All our support for exams officers is structured around this exams cycle, so at a glance you can see which phase of the cycle the communication relates to – helping you prioritise and manage your workload.

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Centre and Cambridge Associate responsibilities

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Introduction

1 Cambridge International Education is an awarding body and a part of Cambridge University Press & Assessment, which is a department of the University of Cambridge.

2 This Cambridge Handbook is written in the English language; the English language text is the definitive version regardless of whether the Cambridge Handbook is translated into any other language.

3 The regulations and procedures detailed in this Cambridge Handbook apply to the examinations, assessments and qualifications provided by Cambridge International Education.

4 Throughout this Cambridge Handbook 'You' and 'Your' refer to the centre and, in the case of a Cambridge Associate, the Cambridge Associate or the Associate Centre. 'Centre' refers to the centre approved by Cambridge International Education (including Cambridge International Schools registered online and Cambridge International Schools – approved to offer Cambridge programmes online) or, in the case of a Cambridge Associate, the Cambridge Associate or the Associate Centre. 'Cambridge' and 'We' and 'Our' refer to Cambridge International Education. 'Agreement' refers to any contracts you have entered into with us for the provision of Cambridge qualifications and programmes and all subsidiary contracts incorporating the Cambridge Handbook.

5 Under the terms of your Agreement with us, you must keep to the terms and conditions set out in this Cambridge Handbook, along with the documents detailed in paragraphs 6 and 7 below.

6 By registering with us and submitting entries, you agree to be bound by the terms and conditions, processes and procedures set out in this Cambridge Handbook and all the centre registration documents and Agreements we issue.

7 We may issue:

(i) extra administrative or procedural documents, or

(ii) instructions for the conduct of specific assessments (for example, written papers, coursework, orals and practicals).

Such documents also form part of the Agreement.

8 We reserve the right to alter the Cambridge Handbook and any of our other documentation, with any changes taking immediate effect unless otherwise stated. We will let you know about any changes. You must make sure you are using the most recent version of the Cambridge Handbook, which is available on our website: www.cambridgeinternational.org/eoguide

9 All services we provide are conditional on the payment of all fees due, in accordance with our payment terms and the Agreement.

10 This Cambridge Handbook is interpreted in accordance with the jurisdiction and governing law provisions as set out in our Agreement with you.

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11 Where you are providing approved programmes as a registered fully online school, references in this handbook to assessments and examinations, or results, will not apply as you are not approved to run any assessments or examinations. **NEW** The exception to this is if you are a Cambridge International School – registered as online (with exam venues). See page 167 for our definition of an online school, or schools approved to offer qualifications online.

UK If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025 for information about the Joint Council for Qualifications (JCQ).

Important information

Any fees referred to in this Cambridge Handbook are in our fees list, which is published in the 'My Messages' section of Direct, or listed as paid-for services available through any password-protected Cambridge websites. Fees may be updated from time to time. You should always refer to the updated fees list on Direct. **NEW** If you are a Cambridge Early Years Centre or Cambridge International School – registered as online, we send the fees list to you.

A Centre responsibilities

A1 You are responsible for the administration and conduct of our assessments. For online schools see section 2.1.2.

A2 The Responsible Person must tell us the name of the Head of Centre and any restrictions to the Head of Centre's powers to carry out their centre's responsibilities.

A3 The Responsible Person, acting through the Head of Centre, is responsible for appointing an appropriately qualified exams officer to effectively and securely administer our exams.

A4 Every member of a centre's staff who has contact with candidates must be a suitable person to be working with children and, if relevant, vulnerable adults. You must make any checks you can to make sure of this, which must include complying with local laws and employment regulations.

A5 You must provide a safe environment for your candidates. This includes while they are on your premises, as well as promoting online safety and wellbeing where applicable. You can find more guidance on our website: www.cambridgeinternational.org/about-us/our-standards/safeguarding

A6 You must not offer courses leading to any Cambridge qualification without first obtaining our written approval.

A7 You must have:

A7.1 a workforce of the appropriate size and competence to undertake the delivery of courses leading up to any programme or qualification as described in the syllabus or otherwise required by us, or by the law where you are located, and

A7.2 sufficient managerial and other resources to enable you to effectively and efficiently undertake the delivery of the assessments, including providing for the professional development of the exams officer.

A8 If you want to offer a type of qualification beyond those initially approved by us, for example you are approved to offer Cambridge IGCSEs and now want to offer Cambridge International A Levels, or where you wish to offer online programmes in addition to the programmes you have been approved to offer at your premises (or vice versa), you must request our approval by completing and submitting our Additional Qualification Types: Preparation – Form 5.

If you want to offer a science syllabus with a practical component in any of your approved qualification types you must complete and submit Additional Qualification Types: Preparation – Form 5.

Administrative forms

NEW Forms available on Direct.

- Additional Qualification Types: Preparation – Form 5
- Add Eligibility to Deliver Cambridge Programmes Online: Preparation – Form 9

A9 If you want to offer Cambridge programmes online to students who would not normally attend your school's physical premises, you must apply to extend your eligibility. All your students studying fully online must still be registered with your school and sit their exams at your centre.

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NEW To extend your eligibility, complete our form: Add Eligibility to Deliver Cambridge Programmes Online: Preparation – Form 9.

See page 167 for our definition of a Cambridge International School that is also approved to offer Cambridge programmes fully online.

You do not need to request approval if you are teaching your existing students online, who would otherwise attend your school in person, for a temporary period or as part of a blended approach to the curriculum.

A10 You must tell us immediately if the location of your premises or secure storage facilities changes. NEW You should do this by completing the relevant form on Direct. We will not accept notification of changes by telephone or email.

A11 You must tell us immediately about changes to contact details, including email addresses and telephone numbers, for your centre and any individual members of staff listed on the School Details Form. You can do this by completing the School Details Form on Direct. We will not accept notification of changes by telephone.

A12 NEW You must tell us immediately if the ownership or legal identity for your centre changes. You should do this by completing the relevant form on Direct. We will not accept notification of changes by telephone or email.

A13 You must make sure that:

A13.1 the correct version, including the year and series, of the syllabus is administered for each series, and

A13.2 all teachers and tutors involved in the delivery of qualifications understand the subject area concerned.

A14 If you do not keep to the processes and procedures set out in this Cambridge Handbook, we will be entitled to take appropriate action, which may include:

A14.1 requiring you to take remedial action

A14.2 requiring you to undergo further inspection and quality assurance visits

A14.3 removing your centre's eligibility to enter for some or all of our qualifications, or

A14.4 removing your centre status and terminating any Agreement we have with you.

Important information

If you do not meet our registration standards, regulations and guidelines, it may be appropriate for us to terminate our Agreement with you.

If this happens, you must immediately:

- tell parents or guardians, students and other awarding bodies
- remove all Cambridge branding from your website, social media accounts, marketing materials, any other documentation, and your premises
- make no further entries for students
- cooperate with us to minimise disruption to candidates.

See the Consequences of Termination clause of the Cambridge Standard Terms of School Registration (we share these with you once you are an approved Cambridge International School).

A15 UK It is your responsibility to pay for any outstanding customs duties, brokers' fees, local taxes, courier handling charges and other amounts payable in connection with the importation of materials when you receive them from us. You can choose to allocate a broker to handle such imports or nominate UPS/DHL to act on your behalf, but you will be responsible for these costs and for liaising with any such brokers or couriers. It will not be our responsibility to pay for, or communicate with, any such brokers or couriers on your behalf. We will not upload question papers via Digital File Despatch if your question papers are delayed in customs because you have not put the correct process in place with brokers or couriers. We will ask for evidence of your engagement with, and completion of, all necessary processes in your country before we upload any question papers to Digital File Despatch. We will not send you any materials via Digital File Despatch without this evidence.

NEW However, in some territories where you nominate UPS/DHL to act on your behalf, we will pay customs duties, brokers' fees, local taxes, courier handling charges and other amounts payable in connection with the importation of materials on your behalf and recharge these to you via an invoice payable under the usual terms. For more information on whether this approach is used in your territory, please refer to our website, which is updated from time to time.

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It is not possible for us to pay for these charges on your behalf:

- if you choose to allocate a broker that is not UPS / DHL
- if your country is not listed on our website, or UPS / DHL does not offer that service to us.

It is also not possible to opt in or opt out of Cambridge paying these charges, although you may nominate a broker that is not UPS / DHL and pay the charges directly to them.

This approach is entirely at the discretion of Cambridge and may be withdrawn at any time without notice, although we will endeavour to give as much notice as possible.

At all times, even where Cambridge will pay these charges on your behalf, it remains your responsibility to pay for any charges and for liaising with any brokers or couriers.

A16 If you are a centre within the EU, you must obtain a European Operators Registration and Identification (EORI) number at your own cost, and provide us with that number promptly. If you do not provide your EORI number, we will not be able to send you the necessary exam materials, and we are not responsible for any loss or damage you suffer as a result.
NEW You must also provide us with a VAT ID number. If you do not provide this number (or tell us that your centre is exempt from VAT), it may delay your exam materials in customs.

You can look up the format of your country's VAT ID number in the 'Example of EU VAT identification numbers' table on this EU website: https://shorturl.at/oUGkn

A17 We are entitled to ask you to pay for inspections, other quality assurance checks and activities where these are deemed necessary as a result of your actions or inaction.

A18 Where we suffer loss or damage by your actions or inaction, particularly where such action or inaction relates to malpractice, whether negligent or otherwise, we are entitled to ask you to pay our costs and to reimburse us in accordance with the terms of our Agreement.

A19 You must establish, maintain, publish and at all times comply with a written complaints procedure. Your complaints procedure must include procedures for your candidates and timescales for responding to complaints, and dealing with the subject matter of complaints.

A20 You must establish and maintain an internal process that allows candidates to challenge your decisions regarding enquiries about results or any appeals you submit to us.

A21 If any of your teaching staff are also examiners for Cambridge University Press & Assessment you must not, and make sure your staff do not:

A21.1 communicate this externally / to any candidates or third parties, or

A21.2 make any reference to this fact in any digital or printed promotional materials.

A22 You must comply at all times with all our instructions and any country-specific requirements.

A23 You must not do anything which could bring the name, reputation or interests of our organisation, our employees, our products or our services into disrepute in any way.

A24 You are responsible for the accuracy, quality and integrity of any marks or data submitted to us and agree to pay our costs in correcting any errors you tell us need correcting. By submitting any marks or data you are confirming you have carried out all accuracy, quality or integrity checks necessary and you are solely responsible for any direct or indirect consequences of us using those marks or data. Revised marks may not be accepted after the release of results.

A25 You must make sure you are aware of the deadlines we publish and follow these deadlines on behalf of your candidates.

A26 If we remove your centre's eligibility to enter any qualification, or remove your status, you must take reasonable steps to protect your candidates from the effects of these measures. This includes making sure your candidates can complete their course(s) by entering them with a registered centre offering the relevant Cambridge qualifications as soon as possible. We shall cooperate in good faith.

A27 UK See the Cambridge Handbook (UK Supplement) 2025.

B Inspections and quality assurance

B1 You must cooperate with and facilitate any visit or inspection we make, either arranged or unannounced, including giving our inspectors access to the centre's secure storage area, and examination area, even if exams are taking place when the visit or inspection takes place.

B2 You must cooperate with any quality assurance activities we may request. You must respond within the specified time frame and your answers must accurately describe the centre's premises, systems and procedures. We reserve the right to photograph the premises and material relating to assessments, including candidate work, as part of the inspection process. We may use any photographs we take to subsequently train our inspectors.

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B3 We may carry out a re-inspection if a centre changes premises or facilities, or requests to be approved to offer an additional qualification type or science syllabus with a practical component. If we do carry out a re-inspection, you will have to pay another inspection charge.

B4 Usually our inspections are unannounced and take place during a series. However, we may inspect a centre outside the main exam period. We may inspect any part of a centre's premises or systems and procedures connected with the delivery of our assessments. Additional information regarding our standard security inspection process can be found on our website: www.cambridgeinternational.org/security-inspections

B5 We may withdraw your centre status and terminate our Agreement with you if an inspection shows that you are not meeting our standards or regulations. (See section A14.)

B6 Inspectors must be accompanied by a member of centre staff at all times during their visit.

B7 Where exams are taking place on a day when your centre is otherwise closed (for example at a weekend or on a public holiday), you must make sure that unannounced inspections can still take place and that visiting inspectors can access your centre. This may include making sure that reception staff are on-site and/or providing clear signage so that inspectors can find the exam room.

B8 UK In addition to inspections you must assist us in carrying out any reasonable monitoring activities necessary for the secure and effective delivery of the assessments.

B9 Inspection Report Forms and outcomes are confidential between centres and Cambridge and must not be shared outside of the centre, e.g. on local news forums or social media.

C Candidates

C1 We do not communicate directly with candidates or their parents/guardians about our programmes, qualifications or the administration of exams. You must communicate with candidates on every aspect of our programmes, qualifications and assessments.

C2 You must provide your candidates with:

- C2.1 access to your Privacy Notice and make them aware of ours, if required
- C2.2 the dates and times of their assessments including periods of Full Centre Supervision
- C2.3 confirmation and details of their entry for each assessment
- C2.4 confirmation and details of their results for each assessment, and
- C2.5 every result and every certificate we issue for them.

C3 You must not enter any candidate for any of our assessments before you receive full payment of their entry fee (if this applies to your centre). If you do not take payment before entering a candidate, you must still pay the entry fee to us. We will not stop the candidate sitting the exam or receiving their qualification, or otherwise communicate with either party about the non-payment.

C4 You must make sure your candidates have access to suitable room(s) and specified equipment and materials for their assessments, including for assessments that involve practical tests.

C5 Before the start of any of our assessments you must confirm the identity of all the candidates present, including private candidates. You must make sure no candidate is allowed to sit any of our assessments unless they have been correctly entered as per the processes in this Cambridge Handbook.

C6 We require Cambridge International Schools registered as online, or approved to offer Cambridge programmes online, to submit specific student data to us every year. If you are approved as an online school or to offer our programmes online we will contact you with details of how and by when you need to submit this data. See page 167 for our definition of an online school, or schools approved to offer qualifications online.

C7 You are responsible for submitting your candidates' work. As part of this responsibility you must make sure that:

- C7.1 the work in every candidate's assessment submission meets the criteria in the syllabus for the series
- C7.2 candidates' work is produced, and, where appropriate, marked internally, moderated and despatched according to our instructions, and
- C7.3 every piece of work you submit is the candidates' own work and is clearly identified as such.

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C8 We take the protection of personal data seriously. In this section, 'processing', 'personal data' and special categories of personal data (sensitive data) have the meanings given to them in the UK General Data Protection Regulation (GDPR) and Data Protection Act 2018. 'Personal data' and 'sensitive personal data' are referred to as Candidate Data.

C8.1 **NEW** You must make sure that all your candidates (if they are at or above the age threshold for having capacity to give consent in their country) or their parent/guardian (as appropriate) understand that we will use their personal data (for example, their name, candidate number and where relevant audio or video evidence of a candidate's performance) for the purposes of delivering our qualifications through your centre. This includes processing exam entries and results, marking exam scripts, issuing certificates, processing enquiries about results and investigating cases of malpractice. You must also make sure that, when applications for access arrangements, special consideration or the withdrawal of entries are made, candidates (if they are at or above the age threshold for having capacity to give consent in their country) or their parent/guardian (as appropriate) understand that we will use their special categories (sensitive) of personal data for the purposes of processing these applications, and you must obtain their consent for such use. You must make sure that you keep a written record of the consent given. It is up to you to determine the format of that record; however, it must be made available to us if we ask for it.

C8.2 **NEW** You must make sure that all your: (i) candidates (if they are at or above the age threshold for having capacity to give consent in their country) or their parent/guardian (as appropriate); and (ii) teachers, exams officer, Head of Centre, invigilators, School Support coordinator or anyone else involved in the administration and conduct of our assessments, understand that we will process their personal data for the following legitimate business purposes:

C8.2.1 to carry out research, standards setting and other activities that are related to the business of delivering qualifications (including assessments), all of which are aimed at ensuring the delivery, as well as integrity and improvement, of our qualifications and the protection of candidates

C8.2.2 to understand the needs of candidates and other users of our qualifications and carry out marketing (although we will not contact candidates/parents/guardians by email without first seeking their consent)

C8.2.3 to provide training to those involved in providing educational services in relation to our qualifications, for example, teachers and examiners

C8.2.4 for internal business purposes, including managing our risks, protecting the security of personal data in our possession and carrying out internal record-keeping, audits and investigations, including into malpractice

C8.2.5 to share the personal data with other parts of our organisation, including the University of Cambridge, Cambridge University Press & Assessment, and agents and representatives (for example, examiners, consultants and sub-contractors), which process the personal data on our behalf for the purposes described in this Cambridge Handbook

C8.2.6 to share the personal data with the Universities and Colleges Admissions Service (UCAS), other universities and, where appropriate, potential employers in order to facilitate the candidate's relevant applications

C8.2.7 **NEW** to share the personal data with government or regulatory authorities for the purpose of evidencing outcomes, progression and participation in relation to Cambridge's products and services

C8.2.8 to comply with applicable law or a court order or governmental regulation or for the purpose of any criminal or other legal investigation or proceeding here or abroad.

C8.3 **NEW** You must make sure that: (i) candidates or their parent/guardian, as appropriate; and (ii) teachers, exams officer, Head of Centre, invigilators, School Support coordinator or anyone else involved in the administration and conduct of our assessments, understand that we may use anonymised data (that is, data that does not identify a candidate) and pseudonymised data (that is, data that is anonymous to the people who receive it) for research purposes, and may share that data with third parties, also for research purposes. The third-party recipients of such anonymised or pseudonymised data are required to abide by strict data protection principles in their handling of the data and are also bound by a duty of confidentiality.

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C8.4 **NEW** You must make sure that: (i) all candidates or their parent/guardian, as appropriate; and (ii) teachers, exams officer, Head of Centre, invigilators, School Support coordinator or anyone else involved in the administration and conduct of our assessments, understand that we may transfer Candidate Data outside the United Kingdom and/or European Economic Area (EEA), for example for the processing of entries and results, and to provide Customer Services support. Such transfers of data are conducted in accordance with the Standard Contractual Clauses approved by the European Commission or in accordance with the UK's equivalent Standard Contractual Clauses.

D Exam administration

D1 We do not have to make any entries, or comply with any requests made under this section D, where you have failed to meet a specific deadline. To make sure exams are administered effectively you must, by the deadlines set out in this Cambridge Handbook, or otherwise communicated by us, send us:

- D1.1 details of estimated and actual entries
- D1.2 marks for internally assessed components and any required moderation samples, and
- D1.3 any other information that we have asked for in our instructions, for example forecast grades.

D2 If you want to make any application for access arrangements or special consideration you must follow the regulations set out in sections 1.3 and 5.5 of this Cambridge Handbook.

D3 If you want to make changes to the venue or timetable you must follow the regulations set out in sections 1.2 and 2.6 of this Cambridge Handbook.

D4 UK If your centre is in administrative zone 4 or 5, we may specify that some exams must be taken during an evening session. The Key Time for that evening session will be specified at www.cambridgeinternational.org/keytimes

D5 You must comply with any request from us to reschedule assessments from the times previously published to ensure the integrity and security of assessments. If you cannot comply with the request, you must apply for a timetable deviation ensuring that Full Centre Supervision is guaranteed. Any arrangement must be approved by us in advance.

D6 You must make sure that you limit access to My Cambridge to appropriate members of staff in your centre. You must also make sure that all staff accessing My Cambridge have read and comply with any relevant guidance produced for the action they wish to perform (for example, a relevant administrative guide or supplementary regulations). See section 1.1.15 for more information about My Cambridge.

D7 You must keep the exam materials secure at all times after you have received them. You must check that you have received the correct versions of materials for your administrative zone. You must carry out the following in accordance with our regulations:

- D7.1 secure storage of all exam materials
- D7.2 distribution of exam papers to candidates
- D7.3 collection of scripts, question papers and any other exam material at the end of each exam, and
- D7.4 secure return of scripts.

D8 You must appoint suitable invigilators and must make sure exams are carried out in accordance with this Cambridge Handbook. You are responsible for any costs associated with this.

D9 You must make sure all staff directly involved with the administration of exams understand Key Time and Full Centre Supervision regulations. Candidates must be constantly and effectively supervised during any exam, or period of Full Centre Supervision, to ensure compliance with Key Time regulations.

D10 You will work with us to prevent malpractice and, in particular, you must:

- D10.1 make sure candidates and centre staff are aware of the actions that would constitute malpractice; see section 5.6
- D10.2 make sure centre staff understand the security window for confidential exam material; see section 5.3.2
- D10.3 immediately report any established, suspected or alleged cases of malpractice
- D10.4 assist in any investigation into suspected malpractice
- D10.5 promptly provide information and advice we may require to assist with any investigation. This applies equally to all centres offering online programmes where the malpractice takes place before the exam (see section 5.6).

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D11 You must submit and process any enquiries about results or appeals in accordance with the regulations set out in this handbook (see sections 6.3 and 7.2).

D12 You must keep unclaimed certificates under secure conditions for a minimum of 12 months from the date of issue and not destroy them (see section 6.4).

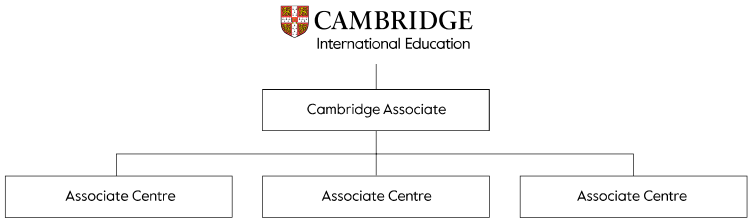
E A Cambridge Associate responsibilities

E1 A Cambridge Associate has a very important quality assurance role when it comes to working with their Associate Centres and you must make sure you carry out that role diligently.

E2 Cambridge Associates must carry out all the obligations of both centres and of Cambridge Associates which are specified in this Cambridge Handbook or in any supplementary documentation, including the Associate Agreement. The Cambridge Associate has full responsibility for the administration of all assessments in the centres associated with it.

E3 As a Cambridge Associate you may have agreed slightly different operating arrangements with us in your Associate Agreement to take account of local circumstances. Please remember these differences as you read through the Cambridge Handbook. No changes to the operating arrangements apply unless they are agreed by us in writing in accordance with the Associate Agreement.

E4 Unless otherwise specified in your Associate Agreement, we will send all information, data and materials to you to distribute to your Associate Centres. The same is true for information, data and materials that come back to us from your Associate Centres – they must go through you unless otherwise specified in your Associate Agreement.



E5 Cambridge Associates must apply to register their Associate Centres with us and must not establish, designate or treat any organisation as an Associate Centre without written approval from Cambridge. We can refuse such applications.

E6 As well as complying with all the duties of a centre (see sections A to D), Cambridge Associates will do the following and agree to do so on behalf of their Associate Centres unless otherwise agreed in the Associate Agreement:

E6.1 inspect their Associate Centres in accordance with the regulations stated in this Cambridge Handbook, and

E6.2 fill in Preparation – Form 5 and return it to our Customer Services team if the Cambridge Associate or one of their Associate Centres want to change qualification or syllabus eligibilities.

E7 We will inspect Cambridge Associates and their Associate Centres to make sure they comply with the regulations in this Cambridge Handbook.

E8 We must approve in advance, and in writing, any extra obligations a Cambridge Associate wants to impose on its Associate Centres.

E9 The Cambridge Associate is responsible for paying its fees and the fees of its Associate Centres as set out in the fees list and the Associate Agreement.

E10 The Cambridge Associate will give its Associate Centres reasonable notice of fees and of any changes to those fees.

E11 You cannot:

E11.1 have a new Associate Centre approved by us; or

E11.2 make any changes to an Associate Centre's details

between the final date for entries for an exam series for which the new Associate Centre intends to make entries, and the date of the final exam for the series.

E12 You must inform us in writing of any changes to the details of your Associate Centres which are held by us as soon as possible after the details have changed.

E13 We may reject an organisation's application to be an Associate Centre or not approve of any change to an Associate Centre's details where, at our sole discretion, we decide the organisation would not be suitable as an Associate Centre or that the proposed changes would make the Associate Centre unsuitable.

E14 If, in our sole opinion, an Associate Centre is failing to comply with any part of this Cambridge Handbook, is underperforming or inadequately

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providing exams or assessments, or where we believe that changes to an Associate Centre's details are likely to affect its ability to provide exams or assessments, then we may at our sole discretion and without notice:

E14.1 suspend the Associate Centre's status, with any reinstatement being subject to any conditions we may require; or

E14.2 terminate the Associate Centre's status; see section A14.

E15 The Cambridge Associate must make sure we have the right to enter the Associate Centre's premises to make any inspections we may require of a centre.

E16 The Cambridge Associate may not approach or invite any Cambridge International School to be an Associate Centre at any time.

E17 The Cambridge Associate is responsible for making sure their Associate Centres follow the guidelines for the use of the customer logo, available at www.cambridgeinternational.org/logos, and that they do not misuse or damage our intellectual property.

E18 The Cambridge Associate is responsible for all actions or inactions of their Associate Centres and for making sure they act in accordance with this Cambridge Handbook. **NEW** We are not responsible for Associate Centres and we will not usually contact Associate Centres directly about operational matters, even if we suspend an Associate Centre or it is in breach of their obligation. However, Cambridge reserves the right to contact Associate Centres where necessary. If Cambridge revokes approval of an Associate Centre, the Cambridge Associate must make all arrangements with that Associate Centre.

Administrative forms

Form available on Direct.

- Additional Qualification Types: Preparation – Form 5

F (A) Inspections and quality assurance of Associate Centres

F1 The Associate Agreement may require a Cambridge Associate to carry out an initial registration approval inspection of each of its Associate Centres. If so, you must comply.

F2 A Cambridge Associate is required to carry out re-inspections of its Associate Centres if any of them change premises or request to be approved to offer an additional qualification type or a science syllabus with a practical component. You must comply.

F3 A Cambridge Associate must regularly inspect its Associate Centres to make sure that each Associate Centre has the right facilities, equipment and teaching resources to deliver the curriculum and to prepare candidates for entry to Cambridge programmes and qualifications.

F4 Cambridge Associates must cover all the costs of inspecting their Associate Centres, whether by the Associate or by Cambridge.

F5 A Cambridge Associate must make their inspection reports available to us on demand and provide us with an inspection schedule at the beginning of each year.

F6 Where there is a conflict between inspection requirements as set out in the Cambridge Associate's contract with an Associate Centre and this Cambridge Handbook, the Cambridge Handbook must be followed. Cambridge Associates must tell us if they think there is a conflict and take all necessary steps to make the contract comply with this Cambridge Handbook. No conflict shall allow either the Cambridge Associate or the Associate Centre to breach any regulation in this Cambridge Handbook or reduce any of Cambridge's rights or remedies.

G (A) Associate Centres

G1 Associate Centres must keep to the terms and conditions for centres in this Cambridge Handbook where applicable. Where it says 'centres' or 'You' in this Cambridge Handbook this should be read to include Associate Centres.

G2 Associate Centres must also keep to any specific terms agreed with their Cambridge Associate in relation to the subject matter of this Cambridge Handbook. If there is a conflict they must keep to the terms of this Cambridge Handbook.

G3 Associate Centres must communicate with us through their Cambridge Associate, unless otherwise agreed with us.

H Communicating with us

H1 For general administrative queries we prefer you to use email (info@cambridgeinternational.org). You can also contact us by filling in the online feedback form at www.cambridgeinternational.org/help

H2 Where possible please supply and communicate with us using a specific email address that is connected to a particular role at your centre, for example, examsofficer@school.com rather than a generic one (info@school.com) or a web-based email (lsmith@gmail.com).

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H3 (A) Associate Centres must communicate with us via their Cambridge Associate rather than directly with us, unless otherwise agreed in the Associate Agreement or otherwise stated in writing by Cambridge.

H4 All correspondence between you and us must be in English. This applies even when assessments are offered in a language other than English.

H5 The Head of Centre, or exams officer, may sign letters from the centre to Cambridge. Legal notices must be signed by the Responsible Person.

H6 Unless instructed otherwise, you should send any written correspondence, but not exam materials, to:

Customer Support
Cambridge University Press & Assessment
Cambridge International Education
Shaftesbury Road
Cambridge
CB2 8EA
United Kingdom

If another address is specified on an administrative form or accompanying instructions, you should send the form to the address specified on the form or instructions.

H7 You must make sure:

H7.1 the centre is contactable during working hours (including during school holidays and school closures) via the communication lines (including email, telephone and post) you have provided to Cambridge

H7.2 that when you receive a communication or an email from Cambridge which requires a response, you respond within the specified time frame.

H8 You must include the following in all your messages with us:

H8.1 centre name and number

H8.2 name, position and title of the member of staff sending the message, and

H8.3 for continuing email correspondence, the reference number included in our initial response.

H9 Do not attach files larger than 20 MB to emails.

H10 Do not make any payments using a credit card by email because the security of credit card details cannot be guaranteed if you send them by email. We shall not be responsible for any loss you suffer if you send your financial details to us by an unsecured method.

H11 We send a monthly eNewsletter for exams officers to our centres and Cambridge Associates. This eNewsletter contains important new information, reminders about key dates and activities, guidance on changes to key processes and updates on new services. It is essential reading for all exams officers. If you do not receive this eNewsletter please contact our Customer Services team and we will add you to the distribution list.

I Telephone communication

I1 To telephone us, contact Customer Services on +44 1223 553554.

I2 If you telephone us about our regulations we will respond in writing. For complex issues, we may ask you to send us details in writing before responding. We do not accept responsibility for any misinterpretation of information, advice or guidance given by telephone.

J Software and online services

J1 By using any of our software or online services you agree to the terms of use for that software or service, as provided on our website.

J2 You must comply with the terms of use of Cambridge online services and software as well as any other Agreement with Cambridge.

J3 You must make sure that the usernames and passwords we issue are only given to staff authorised to access the relevant online services or software. You must not give login information to candidates (with the exception of login details for the Candidate Results Service) or to any other unauthorised person or person outside your centre, including any agent of Cambridge. If you do not comply we may suspend all services with you or withdraw your centre status and terminate our Agreement with you; see section A14.

J4 You must not use third-party websites, such as file-sharing websites, to send information or data to us.

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J5 Any purchases made through our online services will be charged in accordance with your contract with Cambridge as an additional service. If an Associate Centre makes any purchases through our online services, we shall assume the Associate Centre is acting on behalf of the Cambridge Associate and we will charge the Cambridge Associate in accordance with this section.

K Ownership of question papers

K1 All Cambridge exam question papers remain our property. You can use the paper after the exam, in accordance with either:

- K1.1 the 24-hour secure storage regulation (see section 5.3.2), or
- K1.2 regulations specific to the conduct of a particular component.

K2 We retain all intellectual property rights to the papers. For our conditions governing reproduction see section L.

L Copyright in exam material

L1 We assert our ownership in the copyright and all other intellectual property rights in the materials we deliver to you under your Agreement. This includes syllabuses, question papers, and other material relating to the programmes and qualifications, except where we have attributed work to a third party.

L2 You may distribute copies of past question papers and other materials, including electronically, as well as provide access to digital content and resources for which we hold copyright, for your internal educational purposes only, provided that copies and/or access is:

- L2.1 limited to one copy and/or single access per candidate entered for the syllabus
- L2.2 used exclusively by candidates at the centre in connection with their class work or internal assessments
- L2.3 not offered for sale or distribution under any circumstances
- L2.4 reproduced with all Cambridge copyright symbols, trade marks, acknowledgements and notices intact
- L2.5 not subject to approval from Cambridge
- L2.6 not passed to any other third party, and
- L2.7 not uploaded or allowed to be uploaded to any external website or platform.

L3 We cannot give permission to reproduce any third-party assets we do not own, even where such assets (e.g. musical scores, maps, excerpts, photographs) are incorporated within Cambridge materials. **NEW** It is your responsibility to make sure all texts and materials you use and provide to candidates are lawfully acquired and used in accordance with the relevant intellectual property laws.

L4 If staff at your centre want to use any Cambridge materials in any publications they are developing, they must ask for our permission to do so.

M Copyright and candidates' work

M1 The copyright in a candidate's work remains with the candidate, subject to clause M2.

M2 By submitting work to us a candidate grants a perpetual, irrevocable and royalty-free licence to us to use any answer scripts, coursework or extracts (providing the candidate remains anonymous and their personal data is not shared) for:

- M2.1 educational presentations, materials or products that we may publish
- M2.2 educational purposes, for example, standards setting, training or to demonstrate standards in the recognition of our qualifications by universities or other organisations, and
- M2.3 maintaining the integrity of assessments or to identify plagiarism.

M3 You warrant that you will:

(i) inform candidates of the copyright provisions set out in this handbook, and

(ii) ensure candidates' compliance with such provisions.

You will indemnify Cambridge against any loss, harm or damage incurred by Cambridge as a result of any breach of the above warranty.

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N Ownership of assessed material

N1 All material submitted for assessment will become our physical property.

N2 We do not return exam answer scripts to you, except for:

N2.1 UK copies of answer scripts as part of enquiries about results services.

N3 UK To request copies of answer scripts as part of enquiries about results services, see section 6.3.

N4 If you would like us to return Cambridge IGCSE, Cambridge O Level and Cambridge International AS & A Level work which you have submitted for moderation, you must complete Coursework and Moderation – Form 6 and return this to us when you submit your coursework. We may keep copies of some items for awarding and archive purposes.

N5 For other qualifications, we will not normally return to you assessments submitted for external marking or external moderation.

O Referring to Cambridge International Education

O1 You must refer to us as 'Cambridge' or 'Cambridge International Education'. You must not refer to us as the 'University of Cambridge', 'Cambridge University', 'UCIE' or 'CIE'.

Cambridge International Education ✓

Cambridge ✓

University of Cambridge International Examinations ✗

University of Cambridge ✗

Cambridge University ✗

CIE ✗

UCIE ✗

O2 When translating 'Cambridge International Education' into another language, the most appropriate wording is Cambridge International Education, a provider of international school examinations and curricula that is part of the University of Cambridge (England).

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Return of Moderated Coursework: Coursework and Moderation – Form 6

P Cambridge Identity

P1 The 'Cambridge Identity' refers to the Cambridge Marks (see P4) and associated text.

Centres, Cambridge Associates, Associate Centres and Professional Development centres are issued with official customer logos, descriptive text and customer logo guidelines when they register with us. We also send a plaque showing the relevant customer logo for display in or outside the centre.

P2 Cambridge grants you a non-exclusive, non-transferable, worldwide, royalty-free licence, without the right to sublicense, to use a Cambridge Identity during the period of your Agreement with us, on the terms set out in this Cambridge Handbook and the relevant customer logo guidelines. Your centre status dictates which Cambridge Identity you should use. You can download your customer Cambridge Identity, and find additional guidelines about how to use it, at www.cambridgeinternational.org/logos. The Cambridge Identity provided for use by centres is different from our standard organisation logo used on our exams officer materials. You must make sure you are using the correct Cambridge Identity for your centre and not our standard organisation logo.

P3 You may:

P3.1 reproduce your customer Cambridge Identity in full colour or in a single colour, subject to sections Q and R

P3.2 NEW use your customer Cambridge Identity on printed and digital marketing materials, including leaflets and brochures, advertisements, posters, webpages, videos and social media posts, subject to sections Q and R, and

P3.3 communicate your centre status in the text of information or publicity material.

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P4 We have a number of trade marks, known in this *Cambridge Handbook* as the **Cambridge Marks**. Cambridge Marks includes any trade mark (registered or unregistered), registered mark or design, or any other identifier that is identified with Cambridge, Cambridge University Press & Assessment or the University of Cambridge.

P5 During the term of your Agreement with us, you agree not to register or attempt to register any trade mark which includes the word 'Cambridge' or which is similar or identical to any trade mark owned by the University of Cambridge (for example, 'IGCSE'). Cambridge will make such determination at its sole discretion.

P6 During the term of your Agreement with us, you agree to promptly follow our requests and withdraw any pending trade mark applications which contain the word 'Cambridge' or which contain any element similar or identical to Cambridge Marks.

Q Regulations governing the use of the Cambridge Identity

Q1 If you do not follow the regulations in this Cambridge Handbook or misuse the Cambridge Identity or Cambridge Marks, your centre status may be withdrawn and the Agreement terminated; see section A14.

Q2 You must only use the Cambridge Identity appropriate to your status.

Q3 You must email logoapproval@cambridgeinternational.org with proof copies of all your planned uses of your Cambridge Identity and gain approval before use.

A If you are an Associate Centre you should email copies of your planned uses of your Cambridge Identity to your Cambridge Associate.

Q4 If you use the Cambridge Identity you must always:

- Q4.1 reproduce the Cambridge Identity in the format we have provided
- Q4.2 use the Cambridge Identity along with your own logo and name
- Q4.3 place the Cambridge Identity at the bottom of any document, and
- Q4.4 follow the guidelines for use of the customer logo available at www.cambridgeinternational.org/logos

Q5 You must:

- Q5.1 make sure that where the Cambridge Identity is used, it is no more than 75% of the size of the logo and name of your centre, and lower than the logo and name of your centre and any other associated logo
- Q5.2 make sure there is no confusion regarding your identity as an organisation independent of us
- Q5.3 not let other people use the Cambridge Identity or Cambridge Marks
- Q5.4 not use parts of the Cambridge Identity separately
- Q5.5 not use the Cambridge Identity or Cambridge Marks in certification or financial documentation that you issue, for example, attendance certificates, receipts or invoices, and
- Q5.6 not use the Cambridge Identity or Cambridge Marks as part of your email or web address, or social media handle, avatar and account name.

Q6 This Cambridge Handbook does not transfer any copyright in the Cambridge Identity and does not assign any rights in the Cambridge Marks from us to you or any Associate Centre.

Q7 The name 'Cambridge' is synonymous with high standards of quality and integrity in education. To make sure we are able to maintain the integrity of the Cambridge name, we pay particular attention to those centres that already have it within the title of their school. Any centre that uses the Cambridge name must make sure they use it appropriately in order that we may continue to agree to its use by that centre.

Q8 We reserve the right to take action against any use of the Cambridge name which we do not consider suitable, or use of the Cambridge Identity by an organisation that may bring it, Cambridge or any part of the University of Cambridge into disrepute.

Q9 We will not accept any new registrations from any school or Associate using 'Cambridge', 'Cambridge International' or the name of any of our programmes or qualifications, such as IGCSE, in its name and/or brand unless it is located in a city or town called Cambridge and is only serving students in that location. We reserve the right to assess each registration on a case-by-case basis.

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Q10 A registered school or Associate may not change its name to include the word 'Cambridge' or any of our trade marks. You must not use any part-form or derivative of 'Cambridge' in your centre name or centre description.

Q11 Permission to use the Cambridge Identity is dependent upon your continued status as an approved centre. If your centre status is withdrawn, use of the Cambridge Identity must stop immediately; see section A14.

Q12 For detailed instructions about how to use our logo, refer to the guidelines in the logos section of the Communications toolkit (www.cambridgeinternational.org/toolkit).

Q13 **NEW** We appreciate that schools going through the approval process will want to keep their community, including parents, informed of their progress and plans to offer Cambridge programmes and qualifications. Please be aware that, until your registration is complete and we confirm you are an approved school, you must not use any element of the Cambridge identity or say that you are already offering our programmes and qualifications and are registered with us.

R Approval for the use of the Cambridge Identity

R1 We are the sole interpreter of the conditions for use of the Cambridge Identity and Cambridge Marks. We will make all decisions about interpretation of the conditions of use.

R2 We investigate all reports of improper use of the Cambridge Identity, and will require that any use that does not comply with these guidelines ceases immediately.

S Access to assessments – equal opportunities

S1 We are committed to equality of opportunity for candidates with protected characteristics including, but not limited to, disability, gender, ethnic origin and religion.

S2 We aim to overcome inequality in relation to protected characteristics for all our qualifications in all areas of assessment activity. These activities include:

- S2.1 the assessment development process
- S2.2 the arrangements made for candidates who require reasonable adjustments (access arrangements or modified papers) in order to access our qualifications.

T Access and private candidates

T1 Specific regulations govern the access of private candidates to our assessments. See section 2.1.2 for details.

U Fees, invoices and payment

U1 We publish our fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge Early Years Centre or Cambridge International School – registered as online, we send the fees list to you. Fees for paid-for services are available through the relevant password-protected Cambridge website.

U2 We send all invoices and statements by email or post to the finance contact details you supply. Please let us know immediately if these contact details change.

U3 Please make your payments in the same currency as stated on the invoice.

U4 Payment terms are shown on your invoice as 'Payment Due Date'. You must adhere to them at all times.

U5 (A) The Cambridge Associate is responsible for paying their fees and those of their Associate Centres.

U6 Cambridge International Schools registered as online or approved to offer Cambridge programmes online must also pay a learner registration fee per student. We will invoice you for this fee based on the data you provide to us. If you do not provide this data by the date we specify, we will charge you an additional fee.

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Key Times and Full Centre Supervision

This section is about Key Times and Full Centre Supervision and why it is essential they are followed to maintain the integrity of our assessments.

What are Key Times?

Key Times are a defined point in a timetabled session when candidates must be in the exam or under Full Centre Supervision. Candidates must take their exams in the correct timetabled session. You can start the exam any time within the session, but you must follow our Key Time and Full Centre Supervision regulations. Key Times do not apply for windowed exams, for example, speaking tests, art & design exams and Cambridge Checkpoint tests.

Why are Key Times important?

Key Times are important because they prevent confidential exam information being shared with your candidates before their exam. Key Times also prevent your candidates from sharing confidential exam information with other candidates.

What are my Key Times?

Your Key Times are based on your centre's location. You must visit our website before each exam series (www.cambridgeinternational.org/keytimes) so that you know your Key Times.

Who is responsible for implementing Key Times?

The Head of Centre must make sure that all staff involved in the administration of our exams understand and can correctly implement Key Times and Full Centre Supervision. You must keep records of your exam timetable, including any periods of Full Centre Supervision. We may ask to see these at any time until we have issued certificates.

How do I use Key Times?

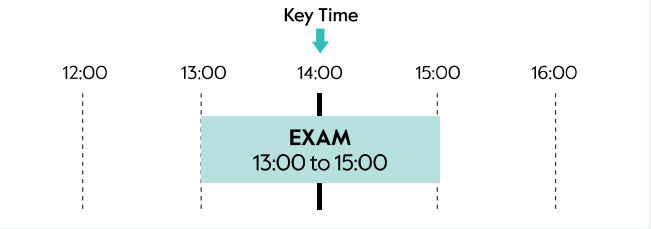
You can choose when your exams start within the timetabled session; however, you must make sure your candidates are in the exam or under Full Centre Supervision at the Key Time.

- We timetable all our exams in morning and afternoon sessions (and an evening session for administrative zones 4 and 5).
- You have a Key Time for each session.

Examples

These are examples only, and are not necessarily the same as the Key Times for your centre. We have used the same Key Time in each example to show the different ways you can structure your exams around your Key Times.

Example 1: The Key Time is in the middle of the exam. The exam starts at 13:00 and finishes at 15:00.



Candidates are in the exam at the Key Time, therefore they do not need to be under Full Centre Supervision before or after the exam. When the exam finishes, candidates can leave the exam room.

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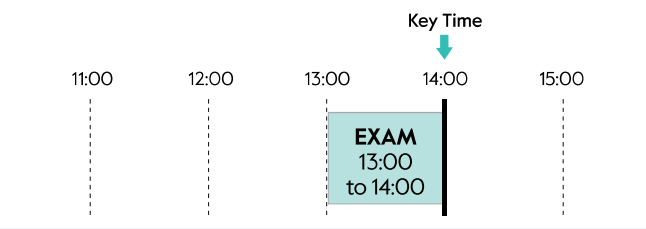
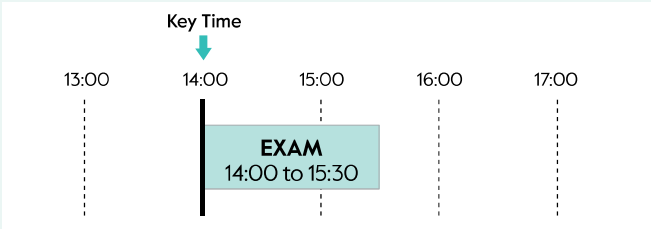
Example 2: The Key Time is at the end of the exam. The exam starts at 13:00 and finishes at 14:00.



Candidates must not leave the exam before the Key Time. If an exam ends at the Key Time, candidates can leave the exam room shortly after, as soon as the Key Time has passed. They do not need to be under Full Centre Supervision before or after the exam.

Example 3: The Key Time is at the start of the exam. The exam starts at 14:00 and finishes at 15:30.



Candidates are in the exam at the Key Time and do not need to be under Full Centre Supervision either before or after the exam. When the exam finishes, candidates can leave the exam room.

In any session, you can also choose to start your exam after the Key Time, or finish your exam before the Key Time. If you do this, you must make sure candidates are under Full Centre Supervision until the Key Time has passed.

What is Full Centre Supervision?

Full Centre Supervision is a defined type of supervision for candidates that is conducted by trained members of staff at your centre. If candidates are not in their exam at the Key Time, they must be in a room under Full Centre Supervision until the Key Time has passed, or until the exam starts.

You must supervise candidates in Full Centre Supervision. A supervisor can also be an exam invigilator, although Full Centre Supervision is different from exam invigilation. Supervisors must be suitably trained, and there must be at least one supervisor for every 30 candidates.

During Full Centre Supervision, candidates must not:

- be in the same room as any other people except candidates taking the same exam, and their supervisor(s)
- have access to telephones, mobile phones, laptops/computers, smart watches, or any electronic device with or without internet access
- have access to any other means of communication outside of the supervised group
- be allowed to communicate in any way with anyone who is not under Full Centre Supervision at the centre or outside the centre.

During Full Centre Supervision candidates can:

- have access to their printed books and notes. Candidates must not look at books and notes on an electronic device
- talk to each other
- leave the room accompanied by a supervisor. Where there is only one supervisor, you must make sure the supervisor can get help without leaving the candidates unattended. You must also make sure you have supervisors available to accompany any candidate, if required.

Other Full Centre Supervision regulations:

- Candidates under Full Centre Supervision who have already taken an exam that others in the group are due to take, for example an ICT practical test, must be kept separate from those candidates who have not yet taken the test. See section 5.7.4.
- If a candidate arrives late for a period of Full Centre Supervision, either before or after an exam, see section 5.1.10.

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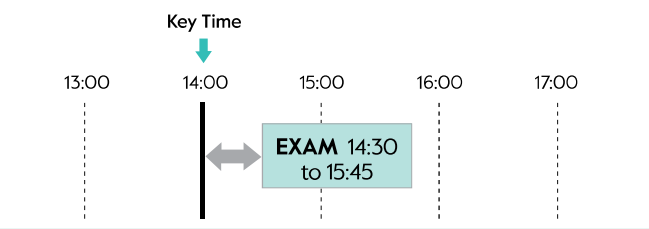
- Candidates who do not attend a period of Full Centre Supervision after an exam must be reported to us immediately as suspected malpractice. See section 5.6.
- You must keep signed records of all Full Centre Supervision arrangements for candidates. These records must show candidates who were supervised, the start and end times of supervision, and who conducted the supervision. We may ask to see these records at any time until certificates are issued.

You must arrange necessary periods of Full Centre Supervision. If you do not, we will consider this a breach of our regulations, and will treat it as possible centre staff malpractice. See section 5.6.

Examples

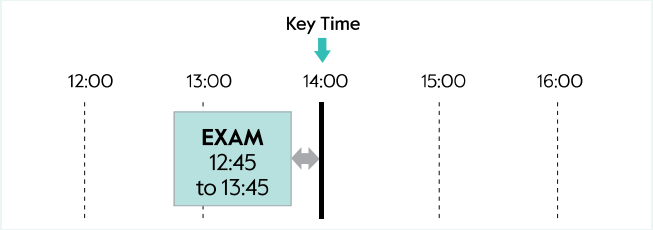
These are examples only, and are not necessarily the same as the Key Times for your centre.

Example 4: The Key Time is before the start of the exam. The exam starts at 14:30 and finishes at 15:45.



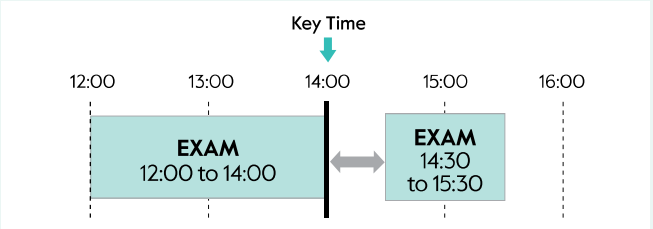
Candidates are not in the exam at the Key Time. They need to be under Full Centre Supervision from the Key Time until the exam begins. When the exam finishes, candidates can leave the exam room.

Example 5: The Key Time is after the end of the exam. The exam starts at 12:45 and finishes at 13:45.



Candidates must be under Full Centre Supervision from the end of the exam until the Key Time. Once the Key Time has passed, candidates can leave the exam room.

Example 6: The Key Time is at the end of one exam, but before the start of another exam timetabled for the same day. The first exam starts at 12:00 and finishes at 14:00, and the second exam starts at 14:30 and finishes at 15:30.



Candidates are in the exam at the Key Time. However, candidates taking the second exam must be under Full Centre Supervision from the Key Time until the start of their second exam.

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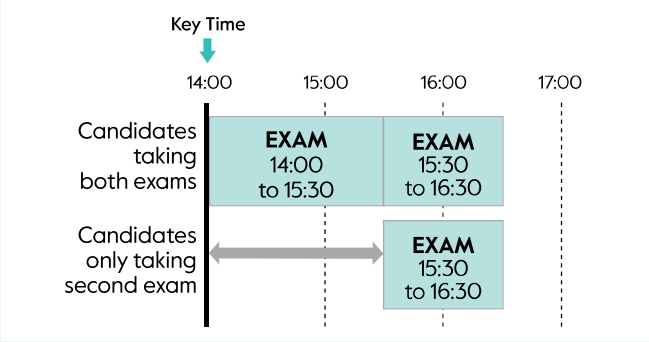
Example 7: The Key Time is at the start of an exam. There are two exams timetabled for the afternoon session, with no spare time in between.



Candidates taking the first exam are in the exam at the Key Time. When the exam finishes at 15:30, candidates can leave the exam room and Full Centre Supervision is not needed. There is no gap between the exams, therefore any candidates who are taking both exams do not need to be under Full Centre Supervision. Any candidates who are only taking the second exam must be under Full Centre Supervision from the Key Time until the start of the exam. When the second exam finishes, candidates can leave the exam room.

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Section 1: Preparation

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Cambridge Professional Development Qualifications

There are differences in this section for Cambridge Professional Development Qualifications (PDQs). Please see the PDQ Administrative Guide, available from www.cambridgeinternational.org/eoguide

1.1 Support from Cambridge

We provide a wide range of support for exams officers. This section tells you about the support we offer and how to access it.

Website: www.cambridgeinternational.org

Address: Customer Support, Cambridge International Education
Shaftesbury Road, Cambridge, CB2 8EA, UK

Email: info@cambridgeinternational.org

Telephone: +44 1223 553554

Webchat: www.cambridgeinternational.org/help

Please tell us your centre name and number when you contact us. (A) Associate Centres should contact their Cambridge Associate.

1.1.1 Our website

Visit our website for information about:

- administering our exams
- our programmes and qualifications
- syllabuses and specimen papers
- latest news and events
- professional development
- our blog.

Go to www.cambridgeinternational.org

1.1.2 Cambridge Exams Officers' Guide

This is our step-by-step guide to delivering Cambridge exams. Here you can access administrative documents and forms, Direct, a wide range of support materials and monthly calendars showing all your key dates and activities. Visit the guide at www.cambridgeinternational.org/eoguide

1.1.3 Cambridge Exams Officer eNewsletter

The newsletter delivers updates straight to your inbox at the beginning of every month. It includes:

- reminders about key dates and activities
- guidance on key processes
- updates on new services
- a look ahead to the next month.

If you work in a Cambridge International School or for a Cambridge Associate and you do not receive the newsletter, please contact us: info@cambridgeinternational.org

Read the latest newsletter at www.cambridgeinternational.org/eoguide

(A) We send the Cambridge Exams Officer eNewsletter to our Cambridge Associates in a Word document so that it can be adapted and the relevant information sent to their Associate Centres.

Important information

If you do not read the newsletter, or if you unsubscribe, you will miss important information about administering our exams. To subscribe or resubscribe to the Cambridge Exams Officer eNewsletter, please email info@cambridgeinternational.org

1.1.4 The 'Help' section of our website

The 'Help' section of our website contains answers to questions about our exams and services. Simply type your question into the search box or use the menu to guide you. The 'FAQs and Important Announcements' section highlights key information.

Our 'Help' section:

- saves you time
- contains more than 1200 answers
- is reviewed and updated daily.

Visit www.cambridgeinternational.org/help

1.1.5 Direct

Direct is a secure online tool for our exams officers. It allows you to:

- make and submit final entries
- submit internally assessed marks and forecast grades
- download files, such as provisional and final timetables and results files
- submit enquiries about results
- see our fees list in the 'My Messages' section.

The site is password protected. After we have registered your centre we email you login details. Keep these details secure. If you forget your password contact Customer Services (info@cambridgeinternational.org). If your exams officer changes complete the School Details Form, available from Direct.

After 20 minutes of inactivity you will be automatically logged out of Direct.

Cambridge Associates / Associate Centres

Cambridge Associates can contact Customer Services to ask for access to Direct for their Associate Centres. Once the account has been set up, we will email login details to the Cambridge Associate, who must pass them securely to their Associate Centre(s).

1.1.6 Digital File Despatch

Digital File Despatch is where we upload confidential materials as digital files instead of sending printed copies. It is for specific centres and exams only. We also upload non-confidential and pre-release materials for some syllabuses. If you need access we will send you instructions. See sections 2.2.3, 4.2.3 and 4.3.1.

1.1.7 Submit for Assessment and Secure Exchange

Submit for Assessment allows you to submit work online for some internally assessed and/or externally assessed components, instead of sending them to us on CD or USB, or using Secure Exchange. There is more information about Submit for Assessment on our website: www.cambridgeinternational.org/submit-for-assessment. You access Submit for Assessment via My Cambridge (see section 1.1.15).

1.1.8 NEW Global Listening

Global Listening allows you to access and download audio files for listening exams. You can find details of which syllabuses and components are available on Global Listening at: www.cambridgeinternational.org/global-listening

You access Global Listening via My Cambridge (see section 1.1.15).

1.1.9 NEW Apply for Access Arrangements

Apply for Access Arrangements allows you to apply for any access arrangements your candidates need. See section 1.3.1 for types of access arrangements. We are launching Apply for Access Arrangements in phases throughout 2025 to better support you. When it is available for you to use, we will contact you by email.

1.1.10 School Support Hub

The School Support Hub is a valuable resource for teachers. We send login details to your School Support coordinator when your centre registers with us. Visit the School Support Hub for:

- syllabuses – they give teachers all the information they need to deliver the subject and prepare candidates for the exam
- specimen papers showing examples of what question papers will look like and specimen mark schemes showing how marks would be assigned. We produce these for new or revised syllabuses and we only update them when the syllabus booklet changes a lot
- past question papers
- mark schemes and grade thresholds

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- schemes of work – suggested teaching programmes and teaching activities
- online discussion forums – a place for teachers to share ideas, resources, questions and answers
- Principal Examiner and Moderator Reports – Principal Examiners and Principal Moderators write these for some subjects at the end of each series. They give an overview of how candidates performed
- early question papers and pre-release material for some qualifications.

The member of staff at your centre with access to the School Support Hub is called the 'School Support coordinator'. They create logins for teachers and authorise training bookings. If the coordinator forgets their password they should contact Customer Services by emailing info@cambridgeinternational.org

Access the School Support Hub at www.cambridgeinternational.org/support

1.1.11 Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint

We will give you access to the relevant secure websites depending on what qualifications you offer. These websites contain a range of materials to help teachers plan and deliver the programmes, including:

- curriculum frameworks
- teacher guides
- schemes of work
- planning templates
- past question papers and mark schemes
- recommended published resources
- end of series reports.

For more information visit: https://primary.cambridgeinternational.org
https://lowersecondary.cambridgeinternational.org

Contact Customer Services if you do not have login details for these sites.

1.1.12 Communications toolkit

The Communications toolkit is the place to go if you are planning an open day or evening for parents/guardians, or if you want to announce your status as a Cambridge International School. You will find presentations, videos, posters, event banners, press releases and more.

Everything is free to access. If you want to download your customer logo you will be asked to log in using your centre number.

Access the Communications toolkit at www.cambridgeinternational.org/toolkit

1.1.13 Syllabus updates

Sign up for syllabus updates at www.cambridgeinternational.org/syllabusupdates We will then email you details of any new syllabuses, syllabus changes and those we are withdrawing.

1.1.14 Exams officer training

We offer free training to all our exams officers to make sure you are supported throughout the Cambridge Exams Cycle.

Our training includes regular 'How to' webinars which focus on making entries, running exams and preparing for results release for each exam series, including Cambridge Checkpoint. We also run regular focus webinars about a particular process and give you the latest information about administering exams. We send you all webinar dates and registration information each month in the Cambridge Exams Officer eNewsletter. You can sign up via our Professional Development Calendar at www.cambridgeinternational.org/eo-training

NEW In 2025, we are launching a self-study course for exams officers who have less than one year's experience in their role. The course focuses on all the key concepts, regulations and processes you have to follow as a Cambridge exams officer, and checks your understanding throughout. The course is modular with an interactive webinar to answer your questions at the end. For more details and to sign up to this course, see the Cambridge Exams Officer eNewsletter.

The self-study course, and our webinar recordings, are accessible through our Online Learning Area, and exams officers can easily set up their own account. Visit the Online Learning Area: www.cambridgeinternational.org/learningarea

All our training comes with a certificate of participation.

1.1.15 My Cambridge

My Cambridge is a 'single sign-on' service, which allows you to access services provided by Cambridge using one set of login details. You can access the services directly or via links on the My Cambridge 'landing page': https://sso.cambridge.org. There is more information on the My Cambridge page of our website: www.cambridgeinternational.org/my-cambridge

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1.2 UK Preparing your exams timetable

To keep our exams secure we have six administrative zones. Each zone has a specific timetable and you must use the correct version for your centre.

You can check which administrative zone your centre is in at www.cambridgeinternational.org/preparation

The timetable shows the date, session and length of each exam, including the range of dates for practical and oral exams. You must also follow our Key Time regulations when timetabling your exams.

For timetabled exams, all candidates must be in the exam or under Full Centre Supervision at the Key Time. See the 'Key Times and Full Centre Supervision' section and section 1.2.2 for more information.

As soon as the final timetable is available, work out how many exam rooms you need and book them. Decide how you are going to make sure your candidates know where and when their exams will take place. You should also create a timetable for your centre and display it where all your candidates can see it. We recommend you use our 'Create your centre's exam timetable' template to prepare for the exam series: www.cambridgeinternational.org/timetablingexams

1.2.1 Provisional and final timetables

When we create our timetables, we avoid setting exams that will cause major logistical problems and timetable clashes for centres and candidates. However, we cannot always produce timetables that suit all the countries we work with.

In May, we publish a provisional version of the timetable for the following June series. In October we publish a provisional version of the timetable for the following November series. Provisional timetables are available from the 'Support Materials' section of Direct.

When they are published, you have four weeks to let us know if you have any major concerns. Email any comments to info@cambridgeinternational.org with 'June/November series provisional timetable' and your centre number in the subject line. As the timetables take into account a wide range of interests and constraints, we only make changes if absolutely necessary.

Once we have considered any comments we publish the final version of the timetable to the 'Support Materials' section of Direct and our public website (www.cambridgeinternational.org/timetables). After the final timetable has been published exam dates would only change in exceptional circumstances.

Some subjects, e.g. art & design, do not have a timetabled date. Instead, teachers have a window in which to schedule the assessment.

Regulations

(a) You must use the final version of the timetable when you plan your exams and tell candidates the dates and times of their exams.

(b) To keep our question papers secure, sometimes we may need centres to take an exam component at a different time to the one on the final timetable. If this happens we will write to you to let you know the new timetable arrangements.

Important dates

Final timetable published:

- June series: end of October 2024
- November series: end of March 2025

1.2.2 UK Timetabling exams

(a) The timetable will show test date windows and which session timetabled exams must be taken in:

- Morning (AM)
- Afternoon (PM)
- Evening (EV) for a limited number of exams in administrative zones 4 and 5. See section D4 of the 'Responsibilities' section of this Cambridge Handbook.

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(b) Candidates must take timetabled exams in the exam window or session shown on the final timetable.

(c) Exams must follow our Key Time and Full Centre Supervision regulations. See the 'Key Times and Full Centre Supervision' section. Find your Key Times at www.cambridgeinternational.org/keytimes

Extra guidance

Watch our video to find out how to prepare your exams timetable using Key Times. It is available at www.cambridgeinternational.org/timetablingexams

1.2.2.1 Creating your exam timetable

When the final timetable is available, you need to create your own exam timetable for your centre, regardless of the number of exams your centre is taking. This timetable must be completed by a staff member who understands our Key Time regulations. When you have created your own timetable, it must be checked by a second experienced staff member to make sure all exam details are correct. You need to keep a copy of your timetable as it could be sampled as part of our quality assurance processes or required if we need to investigate a malpractice allegation.

Your exam timetable must include every exam you are entered for in the exam series, including any windowed exams. Your centre's timetable must also include the following information:

- syllabus
- component
- exam date
- exam session
- scheduled start and finish time
- exam duration
- any periods of Full Centre Supervision
- your centre's Key Times.

You must include your invigilator details and we also recommend you include the number of candidates.

For help timetabling your exams, there are guidance notes on page 3 of the timetable we publish. We also have a video that you may find useful, along with a 'Create your centre's exam timetable' template available on our website: www.cambridgeinternational.org/timetablingexams

There is also a timetable generator on Direct which can be used to generate a downloadable file containing useful information based on your entries. You can refer to this file when you create your own timetable. To find it, log into Direct, then go to the 'Timetables' link on the relevant series dashboard.

The downloadable file is not a replacement for your centre's exam timetable, and it is your responsibility to make sure that all necessary details are recorded in accordance with our guidelines on your final exams timetable.

1.2.3 UK Timetable deviations

(a) If you have a timetable clash you may apply for a timetable deviation using Preparation – Form 2. You may only carry out a timetable deviation if we have approved it in writing.

(b) We will reject your application if a timetable deviation could put the security of the assessment at risk. This means you must not move an exam:

(i) to an earlier date

(ii) so it finishes in an earlier session on the timetabled date, even if a period of Full Centre Supervision is planned to meet the exam's Key Time

(iii) more than 24 hours after the Key Time of the timetabled session.

(c) The following are examples where you may consider applying for a timetable deviation:

- A clash of exams in the same session where they would last a total of more than three hours and 45 minutes in a session, or more than six hours in a day. Candidates can sit exams for up to six hours in one day. The Head of Centre can allow candidates to sit exams that total more than this but you should consider the candidate's well-being.
- A single period of Full Centre Supervision that is more than four hours long.

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(d) The following are unacceptable reasons for a timetable deviation:

- national or public holidays
- taking part in national, local or centre events
- centre closure
- school holidays
- weddings
- work experience
- field trips.

1.2.3.1 Supervising timetable deviations

Candidates must be under Full Centre Supervision from the Key Time of the original timetable session until the new start time. See the 'Key Times and Full Centre Supervision' section.

1.2.3.1.1 Transporting candidates

(a) If you need to transport a candidate from one centre to another, this must be under Full Centre Supervision.

(b) You must report any known or suspected breaches of any agreed supervision arrangements using Exam Day – Form 9c.

(c) A responsible adult must supervise the candidate:

(i) The candidate must not access any information about the exam.

(ii) The responsible adult must fill in and sign Preparation – Form 7 beforehand. Keep this form until the end of the enquiries about results period. We may ask you to provide a copy.

1.2.3.1.2 Supervising candidates overnight

When no other options are available, we may approve the overnight supervision of candidates as part of your application. You must follow the regulations in section 1.2.3.1.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Candidate Supervision Declaration: Preparation – Form 7
- Suspected Candidate Malpractice Report: Exam Day – Form 9c

1.2.3.2 UK Applying for a timetable deviation

(a) To apply for a timetable deviation, send us Preparation – Form 2 by the deadline. We may not be able to accept late applications. A Associate Centres should send their forms to their Cambridge Associate.

(b) You must fill in a separate form for each exam.

1.2.3.3 UK Our decision

We will write to you with our decision about the timetable deviation. A If you are an Associate Centre we will write to your Cambridge Associate.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Timetable Deviation: Preparation – Form 2

Important dates

- Apply for timetable deviations at least four weeks before the exam.

1.2.4 Additional sittings for large numbers of candidates (see section 5.7)

(a) You can only run additional sittings if we have approved them in writing.

(b) There must be no contact between groups until all groups have finished the exam.

(c) You must prepare detailed plans of the additional sittings including:

- timings of additional sittings
- seating plans for each sitting
- how you will apply Full Centre Supervision to prevent groups of candidates from communicating with each other
- staff involved in invigilating the exams and periods of Full Centre Supervision
- how you will keep confidential material secure between sittings.

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Keep these records until the end of the enquiries about results period. For practical exams you must supply copies of the seating plan and attendance registers with the supervisor's report.

(d) To apply for additional sittings send Preparation – Form 8 to info@cambridgeinternational.org with 'Additional Sittings – Compliance' in the subject line.

(e) Apply for additional sittings at least four weeks before the exam.

(f) You must report any known or suspected breaches of agreed supervision arrangements using Exam Day – Form 9c.

1.2.4.1 Our decision

We will write to you with our decision about additional sittings. A If you are an Associate Centre we will write to your Cambridge Associate.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Additional Sittings: Preparation – Form 8
- Suspected Candidate Malpractice Report: Exam Day – Form 9c

1.2.5 Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint

(a) You must run Cambridge Primary Checkpoint and Lower Secondary Checkpoint tests within the window; see the 'Important dates' box opposite.

(b) Work out when your candidates will take the test and how many rooms you need.

(c) If you do not have enough space for all your candidates to take a test at the same time, you may arrange one or more additional sittings on the same day. If you want to do this send us Preparation – Form 8 as soon as possible and at least four weeks before the day of the affected test. Make sure you note the times of the additional sittings on the form and how your centre will supervise groups of candidates. You do not need to list all candidates affected when you send the form. However, you must make accurate attendance registers for each sitting and keep them until after we release the results.

(d) Several groups may take the tests in different sessions. Staff must supervise the candidates to keep the test secure. There must be no contact between groups taking exams in different sessions until all groups have finished the test. All conduct must follow our regulations for Full Centre Supervision.

(e) Create a timetable for your centre and display it so candidates can see it.

(f) You must return your scripts to us by the deadline given in our key dates. See section 5.4.2.

(g) We will publish results information on the date given in our key dates. See section 6.8.

Important dates

Chk **Cambridge Primary Checkpoint and Lower Secondary Checkpoint test periods:**

- May series: 7 to 25 April 2025
- October series: 6 to 17 October 2025

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Additional Sittings: Preparation – Form 8

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1.3 Access arrangements

Access arrangements are pre-exam arrangements that minimise access barriers for candidates with special educational needs, disabilities or temporary injuries/illnesses. Used appropriately, access arrangements can enable candidates with specific needs to demonstrate their knowledge, skills and understanding without changing the demands of the assessment.

There are two groups of arrangement:

Group 1: Access arrangements.
Group 2: Modified question papers.

1.3.1 Types of access arrangement

Access arrangements	Section	Modified question papers	Section
Colour naming and labelling	1.3.5.1	Braille paper	1.3.6.1
Computer reader	1.3.5.2	Coloured paper	1.3.6.2
Exemptions	1.3.5.3	A4 18 point bold	1.3.6.3
Extra time	1.3.5.4	A4 24 point bold	1.3.6.3
Human reader	1.3.5.5	A3 24 point bold	1.3.6.3
Practical assistant	1.3.5.6	A3 36 point bold	1.3.6.3
Prompter	1.3.5.7	A4 18 point bold enlarged to A3	1.3.6.3
Reading aloud (candidate)	1.3.5.8	A3 unmodified	1.3.6.4
Reading pens	1.3.5.9	Modified carrier language	1.3.6.5
Scribe	1.3.5.10	Tactile diagrams	1.3.6.6
Supervised rest breaks	1.3.5.11	Live speaker (Transcript of audio files)	1.3.6.7
Supplementary aids	1.3.5.12		
Transcript	1.3.5.13		
Voice-activated software	1.3.5.14		
Word processor	1.3.5.15		

1.3.2 Principles of access arrangements

(a) Access arrangements must not give the candidate an unfair advantage over others.

(b) We will not allow access arrangements if they affect the assessment objectives. Before applying for your access arrangements, refer to the assessment objectives in the relevant syllabus.

(c) We assess all candidates according to the same assessment objectives, so their grades and certificates have the same validity and are a true reflection of each candidate's attainment.

(d) If English is not the candidate's first language this is not a valid reason for an access arrangement.

(e) You are responsible for any costs for access arrangements except for modified question papers that we provide.

(f) A candidate may need an access arrangement in one type of assessment but not in another. You must decide whether the candidate needs to use the arrangements in all the assessments. They may not need the same access arrangements in every assessment.

(g) If the candidate's needs change after we have approved an access arrangement, you are responsible for making sure this does not affect the integrity of the exam. The candidate must not use an unnecessary arrangement.

(h) Any member of staff who helps candidates with access arrangements, for example, scribes or human readers, must follow our Key Time and Full Centre Supervision regulations.

(i) The following roles may be performed by the same person, if required. The syllabus must allow the use of all the relevant access arrangements. The person performing these roles should not usually be the candidate's own subject teacher and must not be a relative, friend or peer, and should not have an 'interest' in the candidate (see section 2.1.5).

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The Head of Centre appoints and manages the person(s) performing these roles. The person appointed must be a responsible adult who understands and follows our regulations. They must be fully capable of performing the role. The candidate must know and accept the person(s) performing these roles. The person performing these roles cannot also act as an invigilator:

- a colour naming assistant who sits with a single candidate (see section 1.3.5.1)
- human reader
- practical assistant
- scribe
- live speaker.

See section 1.3.5.7 for information about prompters.

(j) Contact us if you need advice about implementing any access arrangement.

(k) Our access arrangement regulations apply to both school candidates and private candidates.

You may need to complete an Access Arrangements Cover Sheet (Exam Day – Form 4) for some access arrangements. We will tell you which arrangements need this when we respond to your notification. You must make sure the cover sheet is attached to the candidate's answer script before despatching it.

Do not send the cover sheets by email.

1.3.3 Evidence of candidate's need

Access arrangements must be based on evidence of the candidate's barrier to assessment and evidence of the candidate's need for the requested arrangements. The evidence of need will vary depending on the disability and the access arrangements you are applying for. Evidence must meet the following criteria:

(a) Evidence of need should clearly outline how the disability, illness or learning difficulty presents a barrier to the assessment.

(b) Evidence must be dated within four years of the exam and verified by a suitable professional, for example, a medical professional, an educational psychologist, a clinical psychologist, an occupational psychologist or an appropriately qualified specialist teacher.

(c) The professional must sign and date the evidence and include details of their relevant qualifications. We may accept a report written by a teacher with no formal special needs qualifications, as long as they have evidence of at least five years' work experience in special educational needs.

(d) Supporting evidence must be in English. Any translated evidence must be signed by the author of the translation, a legal representative, or by the Head of Centre and one other member of staff.

(e) Where relevant, the supporting evidence must contain scores from psychometric assessments for the candidate.

- These tests should provide standardised scores for candidates showing them to be 'below average'. 'Below average' is represented by a standardised score of 84 or below on a test/tests taken within four years of the exam series. It does not mean 'below average standard' in a centre.
- We will accept below average standardised scores and we may accept below average scaled scores. We will not accept other types of scores from psychometric assessments, for example, age equivalent, percentile rank, composite scores, or raw scores.
- When you use the Detailed Assessment of Speed of Handwriting (DASH) to assess a candidate's writing speed please provide the Total Standard Score, which is calculated from the sum of the following four subtests: Copy Best, Copy Fast, Alphabet Writing and Free Writing. We may accept 'below average' standardised scores on individual subtests. Contact us if you have any questions.

(f) Where an exemption is needed you must hold evidence showing the candidate has covered the content of the whole syllabus, including the component from which they are exempt. This may include evidence of their classwork, coursework, mock exams or assignments. You should still have evidence of need that meets the criteria within this section. See section 1.3.5.3.

(g) Where a word processor is needed solely due to illegible handwriting, or a transcript of a candidate's illegible handwriting is needed, you should keep samples of the candidate's handwritten classwork as evidence.

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(h) We may ask to review your evidence as part of our quality assurance process. We may ask you to provide us with the evidence you have used to support your access arrangement applications and/or modified paper requests. The evidence must meet the criteria listed in this section, as well as the corresponding regulations for the relevant access arrangement. We may ask for this at any time, so you must keep the evidence on file until we issue certificates. Please provide electronic evidence only and make sure each file is clearly labelled with the relevant candidate number. See section C8 for information regarding data protection.

1.3.4 How to apply for access arrangements and modified papers

(a) You must decide whether access arrangements and/or modified papers are needed, and if so, which type each candidate needs. See section 1.3.1 for types of access arrangement. Other arrangements that are not listed may be available. If you think a candidate needs an arrangement that has not been listed, contact us at the start of the course to ask if we are able to approve this arrangement.

(b) For candidates with a permanent or long-term disability, illness, or learning difficulty, access arrangements should reflect their normal way of working and be based on any difficulties they have had when taking exams.

(c) Access arrangements must be based on evidence of the candidate's barrier to assessment and evidence of the candidate's need for the requested arrangements. See section 1.3.3.

(d) NEW You must tell us about any access arrangements your candidates need by submitting an application using either Preparation – Form 1 or our Apply for Access Arrangements service by the deadlines in this section. We will write to you about each application. So that we can support all our centres, we are launching Apply for Access Arrangements in phases throughout 2025. When it is available for you to use, we will contact you by email. Until you hear from us, continue to submit applications using Preparation – Form 1.

You must ask for modified question papers by sending us Preparation – Form 3 by the deadlines in this section. We will write to you about each application. A Cambridge Associates should agree earlier deadline dates with their Associate Centres so there is enough time to process the applications and send them to us.

(e) You must keep the evidence of your candidate's need until we issue certificates. We may ask you for this at any time, so you must have the correct evidence on file when we ask for it. We may ask to review your evidence as part of our quality assurance process. If you are unable to support your use of access arrangements or modified papers with appropriate evidence, it may be considered malpractice, or we may refuse the requested access arrangement.

(f) You must submit an application for each exam series. We cannot carry over approval from an earlier exam series.

(g) For emergency access arrangements for candidates with temporary illnesses, injuries or disabilities see section 1.3.10.

(h) The Head of Centre must make sure you follow the regulations for using access arrangements. If you do not do this, it may be considered malpractice.

	Form	May test series (Checkpoint) and June exam series application deadline	October test series (Checkpoint) and November exam series application deadline
Group 1: Access arrangements	NEW Access Arrangements: Preparation – Form 1 or Apply for Access Arrangements (see section 1.3.4(d))	21 February 2025	21 July 2025 for new entries 10 September 2025 for retake entries
Group 2: Modified question papers	Modified Papers: Preparation – Form 3	21 January 2025	1 July 2025

Administrative forms and services

Forms available from www.cambridgeinternational.org/forms

- NEW Access Arrangements: Preparation – Form 1 or Apply for Access Arrangements, available via My Cambridge
- Modified Papers: Preparation – Form 3

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1.3.5 Access arrangements

1.3.5.1 NEW Colour naming and labelling

Most visuals used in our assessment materials are presented in black and white; however, a very small number of task types may require candidates to perceive colour, for example, certain maps in geography, or certain science tasks. We offer two access arrangements to support candidates with colour vision deficiency (colour blindness).

- Colour naming: We allow candidates to ask for colours to be named. An invigilator or a designated colour naming assistant may do this. A colour naming assistant may sit with the candidate throughout the exam. The colour naming assistant or invigilator can only name the colour and must not provide the candidate with any other information. If a candidate needs to have a colour identified at a particular moment (for example, during a practical exam), they should use colour naming. A dedicated colour naming assistant cannot act as an invigilator.
- Colour labelling: We allow an appropriate member of staff to annotate the question paper with the names of any colours used. Colour labels should be in English. Labels can only state the colour and must not provide any other information. Where candidates respond in separate answer booklets or on paper, you must make sure you return the annotated question paper to us, along with the candidate's answer script. The member of staff should annotate the question paper with colour labels in a secure location, supervised by another member of staff. The question paper packet should be opened no more than 90 minutes before the start of the exam, and question papers must always remain supervised. You must follow our Key Times and Full Centre Supervision regulations.

You must attach an Access Arrangements Cover Sheet (Exam Day – Form 4) to each script. Use this to inform us when colour labelling has been used and give any other relevant information. The colour labeller must sign the sheet and the Head of Centre or exams officer must countersign it.

We also allow candidates with colour vision deficiency to use labelled colour charts alongside colour naming and/or colour labelling. We allow this in both written and practical exams.

Colour naming and colour labelling may need to be used at the same time in certain exams. For example, in a chemistry practical exam, a candidate may need to compare a solution to a coloured pH scale. The candidate may use a combination of a colour labelled pH scale and have an invigilator name the colour of their solution. The candidate can then independently compare the colours based upon the information provided.

1.3.5.2 Computer reader

We will allow a computer reader if the candidate is allowed to have a human reader. Depending on the assessment objectives of the syllabus, a computer reader may be allowed for papers testing reading. A computer reader can be used in language exams as it allows the candidate to independently meet the requirements of the reading standards. The software must not decode or interpret the paper in any way. You must make sure the PDF question paper we provide is compatible with the software you will be using. Download a non-interactive PDF past question paper from www.cambridgeinternational.org to test it with your software. There must be enough time and training to make sure the candidate knows how the software works. When you ask for a computer reader you must tell us which syllabus and components the candidate is taking so we can upload the correct PDF. NEW You will be asked to provide this information when completing your application. Where a candidate is working with a computer reader for the entire duration of an exam, they are permitted to use 25% extra time. You must apply for this.

1.3.5.3 Exemptions

An exemption is where we agree a candidate can miss a component, or components, within a syllabus:

(a) We will only consider exemption in the very rare circumstance that no other access arrangement is suitable.

(b) The candidate must still cover the content of the whole syllabus, even if they are exempt from a component.

(c) We will not allow exemptions if they affect the integrity of the qualification.

(d) We will not allow exemptions from components which are the key objectives of the syllabus.

(e) If we approve an exemption you must mark the candidate as absent on the attendance register for the exam. We will only award a mark if the candidate completes at least 50% of the total assessment for each qualification, by component weighting, in the exam series for the award. Carry-forward marks do not count towards this.

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1.3.5.4 Extra time

(a) There are two different types of extra time:
- extra time up to 25% (this should meet the needs of most candidates)
- extra time over 25% (we only allow this for candidates who have very significant and persistent difficulties and where there is a strong justification).

(b) The amount of extra time being requested must be suitable for the candidate's needs and be in line with their normal way of working.

(c) If you are applying for extra time over 25% you must hold evidence that gives a strong justification. We only allow this for candidates who have very significant and persistent difficulties. This may include a candidate who:
- is affected by multiple disabilities
- has a very severe disability or illness
- is visually impaired and needs to use Braille papers
- cannot use another type of access arrangement because of specific syllabus restrictions
- requires a significant amount of extra time to dictate the words letter by letter, as well as all punctuation, to a scribe in language writing tests. See section 1.3.5.10 (f).

(d) Extra time is not appropriate for candidates who only require a break during the exam. You should apply for supervised rest breaks. You can apply for both extra time and supervised rest breaks as long as the reasons for applying for both arrangements are different (for example, extra time for processing difficulties and a supervised rest break for a medical need). We recommend you allow candidates to take supervised rest breaks if they have extra time over 25%.

(e) Candidates who need extra time because of below average reading and writing speed will typically have results measured in tests of speed. See section 1.3.3(e) for information.

(f) It is important to remember that if the exam is too long, it could affect the candidate's condition and/or mental wellbeing. You may need to ask for medical advice to make sure the access arrangement is suitable.

(g) For listening exams, apply extra time to the pauses already built into the recording. You will need to manually pause the recording. Contact us to ask for our guidance document.

For candidates using a Braille paper or answering in Braille, extra time may be applied as a percentage of the whole listening exam. We recommend extra time is applied during the pauses of the exam so as not to interrupt the flow of the exam. The candidate should be invigilated separately.

(h) For speaking tests, there are two options for extra time:
- For candidates with speaking difficulties, you should give them enough time to answer. You do not need to apply for this arrangement before the exam.
- For candidates with processing difficulties, you may apply for a percentage of extra time (for example, 25%). You must apply for this arrangement in the normal way.

You must complete an Access Arrangements Cover Sheet (Exam Day – Form 4) and keep it with the recording. You should record how much extra time the candidate was given on the cover sheet. You must also keep the evidence of need on file. If a candidate with extra time is included in your centre sample, send us the completed cover sheet along with the work.

(i) **NEW** Where a candidate is working with a computer reader, human reader, scribe or practical assistant for the entire duration of the exam, they are permitted to use 25% extra time. You must apply for this.

1.3.5.5 Human reader

A human reader reads the questions to the candidate. This may involve reading the whole question paper or only the words that the candidate asks them to read.

(a) We usually allow human readers:
- for visually impaired candidates who cannot read a Braille/enlarged paper independently or quickly enough even with extra time
- where the candidate's reading skills (accuracy, speed, comprehension) have been measured as below average through a psychometric assessment. See section 1.3.3(e) for more information.

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(b) Human readers are not allowed for language papers or syllabuses that test reading. Instead, you may apply for extra time up to 25%, or to use a computer reader, or reading pen. See sections 1.3.5.2, 1.3.5.4 and 1.3.5.9.

(c) The human reader may read numbers printed in figures as words. For example, they should read 252 as 'two hundred and fifty-two' but at the point of reading the number they should also point to it on the paper. An exception would be when the question is asking for a number to be written in words (for example, 'write the number 3675 in words').

(d) If the candidate asks them to, the human reader may repeat a question or read back what the candidate has written in the answer. They must not point out any errors.

(e) If the candidate asks them to, the human reader may spell a word on the question paper. Apart from this they must not give spellings.

(f) The human reader may help a visually impaired candidate to identify diagrams, graphs and tables. They must not give factual information or offer any suggestions, other than to give information that would be available to candidates who can see.

(g) The human reader must only read the instructions and questions on the question paper(s) and must not explain or clarify the meaning of the words. In some cases, understanding the written word may be the skill that is examined.

(h) The human reader must not tell the candidate which questions to answer, when to move on to the next question, or the order to answer them in.

(i) The human reader must not decode symbols and unit abbreviations. For example, they should not read 2^2 as 'two squared' but simply point to the function. Part of the assessment is recognising what the superscript '2' means. Similarly, if the symbol > is printed, they should not read it as 'greater than' but simply point to it.

(j) You must make sure other candidates cannot overhear or be disturbed by the human reader. If you put the candidate and reader in a separate exam room, they will need a separate invigilator. See section 1.3.9.

(k) A reader may be a dedicated member of staff who sits next to the candidate. If you have multiple candidates who require a reader, but they only need a small number of words or sentences to be read, a reader may perform this role for up to four candidates. The candidates should be seated near to each other, however the reader must not read to more than one candidate at the same time. If you choose to allow a reader to read to more than one candidate during an exam, the Head of Centre is responsible for making sure it is appropriate to the candidates' needs. The candidates would need to signal to the reader when they require a word or sentence to be read, for example, by raising their hand.

(l) Human readers for the visually impaired:
- must also tell the candidate how much time has passed and how much time is left if they ask
- are allowed to help a candidate retrieve information found in tactile maps, diagrams, graphs and tables so that they have access to the same visual information found in a standard print or modified print question paper
- must immediately tell the invigilator about any communication problems.

(m) A sign language interpreter can help the candidate to understand the rubric only. When signing the rubric, the interpreter must sign exactly what is written without changing the meaning, adding any information, or explaining what the rubric is asking the candidate to do. Where a sign is a symbol that gives the meaning of a technical or subject-specific word that is being tested, the interpreter should point to it on the question paper, or spell it using their fingers. The interpreter must know the sign language the candidate uses, and the candidate must have used the signs throughout their studies. The Head of Centre is responsible for appointing a suitable sign language interpreter.

(n) You may consider applying for modified carrier language papers and a reader for any candidate who meets the criteria for a reader, and who is usually supported through sign language.

(o) We do not allow oral language modifiers for any exams.

(p) **NEW** Where a candidate is working with a human reader for the entire duration of an exam, they are permitted to use 25% extra time. You must apply for this.

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1.3.5.6 Practical assistant

(a) A practical assistant is a responsible adult who, in coursework and/or in an exam, carries out practical tasks the candidate asks them to do. They:

- allow the candidate to show their knowledge, understanding and skills
- make sure candidates are safe
- carry out accurately some or all of the manual practical tasks the candidate asks them to, unless it is dangerous
- say what they can see if the candidate asks them
- must immediately tell the invigilator or exams officer about any communication problems
- may ask the candidate to repeat instructions if they are not clear
- must not comment on any of the candidate's answers, help with the answers to questions or help to analyse data
- must not tell the candidate when a task is finished
- must not advise the candidate about which practical questions to answer, when to move on to the next question, or the order they should answer questions in
- must not advantage or disadvantage the candidate
- must follow these regulations as if they do not the candidate could be disqualified.

(b) Candidates may be allowed to use a practical assistant if they have disabilities, illnesses or injuries that prevent them from carrying out parts of the assessment themselves.

(c) At the beginning of the course, you must ask us if we will allow a practical assistant.

(d) A practical assistant should reflect the candidate's usual way of working, unless there is a temporary disability caused by injury.

(e) We will not allow a practical assistant in subjects testing design or artistic skills (for example, music, art or design & technology), where the practical skill is the focus of the assessment. If the candidate only needs minimal help, contact us about their needs.

(f) Make sure that other candidates are not disturbed. If you put the candidate and practical assistant in a separate exam room, they will need a separate invigilator. See section 1.3.9.

(g) **NEW** Where a candidate is working with a practical assistant for the entire duration of an exam, they are permitted to use 25% extra time. You must apply for this.

1.3.5.7 Prompter

(a) A prompter helps to keep a candidate focused on the task, and on the need to answer a question and then move on to the next. You may allow a prompter for candidates who have:

- significant attention difficulties
- a neurological or cognitive disability affecting attention
- little or no sense of time
- an obsessive-compulsive disorder which causes them to keep revising a question rather than moving on to other questions.

(b) The prompter needs to be familiar enough with the candidate to recognise when their attention is no longer on the task in hand.

(c) A prompter may be a dedicated member of staff who sits with one candidate who requires a lot of prompting. In this instance, they should not also act as an invigilator. If you have a candidate, or a small number of candidates who are seated near to each other, who only require infrequent prompting, then the prompter may also act as an invigilator. This task must not distract the prompter/invigilator from other responsibilities in the exam room and should not distract other candidates. You must be confident that the invigilator is able to appropriately prompt the candidate(s) in a timely manner, otherwise they should not act as an invigilator as well.

(d) A prompter must not speak to the candidate, give factual help or offer suggestions. They may be able to say the candidate's name or use instructions on prompt cards. Instructions must not help candidates with exam questions. Send any prompt cards you are planning to use to info@cambridgeinternational.org before the exam so we can make sure they are acceptable.

(e) **NEW** If a candidate who is visually impaired needs a prompter, we may allow them to give verbal prompts. Verbal prompts must not help candidates with exam questions, give factual help or offer suggestions. Verbal prompts must be agreed with Cambridge. Send any verbal prompts you are planning to use to info@cambridgeinternational.org before the exam so we can make sure they are acceptable.

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(f) A prompter must not advise the candidate about which questions to answer, when to move on to the next question (unless they have finished the previous answer and their attention has wandered), or the order to answer questions in.

(g) A prompter can attract the candidate's attention by tapping on the desk or on the candidate's arm, depending on what they usually do, to remind the candidate that they must pay attention to the question.

(h) A prompter may not be busy during the whole exam, but they must be vigilant and tell the invigilator about any problems.

1.3.5.8 Reading aloud (candidate)

If needed, a candidate can take their exam in a separate room so they can read aloud, if this is their normal way of working. You are responsible for making sure that the candidate takes the exam in a suitable room where they cannot be overheard by other candidates. In these cases, you must provide a separate invigilator. See section 1.3.9.

Reading aloud by the candidate may be permitted in instances where a candidate is not allowed a reader, for example, where the candidate's reading skills (accuracy, speed, comprehension) have been measured through a psychometric assessment and are not below average.

1.3.5.9 Reading pens

We will allow a reading pen in papers testing reading. They must not have an in-built dictionary or thesaurus, or data-storage facility. All pens must be checked before the exam.

1.3.5.10 Scribe

A scribe writes down or word processes a candidate's dictated answers.

(a) A scribe can be used in coursework and/or in exams, but not in speaking tests. If an exam involves word processing, we will not allow a scribe.

(b) We will allow a scribe in certain subjects for candidates who cannot produce written responses in any other way, for example, word processing or Braille input. For exam purposes, this means:
- candidates whose writing speed or spelling accuracy have been measured through a psychometric assessment. Please see section 1.3.3(e) for more information
- candidates whose free writing cannot be read or understood by others, or is produced so slowly that answers cannot be fully recorded even with the extra time allowed
- candidates with a permanent physical disability or recent injury who cannot write.

(c) Candidates must respond in English unless the syllabus says otherwise.

(d) We recommend that a candidate using a scribe takes the exam in a separate room. However, if the candidate and scribe are in the same room as other candidates, you must make sure other candidates cannot overhear and are not disturbed. If the candidate and scribe are in a separate exam room, they will need a separate invigilator. See section 1.3.9.

(e) A scribe:
- must write down or word process accurately what the candidate says
- may read back what has been written if the candidate asks them to. They must not comment on any part of the answer
- must draw or add to maps, diagrams and graphs exactly as the candidate asks them to. If the candidate is taking a design paper, we will only allow a scribe to help with written parts of the paper
- must write or word process a correction on a typescript or Braille sheet only if the candidate asks them to
- must immediately tell the invigilator about any communication problems
- must not give factual help to the candidate or show when the answer is finished
- must not advise the candidate about which questions to answer, when to move on to the next question, or about the order to answer questions in. If the scribe is also acting as a prompter, they should refer to section 1.3.5.7
- must follow these regulations as if they do not the candidate could be disqualified.

(f) In exams testing spelling, punctuation, grammar and language, where candidates receive marks for the quality of their language, we allow the choice of two options:
- Opt-out: The candidate does not dictate all words letter by letter, but must dictate punctuation to the scribe. We will assess the candidate's language skills based on the quality of language used in their dictated

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answers, for example, grammar, syntax and word choice. The total marks available for the paper do not change; however, marks corresponding to spelling cannot be awarded because the candidate would not demonstrate the spelling skills being tested when they are using this access arrangement.

The number of spelling marks varies for each component, but in all cases, this is a small proportion of the overall mark for a syllabus. Please contact us if you would like the marks allocation for a specific syllabus and component.

This arrangement is the default process and will be applied to all language syllabuses your candidate is entered and uses a scribe for, unless you take the option to 'opt-in', as outlined below.

For this arrangement, you need to complete an Access Arrangements Cover Sheet (Exam Day – Form 4) and attach it to the candidate's script. Use this to confirm that the candidate did not dictate spelling. See section 1.3.5.10 (g) and (h).

- Opt-in: The candidate dictates all words letter by letter, as well as all punctuation, to the scribe. This means marks corresponding to spelling will be awarded.
- Your candidate would be permitted to use up to 100% extra time to allow them to dictate spelling and punctuation in language syllabuses only. You would not need to tell us about the use of this additional time; however, you must still apply for any extra time required for other reasons. If a candidate dictates answers onto a recording device, you must produce a transcript.

  For this arrangement, you need to complete an Access Arrangements Cover Sheet (Exam Day – Form 4) and attach it to the candidate's script. Use this to confirm that the candidate dictated spelling.
- For all non-language syllabuses, candidates are not required to dictate spelling and punctuation to a scribe. If you are unsure if a syllabus is a language syllabus, please contact us.
- A candidate must decide to 'opt-in' or 'opt-out' before each language exam. They must not change option during the exam. If a candidate 'opts-out' for any part of the exam, then the full proportion of marks will be forfeited. Marks cannot be proportionally forfeited.

(g) If opting out, candidates should clarify their word choice where the word is a homophone. This is important where this information is key to the grammatical accuracy of a response. For example, where the homophone is a verb, candidates should specify a tense, verb ending or indicate where a diacritic (such as an accent, umlaut or vowel mark) should be placed. **NEW** The scribe may ask the candidate for clarification using an open question, for example, 'Which "there" do you mean?'; however, they may not provide any information to aid the candidate's selection.

Below are examples of where a candidate may need to provide clarification:

- In French language, the following verbs are pronounced similarly: 'jouer' (to play, the infinitive form), 'joué' (played, past participle), 'jouais' (used to play – imperfect, 1st or 2nd person singular), 'jouait' (used to play – 3rd person singular). As they function differently in a sentence, they would require clarification from the candidate.
- In Spanish language, the words 'a' and 'ha' are pronounced identically but have different grammatical functions in a sentence. The word 'a' means 'to' (preposition), whereas the word 'ha' means 'has' (verb in auxiliary form). The following past tense verb forms have very similar pronunciations but have different meanings: 'calló' (he was quiet) vs 'cayó' (he fell).
- In English language, three commonly confused homophones are 'there', 'their' and 'they're'. Although they are pronounced identically, they have different grammatical functions and may need clarification from the candidate. The word 'there' is an adverb of place, the word 'their' is a possessive pronoun and the word 'they're' is a contraction of the words 'they' and 'are'.

(h) If opting out, candidates should pay particular attention to their pronunciation when working with a scribe. This is because when a mispronunciation changes the meaning, their marks may be affected. This reflects the accuracy requirements stated in some mark schemes; for example, the Cambridge IGCSE foreign language mark scheme states: 'Reject misspelt words which suggest a word with a quite different meaning.' Below are some examples of where a candidate would need to pay particular attention to their pronunciation and may need to provide clarification:

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- In French language, candidates often mix up the pronunciation of 'vie' (life) with 'ville' (town). In the mark scheme, they would not get credit if they misspelt it in this way and so they would not get credit if the wrong words were scribed.
- In Spanish language, candidates often mix up the pronunciation 'haber' (to have – auxiliary) with 'a ver' (let's see), and also mix up 'vez' (time) with 'ves' (you see). In the mark scheme, they would not receive marks if they misspelt these words in this way and so they would not get marks if the wrong words were scribed.
- In English language, some words sound similar but have entirely different meanings. For example, 'assure', 'ensure' and 'insure'. The candidate should be clear which word was appropriate within the sentence, as no marks would be given if the correct word was misspelt.

(i) Candidates must not answer written questions using sign language in any syllabus, including using sign language to 'dictate' answers to a scribe.

(j) You must attach an Access Arrangements Cover Sheet (Exam Day – Form 4) to each script. Use this to explain whether the candidate or scribe produced graphs and diagrams and give any other relevant information. The scribe must sign the sheet and the Head of Centre or exams officer must countersign it.

(k) NEW Where a candidate is working with a scribe for the entire duration of an exam, they are permitted to use 25% extra time. You must apply for this.

1.3.5.11 Supervised rest breaks

(a) You may allow supervised rest breaks in most timed exams.

(b) You must always consider supervised rest breaks before you apply for extra time.

(c) You may give supervised rest breaks either in or outside the exam room. If the supervised rest break is in the exam room, you must make sure the candidate does not have access to the question paper and answer booklet.

(d) You must not include the length of the break in the time allowed for the exam component, including any extra time allowance. You should stop the clock when the candidate starts their rest break and start it again when the rest break is over.

(e) If appropriate, you can apply for both extra time and supervised rest breaks if the reasons for applying for both arrangements are different (for example, extra time for processing difficulties and a supervised rest break for a medical need).

(f) Other candidates must not be distracted by the candidate's supervised rest breaks.

(g) Contact us if you need advice about scheduling rest breaks.

1.3.5.12 Supplementary aids

A candidate may need supplementary equipment when taking the exam. For example:

- Visual aids: if a candidate has a visual impairment you may allow them to use visual aids, for example, a magnifying glass, tinted glasses, coloured overlays, tactile rulers or reading rulers.
- Headphones: if a candidate has a hearing impairment, sensory difficulties or tinnitus you may allow them to use noise-cancelling headphones or ear defenders. You must make sure any headphones comply with our regulations in section 5.1.8.2.
- Sit/stand desks or writing slopes.
- You must tell us if a candidate needs medical monitoring devices in the exam room, for example, a glucose monitor.

1.3.5.13 UK Transcript

(a) NEW If a candidate has illegible handwriting, it may help an examiner to have a transcript of the candidate's work to refer to. You must tell us if you will be submitting transcripts of a candidate's illegible work.

It is also a requirement for centres to supply transcripts of Braille scripts. See also section 1.3.6.1.

For information about transcripts of an audio file that we provide when a candidate is supported by a live speaker, see section 1.3.6.7 (Live speaker) if you need this. The regulations below (b to g) do not apply to this access arrangement.

(b) A member of your centre's staff who is familiar with the candidate's handwriting or is fully competent in Braille code for the subject must produce the transcript. This must not be the candidate's subject teacher. Contact us if this is not possible.

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(c) You must produce the transcript immediately after the exam under secure conditions. The candidate must not be involved in producing the transcript.

(d) The transcript may be handwritten or word processed.

(e) A transcript may be a full copy written in a spare answer booklet, for example, if a candidate answers in Braille. Or it may be a partial copy if only certain words need to be clarified. In this case, you must photocopy the original script and write the words clearly above the candidate's writing in blue or black (but not in red, green or purple ink, or pencil).

(f) You must attach an Access Arrangements Cover Sheet (Exam Day – Form 4) to the candidate's script. The teacher preparing the transcript must sign the cover sheet and the Head of Centre, or person acting on their behalf, must countersign it. You must also attach a copy of an Access Arrangements Cover Sheet to any coursework/portfolio transcript or scan in and then upload the Access Arrangements Cover Sheet as part of any online submission of work, if applicable.

(g) The transcript must be an exact word-for-word copy of the candidate's script.
- The transcriber must not add or remove any words and must not change their order. The transcriber must not correct spellings, punctuation, grammar and technical terms.
- If you think that some interpretation might be needed, contact us as soon as possible before the exam. You should be prepared to send us samples of the candidate's usual written work.
- Producing the transcript must not delay you sending us scripts. You must not send any extra information with the scripts.
- If a candidate's difficulties are so major that you cannot produce a transcript, see the regulations for using a scribe (section 1.3.5.10) or word processor (section 1.3.5.15).

1.3.5.14 Voice-activated software

Voice-activated software allows a candidate to dictate their answers using speech recognition technology. Voice-activated software includes:

- speech recognition technology with predictive text when the candidate dictates into a word processor. The software may be used to read back and correct the candidate's dictated answers
- assistive technology combined with computer software that produces speech and is used to dictate to a scribe, for example sip-and-puff combined with computer software.

Voice-activated software is not permitted in any language exam. We will allow voice-activated software in certain subjects:

- when the candidate cannot produce written responses in any other way, for example, handwriting or word processing
- for a candidate whose free writing is produced at a speed where answers cannot be fully recorded even with extra time.

Where voice-activated software is being used, attach an Access Arrangements Cover Sheet (Exam Day – Form 4) to each candidate's script.

1.3.5.15 Word processor

A word processor is a typewriter, electronic typewriter or word-processing software on a computer or tablet.

(a) Candidates who may need a word processor are those with:
- a learning difficulty that affects their ability to write
- a physical disability
- a health condition
- visual impairment
- a cognitive disability
- illegible handwriting
- **NEW** approval for a scribe.

(b) A word processor cannot be used by a candidate just because:
- they want to type rather than write in exams
- they work faster on a keyboard
- they use a word processor at home.

(c) A word processor with spellcheck may be used, except for syllabuses testing spelling, punctuation and grammar, or quality of written work. In these syllabuses, you must make sure spellcheck is turned off.

(d) Candidates can usually produce coursework using a word processor if the syllabus allows this. When you mark internally assessed coursework, you must give credit in line with the assessment criteria in the syllabus. You cannot give the candidate credit if they cannot show certain skills because they have used a word processor. We may ask you to send us coursework produced on a computer so that a moderator can inspect it.

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(e) We award marks based on the achievement the candidate has shown. To make sure mark schemes are applied fairly, we may ask you to supply extra information about how the candidate wrote their answers.

(f) Before you choose a syllabus for a candidate who uses a word processor, you must consider whether the candidate can fully meet the assessment objectives. Some syllabuses test skills (for example, drawing by hand) that the candidate cannot show if they use a word processor. Contact us as early as possible if you are not sure.

(g) A word processor must be used as a typewriter, not as a database, although standard formatting software is acceptable. Word processors must not have grammar check, predictive typing, phonetic conversion from English, or thesaurus features enabled in any assessment unless we have approved this. They must not give the candidate access to other applications such as calculators or spreadsheets.

(h) They must not include graphics packages or computer-aided design software unless we have allowed this.

(i) A candidate may use a combination of both word processing and handwriting during the exam.

(j) In language syllabuses, keyboard shortcut software is allowed. A keyboard containing specific language keys is acceptable.

(k) If you want to use a specific piece of software for a candidate, you must ask for our permission first. We will decide whether we will be able to assess the candidate fairly in each subject. We may ask for independent advice about computers and software to decide which are suitable.

(l) The word processor must not be connected to the centre's network, the internet, or any other means of communication.

(m) You must be sure that any word processor used in an exam is clear of any stored data.

(n) The word processor must be in good working order and must be connected to mains electricity, not run on a battery. It must also be connected to a printer so a script can be printed. Printing may be done after the exam, but the candidate must make sure the work printed is their own. The candidate should save their work regularly, using autosave if this is available. If the work has been saved onto a USB stick for printing, check that you can retrieve the work before you delete it.

(o) If a candidate uses a word processor you must make sure the other candidates are not disturbed and cannot read the screen. If the candidate using the word processor is in a separate room, they will need a separate invigilator. See section 1.3.9.

(p) Scripts must be double spaced and in font size 10 to 14. The candidate must include the following on each page of their work:

- centre number
- candidate number
- candidate name
- date of exam
- syllabus and component
- number of pages in the script, for example, '1 of 7', '2 of 7', etc.

NEW Candidates must clearly indicate the corresponding question number next to each answer.

(q) Word-processed scripts must be attached to the relevant answer booklet or question paper (if other candidates are answering directly on the question paper) using treasury tags or string.

(r) Word processors must not include voice-activated software unless the candidate has our permission to use a scribe and/or relevant software.

(s) A third party must not use a word processor for the candidate unless they have our permission to use a scribe, and where the syllabus allows this.

(t) You must attach an Access Arrangements Cover Sheet (Exam Day – Form 4) to each script where a word processor has been used.

(u) We may need to contact you about your candidate's word-processed script(s). Save them securely at the end of each exam and store them securely until the end of the enquiry about results period.

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1.3.6 Modified question papers

NEW A modified question paper is an adapted version of a standard question paper which helps candidates with specific needs access an assessment. The questions are not made easier; instead, the modifications make sure the content is accessible to candidates with specific needs without altering the standard or level of difficulty of the paper. A modified question paper allows candidates to access an assessment using their normal way of working wherever possible.

1.3.6.1 Braille paper

NEW The text in the paper will be presented as Unified English Braille (UEB). Some visual information will be removed and presented as verbal information and some will be simplified and may be presented in a tactile form. Remember to tell us whether you need contracted or uncontracted Braille on the application form.

- Braille papers are only available in the Roman alphabet. We cannot provide Braille papers in languages which use other alphabets or which are character based. If you think this affects your candidate, contact us.
- If candidates answer in Braille, you must provide a transcript for the examiner. Follow the regulations for producing transcripts in section 1.3.5.13. Attach an Access Arrangements Cover Sheet (Exam Day – Form 4) to the transcript. We can only accept Braille responses which use the Roman alphabet; we are unable to accept responses which use other Braille conventions. If you think this affects your candidate, contact us.

1.3.6.2 Coloured paper

Unmodified content is printed on coloured paper. See section 1.3.6.8(g).

1.3.6.3 Modified large print

NEW In these papers, the format of the text is modified as per the modification type, and, where relevant, visual information is simplified. We offer modified large print papers on both A4 and A3 paper, as follows:

- A4 18 point bold: the font is modified so that visual information is simplified and printed in 18 point bold onto A4 sheets.
- A4 24 point bold.
- A3 24 point bold. The question paper is printed in 24 point bold onto A3 sheets. (This modification is the same as 18 point bold enlarged to A3.)
- A3 36 point bold.
- A4 18 point bold enlarged to A3. (This modification is the same as 24 point bold on A3 sheets.)

1.3.6.4 A3 unmodified

The standard paper is enlarged to A3 size. NEW No modifications are made to the text or visuals. This option is not suitable where scaled diagrams have been used.

1.3.6.5 Modified carrier language

Complex sentences are broken down into simpler ones. The questions and difficulty stay the same as for any other candidate, and technical vocabulary is not changed. Modified carrier language papers are only available for certain syllabuses and are not available in language or literature exams. We make sure that the language used in our exam papers is as accessible as possible, so this modification may not be needed for all exams.

1.3.6.6 NEW Tactile diagrams

- Tactile diagrams translate a visual image into a tactile one so a visually impaired candidate can feel them.
- Tactile diagrams are not exact replicas of the print version as details will be simplified.
- Some diagrams are better transcribed with a description rather than in tactile form.

1.3.6.7 Transcript of audio files

NEW You must request transcripts of audio material for use with a live speaker. See section 1.3.6.8(e) for live speaker guidance.

1.3.6.8 NEW Guidance for centres

(a) You must apply for modified question papers using Preparation – Form 3. The Head of Centre, exams officer or Cambridge Associate, in the case of Associate Centres, needs to sign the form before you send it to us.
A Associate Centres must send their forms to their Cambridge Associate.

(b) We will only send modified question papers if you make a final entry for the relevant candidate, syllabus and component. See section 2 for relevant entry deadlines.

(c) You must apply for modified question papers by no later than the deadline, otherwise we may not have time to produce them. We recommend you make final entries for candidates requiring modified papers at the time you request modified papers. Late requests may not be accepted.
A Cambridge Associates should agree earlier deadline dates with their Associate Centres. This will give them time to process the applications and send them on to us.

(d) If retake candidates need modified question papers, contact us as soon as possible to make sure we can provide what you need.

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(e) Live speakers:

- The live speaker must read aloud the contents of the listening exam in the language being assessed.
- If a hearing-impaired candidate needs a live speaker for pre-recorded listening exam components, it should reflect their usual way of working.
- The Head of Centre appoints and manages the live speakers presenting the listening component. The live speakers must be fluent in the relevant language.
- Live speakers should ideally be teachers of the language being assessed and the candidate should know them. Live speakers must not be the candidate's own subject teacher, relative, friend, or peer. The live speakers must be fully aware of these regulations.
- To use a live speaker for pre-recorded exam components, you must also ask for a transcript of the audio file by sending us Preparation – Form 3 by the modified question paper application deadline.
- Ideally live speakers should work with only one or two candidates. If this is not possible there should never be more than six candidates to one live speaker. Candidates must sit down so they can all clearly see the live speaker.
- You should give the live speaker access to the audio files on the day of the exam, at the Key Time. They can then prepare their role from the transcript and hear the speed of delivery. They must not interpret the text in any way. During this time, you must keep the candidates under Full Centre Supervision. Our Key Time regulations apply before and after the exam.
- If the recording involves two or more characters, you can use a separate live speaker for each role, or the live speaker must make it clear which character is speaking.
- Candidates using a live speaker must be invigilated separately and all our invigilation regulations must be followed. Live speakers must not act as invigilators. Other candidates in the exam room must not be disturbed.

(f) UK If a candidate has a visual impairment or processing difficulties and finds reading black text on white paper challenging, you can print a question paper on appropriate coloured paper at your centre. You must tell us if you plan to do this by completing and returning Preparation – Form 3 by the dates in section 1.3.4.

- We may need to print some question papers on coloured paper for you. We will tell you which ones we need to print and which ones you can print.
- Your Head of Centre is responsible for making sure the security and integrity of the question paper is maintained during the printing process.
- We will make a copy of the question paper available for you to download from Digital File Despatch at the Key Time for the exam. We only provide the question paper(s) you include on Preparation – Form 3, that we approved, and only if the candidate has the appropriate entry. Make sure you have asked for all syllabuses and components that you need. If you amend your entries, you must tell us so that we can make the correct question paper(s) available to you on Digital File Despatch.
- We will email guidance about how to securely print question papers to you. You must follow the guidance outlined in this email.
- You must not modify the content of the question paper, for example, changing the font size. You must print question papers on A4 paper unless you have permission from us to make enlargements.
- You must keep signed records of the printing process. These should include:
  - the start time of the exam
  - the syllabus, component, candidate number and print produced
  - the names and job titles of the two staff members who carried out the printing process.

  Record this information on your exam timetable. You may be asked to show these records to an inspector. You must keep these records until we have released certificates.

(g) If a candidate requires an enlarged copy of an answer booklet or an answer booklet on coloured paper, you must produce this. To produce this, you may photocopy a copy of the standard answer booklet onto the appropriate coloured and/or sized paper. You will receive copies of the standard answer booklet in your non-confidential despatch before the exam series. You do not need to tell us if you plan to do this.

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1.3.7 Mental health

A candidate who experiences mental health problems (for example, generalised anxiety disorder, obsessive compulsive disorder, depression) may be eligible for access arrangements. When deciding if access arrangements are appropriate, you must follow our regulations. You must hold evidence of need, which includes a formal diagnosis, to support your application. If a formal diagnosis has not been made, you may wish to review section 1.3.9. Please note, exam- or test-related nerves or anxiety are generally not considered to be reasonable grounds for access arrangements.

1.3.8 NEW Significant illness or hospitalisation during a course of study

If you have a candidate who is experiencing significant disruption to their studies, but will still cover the content of the whole syllabus, email us as soon as possible: info@cambridgeinternational.org

This is different from when something unexpected and adverse happens at the time of the exam. In such cases, see section 5.5 Special consideration.

For candidates who are in a hospital at the time of the exam, please also see section 2.6 for information about alternative venues.

1.3.9 Separate and small room invigilation

(a) You may want a candidate with access arrangements to take the exam separately or in a room with fewer candidates (small room invigilation). Candidates who may need separate or small room invigilation are those with:

- a medical condition
- mental health problems
- a condition which includes hyperactivity, or vocal or motor tics meaning that they may distract other candidates, and/or be anxious about distracting others
- a colour naming assistant, human reader, practical assistant, prompter or scribe, and their answers or conversations may be overheard by other candidates.

For both separate invigilation and small room invigilation you must comply with our invigilation regulations. See section 4.6.

(b) You may want a candidate who is experiencing mental health problems, but does not need any other access arrangements, to take the exam separately with a separate invigilator, for example, if the candidate experiences generalised anxiety and may benefit from being in an environment with fewer people.

(c) If you allow separate invigilation, you are responsible for making sure the candidate takes the exam in a suitable venue. You must provide a trained invigilator. If the candidate also has other access arrangements such as a reader or a scribe, the reader or scribe must not act as the invigilator and there must be a separate invigilator.

(d) You do not need to tell us if you use separate invigilation.

(e) You must follow our regulations at all times.

1.3.10 Emergency access arrangements

If a candidate requires emergency access arrangements, you must try to tell us before you use them. For example, if a candidate breaks their arm before an exam, email or phone us straight away. If you cannot contact us before the exam, the Head of Centre should decide on the day whether to use access arrangements. NEW Send us an application using either Preparation – Form 1 or the Apply for Access Arrangements service as soon as possible. See section 1.3.4(d).

1.3.11 Appeals

To appeal against the outcome of an access arrangement application, see section 7.4 Appeals against access arrangement, special consideration and late arrival decisions.

Important dates

June series

Application deadline for candidates who need modified papers: 21 January 2025

November series

Application deadline for candidates who need modified papers: 1 July 2025

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Section 2: Entries

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PDQ Cambridge Professional Development Qualifications

There are differences in this section for Cambridge Professional Development Qualifications (PDQs). Please see the PDQ Administrative Guide, available from www.cambridgeinternational.org/eoguide

2.1 Candidates

2.1.1 Eligibility

(a) Centres must enter each candidate for their exams.

(b) Candidates may not enter for:

- the same syllabus at two different centres in the same exam series
- restricted syllabuses as outlined in the Cambridge Guide to Making Entries, at two different centres in the same exam series.

(c) Candidates must meet all assessment requirements.

(d) There are no age restrictions.

(e) You must authenticate and, where relevant, mark and moderate all work you send us.

2.1.2 Private candidates

Our assessments are mainly designed for candidates studying at schools and colleges registered with us as centres. However, some candidates who do not attend our centres or who are studying at a Cambridge International School – registered as online may want to enter for assessments. These are known as 'private candidates'.

Important information

Chk You cannot enter private candidates for Cambridge Primary Checkpoint and Lower Secondary Checkpoint.

(a) You must check syllabuses or the Cambridge Guide to Making Entries to make sure they are available for private candidates before you make any entries. You can download syllabuses from www.cambridgeinternational.org. The Cambridge Guide to Making Entries is in the 'Support Materials' section of Direct.

(b) UK Private candidates must be able to meet all assessment requirements. Some options, including those with coursework, are not available to private candidates.

(c) Private candidates must arrange for a centre to enter them for exams. Cambridge International Schools registered as online cannot make entries (unless they have been approved to run their own exam venues) and must make sure the necessary arrangements are in place for their students to be entered as private candidates at an approved Cambridge exam venue.

(d) If you decide to make an entry on behalf of a private candidate, you must pay our fees.

(e) Candidates studying at Cambridge International Schools registered as online must be entered as private candidates. This means some syllabuses, including those with coursework, will not be available to them. This does not apply to Cambridge International Schools registered as online that are entering candidates directly through their own approved exam venues.

(f) Candidates studying at Cambridge International Schools also approved to offer Cambridge programmes online must be entered as school candidates and not private candidates. This is because these candidates will be registered with the school and sit their exams at the school's physical premises.

2.1.3 Transferred candidates

(a) Candidates who need to move to another centre can only continue with the exams if they move to a centre registered with us.

(b) You can change the entry details for these candidates.

(c) You cannot ask to transfer a candidate to another Cambridge centre less than 10 working days before the candidate's first exam in the series.

(d) Candidates cannot transfer to another centre for specific syllabuses or components. They can only transfer for all their assessments in an exam series.

(e) To transfer a candidate:

- The original centre must send us Entries – Form 3.
- The receiving centre must send us Entries – Form 4.

A Associate Centres should send forms to their Cambridge Associate.

(f) Once we receive both forms, we will move the entry from the original centre to the receiving centre. Do not enter or withdraw a candidate who is being transferred. We will do it for you, and we will confirm to you once the transfer is complete.

(g) A candidate who transfers to another Cambridge centre after final entries are made becomes the responsibility of the receiving centre. This centre should allocate its own candidate number to the candidate.

(h) If necessary, the original and receiving centres must make sure internal assessments are completed. Once the transfer is complete, the exams officer at the receiving centre must submit any internally assessed marks and samples.

(i) We will credit the account of the original centre with the entry fees and charge entry fees to the receiving centre for the transferred candidate. We will not charge late entry fees to centres for receiving a transferred candidate.

(j) **NEW** If a candidate needs to take their exams at a venue that is not their registered centre, but you do not wish to transfer their entry, see section 2.6 Alternative venues.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Candidate Transfer Request: Entries – Form 3
- Candidate Transfer Confirmation: Entries – Form 4

2.1.4 Communicating about candidates

Only the Head of Centre, exams officer / centre coordinator or their nominated deputy responsible for the candidate's entry should contact us.

2.1.5 Declaration of interest

(a) A declaration of interest must be made for each exam series where centre staff, or a person associated with the centre:

- is taking a Cambridge assessment themselves
- is involved in administering an exam that is being taken by a person they have an interest in
- has an interest in a person taking a Cambridge assessment at their own centre or at another centre.

Examples of who should make a declaration include, but are not limited to:

- Head of Centre
- exams officer
- invigilators/supervisors
- those involved in the administration and running of exams
- secure storage key holders.

(b) By 'interest', we refer to any relationship which could be perceived to compromise the integrity of:

- your centre
- your centre staff, or a person associated with the centre
- our assessments.

Examples of relationships include, but are not limited to:

- a close relative (including a spouse or partner)
- a relative who you have regular contact with
- a close friend
- a colleague.

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It is your responsibility to manage any 'interests' that have been declared. You should do this by putting the appropriate controls in place to make sure that the integrity of Cambridge assessments is maintained and to protect all those involved.

(c) To notify us, complete and send Entries – Form 1 as soon as you know that the person concerned will be, or has been, entered for a Cambridge exam.
A Associate Centres must submit forms through their Cambridge Associate.

(d) If you have a concern that the integrity of Cambridge assessments has been compromised, see section 5.6 and report your concern to us immediately.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Declaration of Interest: Entries – Form 1

2.2 Estimated entries

Estimated entries are your calculation of how many candidates you will enter for exams. We use estimated entries to work out which materials and question papers you need for exams that take place before the main exam period. Some early exam materials are despatched based on estimated entries, so it is important that you make the estimated entries by the deadline to receive your early materials before the main exam period.

You do not give any candidate details with your estimated entries, so you still need to make final entries (see section 2.3). The fees we charge are based on your final entries only.

2.2.1 Working out your estimated entries

Work out your estimated entries based on the number of candidates studying the subject or the number you are expecting to have. If you are unsure whether you are going to enter any candidates for an exam, make at least one estimated entry. This will make sure you receive one set of early exam materials.

2.2.2 Estimated Entry Form

The Estimated Entry Form lists the syllabuses and components for exams timetabled before the main series.

You must give estimated entry information for these syllabuses. The form will be available from the 'Support Materials' section of Direct:

- in September 2024 for the June 2025 series
- in April 2025 for the November 2025 series
- in September 2025 for the June 2026 series.

We will let you know when the forms are available in the Cambridge Exams Officer eNewsletter.

Send the Estimated Entry Form to info@cambridgeinternational.org by the deadlines.

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Important dates

Deadlines for estimated entries:

- June 2025 series: 10 October 2024
- November 2025 series: 10 May 2025
- June 2026 series: 10 October 2025

If you make major changes to the number of candidates you are entering after you have sent the form, please email us.

Important information

Chk You do not need to send us estimated entries for Cambridge Primary Checkpoint and Lower Secondary Checkpoint syllabuses.

Cambridge Associates / Associate Centres

We will upload the Estimated Entry Form to the 'Support Materials' section of the Cambridge Associate's Direct account. They should email a copy of the form to each of their Associate Centres and ask them to return it by a set date. Cambridge Associates should check the completed forms and send them to us by the deadlines listed above.

2.2.3 Digital File Despatch

We do not upload any confidential materials, pre-release material or early question papers, e.g. art & design, to Digital File Despatch based on your estimated entries. **Confidential materials are only available once you have made final entries.** See sections 1.1.6, 4.2.3 and 4.3.1.

2.3 Final entries

You need to make a syllabus entry for every candidate. We use your entries to work out the number of question papers and exam materials we need to send you. Check your entries carefully before you submit them. Do not send entry files by email. If you have not made estimated entries, you will still receive early exam materials if you make your final entries, but you may not receive materials before the start of the test date window.

We charge late entry fees for any new entries you make, as well as for any entry amendments or syllabus changes after the final entry deadline (see section 2.4). If you make entries or changes after the deadline, this can cause disruption to carefully scheduled processes and create significant extra work. Therefore, we apply late entry fees to recover the costs of this extra work, and to encourage you to make entries by the final entry deadline.

UK The Cambridge Guide to Making Entries contains syllabus and option codes, as well as detailed instructions for making entries. Make sure you use the correct version of the guide for your series and administrative zone. You can find out which administrative zone you are in at www.cambridgeinternational.org/adminzone

All centres in administrative zone 3 can make entries for our 9–1 Cambridge IGCSEs.

Chk See section 2.3.2.4 for Cambridge Primary Checkpoint and Lower Secondary Checkpoint.

2.3.1 Making final entries

UK Make your final entries using Direct. Instructions are in the Cambridge Guide to Making Entries, which is in the 'Support Materials' section of Direct.

- **Candidate details:** You must enter candidate names in full as shown on their identity documents. If you are entering candidates for multiple series, make sure their details are the same for all entries and each series.

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- **Previous entry details:** A candidate's previous entry details are their centre number and their candidate number from the previous series. You need to give them if:
  - you enter them for retake exams in the November series (see section 2.4)
  - you enter them for a group award over more than one exam series (see section 2.5.1)
  - they have taken the AS part of a Cambridge International A Level in a previous series and you enter them for the full A Level (see section 2.5.2)
  - you make an entry that carries forward their marks from a previous exam series (see section 2.5.3).
- **Submitting entries:** Submit your entries once you have checked all your entry information. Log into Direct, go to the 'Submit Entries' section and click 'Submit Entries'. If you do not submit your entries, we will not be able to process them and you will not receive the materials and question papers you need for the exams. **Submit your entries at least two weeks before the entries deadline.** This gives you time to check them and correct any mistakes before the deadline, avoiding any late entry fees.

  For syllabuses with early exam and pre-release materials, you should make your entries earlier than this to make sure your materials are despatched in time.
- Once you have made an entry for either Cambridge IGCSEs graded A*–G or 9–1, you will not be able to move to the other grading scale after the late entries deadline. If you accidentally make an entry for an A*–G syllabus you must withdraw the entry, and re-enter the candidate for the corresponding 9–1 syllabus. You must do this before the entries deadline. The same applies for any 9–1 syllabuses.
- If you identify any errors in your entries after the late entries deadline, contact us immediately. Any changes that we are able to make after the entries deadline will incur our standard late entry fees.

UK If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025 for information about MIS packages and A2C.

Important information

After 20 minutes of inactivity you will be automatically logged out of Direct.

2.3.1.1 UK Unique Learner Numbers (ULNs)

If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025.

Extra guidance

Watch our online tutorials on making entries using Direct at www.cambridgeinternational.org/entries

Cambridge Associates / Associate Centres

We recommend Cambridge Associates make entries for their Associate Centres at least two weeks before the closing date. This allows time to check the entries and resolve any problems before our deadline, avoiding late entry fees. Remember, Cambridge Associates should set earlier deadlines for their Associate Centres.

2.3.2 Confirming entries

Direct allows you to generate statements of entry, candidate entry lists and reports at any point, to confirm the entry status for each of your candidates and to check your entry information is correct. Click the 'Check Entries' tab to access the reports. You can also view possible timetable clashes for any of your candidates in the 'Timetables' tab in Direct.

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2.3.2.1 Entries confirmation despatch

We will send your final entries confirmation despatch within two weeks of receiving your final entries. This includes:

- a candidate entry list showing all your entries by candidate
- a centre summary of entries showing the total number of entries you made for each syllabus and option
- a candidate entry warning list showing any potential timetable clashes for individual candidates.

If you do not receive your entries confirmation despatch, email info@cambridgeinternational.org. If you find errors in your entries documents or on Direct, follow the instructions in section 2.4.

Important information

You will no longer receive printed statements of entry that were included in the entries confirmation despatch in previous exam series. If your region has told us that it is critical for you to receive printed statements of entry, we will continue to send them to you. Download your statements of entry from Direct, from the 'Reports' tab.

2.3.2.2 Statements of entry

Statements of entry are your record of entries, both before and during the assessment. They show the candidate's details, their syllabuses and entry options, and the dates and sessions of each of their timetabled exams. Download your statements of entry from Direct, from the 'Reports' tab.

Share statements of entry with your candidates, including private candidates, so they can check their details. The name shown is the name that will be printed on statements of results and certificates, so it is important to tell us if there are any errors by following the instructions in section 2.4. The candidate should write their name on scripts as it appears on the statement of entry.

Cambridge Associates / Associate Centres

We send statements of entry to Cambridge Associates, who send them to their Associate Centres to check. Associate Centres should let their Cambridge Associate know if they need to make any changes as soon as possible.

UK Regulations

(a) You must make final entries through Direct.

(b) The Head of Centre or Cambridge Associate is responsible for making sure entry data is accurate, complete and submitted on time.

(c) You must check that your entry data is correct and complete on Direct.

(d) Between the entries deadline and the late entries deadline you can make late entries or changes, but we will charge late entry fees.

(e) You can only apply for modified question papers if you have already made a final entry for the relevant candidate, syllabus and component. The final entries deadline and application deadline for candidates who need modified papers is the same date. It is always earlier than the final entries deadline for all other candidates who do not need modified papers. See section 2.3 for relevant entry deadlines and section 1.3.6 for more information about modified papers.

(f) You must assign one four-digit candidate number to every candidate. You cannot change this number after you have made your entries. Do not assign the same number to more than one candidate in the same series. Do not assign duplicate or multiple numbers to the same candidate in the same series.

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2.3.2.3 Entry change requests

NEW Entry changes are not generally accepted after the issue of results.

We do **not** allow an entry change from a full Cambridge International A Level entry (both AS and A2 components) to a Cambridge International AS Level entry. This applies whether the Cambridge International AS Level and Cambridge International A Level have the same or different syllabus codes.

Entry changes are only accepted after the issue of Cambridge International A Level results when the change is:

- from a linear (both AS and A2 components in the same exam series), March carry-forward, June carry-forward or November carry-forward entry option to a best of both entry option
- from one carry-forward entry option (e.g. June carry-forward) to a different carry-forward entry option (e.g. November carry-forward) within the 13-month rule.

PDQ Important dates

Please make your entries at least two weeks before the final entries deadline. This will give you time to check your entries and make any changes before the deadline.

June series

- Cambridge Guide to Making Entries available: end of October 2024
- Entries can be made from: mid-November 2024
- Final entries deadline and application deadline for candidates who need modified papers: 21 January 2025
- Final entries deadline for other candidates: 21 February 2025
- Late entries deadline: 17 April 2025

UK November series

- Cambridge Guide to Making Entries available: end of March 2025
- Entries can be made from: mid-May 2025
- Final entries deadline and application deadline for candidates who need modified papers: 1 July 2025
- Final entries deadline for first-time entries: 16 August 2025
- Entries deadline for retake entries from the June 2025 series only: 21 September 2025
- Late entries deadline: 21 September 2025

2.3.2.4 Chk Entries for Cambridge Primary Checkpoint and Lower Secondary Checkpoint

Submitting teaching group information

You need to enter a teaching group code for each syllabus entry when Direct asks you to do this. We use this information in the diagnostic feedback we give at the end of the series. Assign the same teaching group code to all candidates who are in the same class (teaching group). For example, if your candidates for English are taught in two separate classes, you should enter 'E1' as the teaching group

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code for all candidates in the first class and 'E2' for all candidates in the second class. The teaching group codes for each subject are listed in the table below.

There is only one teaching group code for Cambridge Primary Checkpoint and Lower Secondary Checkpoint Global Perspectives. We do not give diagnostic feedback for Global Perspectives syllabuses.

English as a Second Language								
E1	E2	E3	E4	E5	E6	E7	E8	E9
English								
E1	E2	E3	E4	E5	E6	E7	E8	E9
Mathematics								
M1	M2	M3	M4	M5	M6	M7	M8	M9
Science								
S1	S2	S3	S4	S5	S6	S7	S8	S9
Global Perspectives (for first tests in October 2025)								
G1								

Teaching group codes for both English and English as a Second Language start with the letter E and need to be entered like this on Direct. For diagnostic feedback, teaching group codes for English as a Second Language will appear as L1, L2, L3, etc. The teaching group codes for English will appear as E1, E2, E3, etc.

If you want a teaching group name (class name) to appear on your diagnostic feedback alongside the teaching group code, send us Entries – Form 2.
A teaching group name can be anything that will help you to identify the class more easily – for example, you could use your own class name.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Cambridge Primary Checkpoint and Lower Secondary Checkpoint Teaching Groups Information: Entries – Form 2

Important information

Chk You cannot enter private candidates for Cambridge Primary Checkpoint and Lower Secondary Checkpoint.

Important dates

Chk Make your entries at least two weeks before the deadline. This will give you time to check your entries and make any changes before the deadline.

Deadlines for submitting teaching group information with Entries – Form 2:

- May series: 11 March 2025
- October series: 16 September 2025

May series

- Cambridge Guide to Making Entries sent: end of October 2024
- Entries can be made from: mid-November 2024
- Final entries deadline and application deadline for candidates who need modified papers: 21 January 2025
- Final entries deadline for other candidates: 21 February 2025
- Late entries deadline: 11 March 2025
- Submission deadline for Cambridge Global Perspectives (Checkpoint): 7 April 2025

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Important dates (continued)

October series

- Cambridge Guide to Making Entries sent: end of March 2025
- Entries can be made from: mid-May 2025
- Final entries deadline and application deadline for candidates who need modified papers: 1 July 2025
- Final entries deadline for other candidates: 16 August 2025
- Late entries deadline: 16 September 2025
- Submission deadline for Cambridge Global Perspectives (Checkpoint): 6 October 2025

2.4 UK PDQ Entry fees, late entries, entry changes and retake entries

Details of the fees for all our exams and how to pay are in our fees list. We publish the fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge Early Years Centre or Cambridge International School – registered as online, we send the fees list to you.

We have the right to change the fees list. Please check you are using the latest version.

If you want to change or add entries, do this as quickly as possible. Use Direct online entries to make the changes and send them to us.

Find out more about retake entries at www.cambridgeinternational.org/retakes

Regulations

(a) We charge an entry fee per syllabus per candidate.

(b) There is a fee per candidate for Cambridge ICE and the Cambridge AICE Diploma. You must use the Cambridge Guide to Making Entries to check that your candidates qualify before you enter them. We do not credit a centre's account with entry fees for candidates who do not qualify.

(c) We charge late entry fees for any syllabus and group award entries you make after the final entries deadline.

(d) We charge late entry fees for any changes you make to entry options after the final entries deadline. We charge a late fee for each change. If you change an entry option twice we will charge two sets of late fees.

(e) If a candidate changes their syllabus entry to another syllabus code after the final entries deadline, we charge a new syllabus entry fee and a late entry fee. We do not credit a centre's account with the original entry or transfer the fees to the new syllabus entry.

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Regulations (continued)

(f) You can change candidate information on Direct without incurring late entry fees until the late entries deadline. This means you can change any of the following:

- names
- dates of birth
- gender
- status
- unique candidate identifier
- national identity number
- Chk first language English indicators (Cambridge Primary and Lower Secondary Checkpoint only)
- Chk teaching groups (Cambridge Primary and Lower Secondary Checkpoint only).

(g) When making late entries for candidates who need modified papers, you must contact us as soon as possible. Late requests may not be accepted. If retake candidates need modified papers, please contact us as soon as possible. The earlier you contact us, the more likely we will be able to provide what they need. See section 1.3.6.

(h) If you make an entry for either Cambridge IGCSEs graded A*–G or 9–1, you will not be able to move to the other grading scale after the late entries deadline. If you accidentally make an entry for an A*–G syllabus you must withdraw the entry, and re-enter the candidate for the corresponding 9–1 syllabus. You must do this before the final entries deadline. The same applies for accidental entries for any 9–1 syllabuses.

(i) We cannot change an entry once the candidate has taken the first component of an exam.

(j) We do not accept entries for exams outside the timetabled exam series where the test date window has closed.

Regulations (continued)

(k) UK We accept November 2025 retake entries until 21 September 2025 without charging late entry fees, as long as:

- the candidate sat the same syllabus, with any option code, in the June 2025 series
- you give the correct previous entry details
- you tick the 'retake' box next to the entry. This cannot be added at a later date.

You must only tick the 'retake' box for retake entries from the June 2025 series.

(l) There is not a syllabus entry fee for Cambridge IGCSE staged assessment entry options. However, we still charge late entry fees for any entries we receive after the final entries deadline.

(m) UK After the late entries deadline the Direct online entries page will close and you will not be able to make any changes on Direct.

(n) In some cases you can ask to make or change entries after the late entries deadline by following these instructions:

- If a candidate arrives for an exam they have not been entered for, this is known as an unauthorised entry. They can take the exam as long as they can take all the components for the syllabus option. This means you must have enough spare question papers so the candidate can sit all the components at the right time, not just the specific exam.
- **You must not photocopy question papers.** If you allow a candidate to sit an exam they have not been entered for, you must send us Exam Day – Form 12 once they have completed all the components needed for the entry. See section 5.1.6.
- If you do not have enough spare question papers for each of the relevant components, email info@cambridgeinternational.org

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immediately and we may be able to send you extra question papers. If we cannot send them in time you must tell the candidate that they cannot sit the exam.

(o) We charge a very late entry fee for any entry or change you make after the late entries deadline, even if we do not need to send you extra materials. This also applies to unauthorised entries and changes we accept after the late entries deadline. We may not be able to release results for late entries at the same time as other results.

(p) Fee rates and payment information are in the fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge Early Years Centre or Cambridge International School – registered as online, we send the fees list to you.

(q) We invoice you for any late fees or other priced services you have used.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Reporting an Unauthorised Entry: Exam Day – Form 12

2.4.1 UK Withdrawing a candidate

To withdraw a candidate on Direct, find their details in the 'Administer Exams' dashboard and click the 'Remove Candidate' button.

Regulations

(a) We usually only credit a centre's account with entry fees if you tell us you want to withdraw a candidate before the final entries deadline.

(b) If you withdraw a candidate after the entries deadline for medical reasons, we may credit your centre's account with the entry fee. Email info@cambridgeinternational.org

You do not need to include a medical certificate or statement from a doctor confirming that the candidate was unable to sit the exam(s). However, you must keep a record of these documents and of the candidate's consent to use them. You must show us these documents if we ask to see them. A Associate Centres should contact their Cambridge Associate.

(c) If you have asked us to credit your centre's account with the entry fees on medical grounds after the final entries deadline, please do not withdraw the candidate.

(d) If we approve your request to credit your centre's account with the entry fees on medical grounds, we will withdraw the candidate.

(e) To withdraw a candidate on medical grounds after the late entries deadline, email info@cambridgeinternational.org

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2.5 Group awards, staged assessment and carrying forward marks for internally assessed components

2.5.1 Entries for group awards

For group awards candidates study subjects from specific parts of the curriculum. Group award entries should be made in the series you expect candidates to complete all the group award requirements.

Enter candidates for group awards at the same time as you make your other entries. Use the relevant group award entry.

We offer the following group awards:

- **Cambridge International Certificate of Education (Cambridge ICE)** – for Cambridge IGCSE candidates who satisfy the Cambridge ICE group award rules, using Cambridge IGCSEs graded A*–G. Candidates can also use some Cambridge O Levels towards Cambridge ICE. Cambridge IGCSE (9–1) syllabuses do not count towards Cambridge ICE. To enter a candidate for the award, you must include the entry code '**ICE**' as well as the syllabus and option codes. You can enter candidates in one series or over two series within a 13-month period.
- **Cambridge Advanced International Certificate of Education Diploma (Cambridge AICE Diploma)** – for Cambridge International AS & A Level candidates who satisfy the Cambridge AICE Diploma group award rules. To enter a candidate for the award, you must include the entry code '**ADIP**' as well as the syllabus and option codes. You can enter candidates in one series or over a maximum of five series within a 25-month period.

We do not automatically check group award entries. You are responsible for checking your candidates qualify for the group award before you enter them for it. We will charge the entry fee for the group award even if your candidate does not qualify for it. We will only credit your centre's account with the entry fee if you withdraw entries before the deadline.

Important information

The entry code for a group award should only be entered in the exam series where the candidate is completing the award, i.e. when they are taking the last of their qualifying subjects.

You must enter candidates for each syllabus. We cannot accept entries for the group award only.

Candidates' syllabus entries made during the 13-month period before the exam series that they enter Cambridge ICE count towards the group award. We do not accept entries for any disallowed combination of syllabuses. You should check the syllabus document for disallowed combinations of syllabuses. Retakes do not count towards the group award.

For candidates entering Cambridge ICE in June 2025, syllabus entries made in a maximum of two of the following series can count:

- June 2024
- November 2024
- June 2025.

Candidates' syllabus entries made during the 25-month period before the exam series that they enter the Cambridge AICE Diploma count towards the group award.

For candidates entering Cambridge AICE in June 2025, syllabus entries made in the following series can count:

- June 2023
- November 2023
- June 2024
- November 2024
- June 2025.

Candidates' syllabus entries made during the 13-month period for ICE or 25-month period for AICE, before the exam series in which they enter the group award, **will only count** towards the award if the entries are linked correctly throughout the series. To do this, you must provide the correct previous entry details for the candidate. This makes sure that the relevant syllabus entries made during the 13- or 25-month period are correctly linked.

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More information about group awards is in the Cambridge Guide to Making Entries.

2.5.2 Entries for staged assessment (Cambridge International AS & A Level)

Cambridge International A Level is typically a two-year course, and Cambridge International AS Level is typically one year. Candidates can start some subjects as a Cambridge International AS Level and extend them to a Cambridge International A Level. There are three possible assessment approaches for Cambridge International AS & A Level:

- Candidates take the Cambridge International AS Level only. The syllabus content for Cambridge International AS Level is half of a Cambridge International A Level programme.
- Candidates take the Cambridge International AS Level in Year 1 and complete the Cambridge International A Level in Year 2.
- Candidates take all papers of the Cambridge International A Level course in the same series, usually at the end of the second year of study.

Regulations

(a) If the Cambridge International A Level syllabus allows it, candidates can use their Cambridge International AS Level results towards a Cambridge International A Level in the same subject in a later exam series. AS Level results can be carried forward twice within 13 months of the series when the candidate took the AS Level. If the AS Level includes an internally assessed component, regulation 2.5.3(c) also applies.

Examples:

Candidates can use their Cambridge International AS Level results achieved in the June 2025 series towards a Cambridge International A Level in the November 2025 and/or June 2026 series.

Candidates can use their Cambridge International AS Level results achieved in the November 2025 series towards a Cambridge International A Level in the June 2026 series and/or November 2026 series.

(b) You must give the correct carry-forward option code when you enter a candidate who wants to carry forward a Cambridge International AS Level result. Option codes are in the Cambridge Guide to Making Entries. You must give the candidate's previous centre number and candidate number so we can find their marks. We do not automatically check carry-forward entries.

2.5.3 Carrying forward marks for internally assessed components

Candidates who want to retake a syllabus in a future exam series can retake the written components and carry forward the moderated marks from their internally assessed components. Check if the syllabus allows this in the Cambridge Guide to Making Entries.

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Regulations

(a) If the syllabus allows it you can carry forward Cambridge IGCSE and Cambridge O Level marks once in a 13-month period.

Examples:

A coursework mark for the June 2025 series may be carried forward to the November 2025 series or the June 2026 series only.

A coursework mark for the November 2025 series may be carried forward to the June 2026 series or the November 2026 series only.

(b) You must give the correct carry-forward option code when you enter a candidate who wants to carry forward the mark for an internally assessed component. Option codes are in the Cambridge Guide to Making Entries. You must give the candidate's previous centre number and candidate number so we can find their marks. We do not automatically check carry-forward entries.

(c) Depending on what is allowed by the syllabus (see the Cambridge Guide to Making Entries), marks for internally assessed components can be carried forward towards a Cambridge International AS Level or a Cambridge International A Level. This is only allowed if all the other components of the AS Level or A Level are taken in the current series. This means that a Cambridge International AS Level result that includes carried-forward marks for an internally assessed component cannot itself be used to complete a full A Level. There is more information about carrying forward AS & A Level coursework on our website: www.cambridgeinternational.org/carry-forward-entry-rules

Examples:

Candidates can carry forward their internally assessed component marks achieved in the June 2024 series to complete a Cambridge International AS Level in the November 2024 series. This AS Level cannot be carried forward towards a Cambridge International A Level in the June 2025 series.

Regulations (continued)

Candidates can carry forward their internally assessed component marks achieved in the November 2024 series to complete a Cambridge International AS Level in the June 2025 series. This AS Level cannot be carried forward towards a Cambridge International A Level in the November 2025 series.

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2.6 Alternative venues

Candidates should normally take their exams on your centre premises. This is because your centre premises have passed the school's approval process.

For the reasons below, you can apply for your candidates to sit timetabled exams at a venue other than their registered centre.

To request the use of an alternative venue, you must send us Entries – Form 5.
A Associate Centres must send the form to their Cambridge Associate.

NEW We will not transfer a candidate's entry to another registered centre if they are acting as an alternative venue. We will send results and certificates to the entering centre and not the alternative centre. The entering centre remains responsible for any costs incurred.

If you wish to transfer all of a candidate's entries to another registered centre, see section 2.1.3 Transferred candidates.

We may reject your application if we think the security of the exam will be at risk.

2.6.1 Reasons to apply

(a) You unexpectedly do not have enough space or facilities to conduct the exam in this series.

(b) A candidate needs to take the exam at another location for medical or pastoral reasons, for example, in hospital.

(c) There is essential/urgent building work at the centre which would cause disruption during an exam.

(d) Where the alternative venue you have asked for is a Cambridge International School and you are asking to use this because of national and/or international events.

2.6.2 Reasons an application may not be approved

(a) Where the alternative venue you have asked for is not a Cambridge International School and you are asking to use this because of national and/or international events.

(b) Candidates want to take the exam closer to their home.

(c) Your centre has had previous exam security issues.

(d) Where additional sittings might help if you do not have enough space in your centre. See section 1.2.4.

(e) Ongoing lack of space or facilities at your centre.

(f) NEW Candidates want to make an entry for a syllabus not available in their administrative zone.

(g) NEW Non-essential travel.

This is not a complete list.

2.6.3 Transporting question papers

The way in which question papers are transported to the alternative venue depends on your circumstances:

(a) Candidates should use spare copies of the question paper available at the alternative venue, where possible, if the alternative venue is another Cambridge International School.

(b) If the alternative venue is close to your centre two members of staff (one of which is a senior member of staff) can transport the question papers to the alternative venue in a secure briefcase or other hard case or lockable container. We will advise you when this can be transported before the exam.

(c) If the alternative venue is another Cambridge International School, we may be able to send additional question papers to that centre or electronically upload the question paper to that centre.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Using an Alternative Venue: Entries – Form 5

Important dates

Apply for alternative venues at least four weeks before the exam.

Chk **Cambridge Primary Checkpoint and Lower Secondary Checkpoint**

You can ask to use an alternative venue until:

- May series: 11 March 2025
- October series: 16 September 2025

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Regulations

(a) It is your responsibility to contact the proposed alternative venue before applying.

(b) The proposed security arrangements you give on the form must meet our regulations in section 4.4.

(c) You cannot use an alternative venue unless you have our permission in writing.

(d) You should not split groups of candidates entered for the same subject between your centre and the alternative venue. If a candidate needs to take an exam in an alternative venue, for example they are in hospital, please tell us about this on Entries – Form 5.

(e) You must never send question papers by courier or send them electronically to the alternative venue. We are unable to send confidential exam materials to addresses other than registered Cambridge International Schools.

(f) You must tell the exams officer at the alternative venue if we approve the application and share with them any additional information we give you.

(g) We may consider a breach of these regulations as malpractice. See section 5.6.

(h) UK If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025.

2.7 NEW Not meeting qualification regulations

If exceptional and unforeseen circumstances that are beyond a candidate's control make it impossible for them to meet the regulations for their qualification, please contact us for further information.

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Section 3: Coursework and moderation

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Cambridge Professional Development Qualifications

There are differences in this section for Cambridge Professional Development Qualifications (PDQs). Please see the PDQ Administrative Guide, available from www.cambridgeinternational.org/eoguide

The table below shows the meaning of the key terms used in this section of the Cambridge Handbook.

Key term	Definition
Examined work including practical examined components (excludes speaking tests)	All components that are examined in your centre on a timetabled date/session. This includes practical exams (ICT, IT and computer science and science practicals) and listening exams. You send us the work of all your candidates.
Examined coursework/ examined component (you may also see this called externally assessed)	A syllabus coursework component that we assess. You send the work of all candidates to us to be marked by a Cambridge examiner. The samples database tells you how to send the work to us and by when.
Internally assessed coursework (you may also see this called externally moderated coursework)	A syllabus coursework component that you assess and that we moderate. You send us some or all of the work – the samples database tells you what you need to send and by when.
Internal moderation	If more than one teacher at your centre is involved in the marking of coursework for a component, you internally moderate the marking across teachers and teaching groups. This makes sure there is a consistent standard and rank order across all candidates in the centre. You may need to internally moderate internally assessed coursework and/or non-coursework tests.
Non-coursework tests	Your teachers run and assess non-coursework tests, then we moderate them. Non-coursework tests take the form of an exam within a time period that we set. You send us the marks for all candidates entered for non-coursework tests. You also send us evidence for some or all of your candidates, such as recordings or photographs – the samples database tells you what you need to send and by when.

3.1 The samples database and Submit for Assessment

3.1.1 The samples database

The samples database explains how to administer internally assessed (also known as moderated) coursework, non-coursework tests, examined coursework and some practical examined components.

Use the database to find out:

- when and how to submit your marks for internally assessed coursework, non-coursework tests and some practical examined components
- when and how to submit your candidates' work
- which forms to complete and return with your candidates' work.

For internally assessed coursework and non-coursework tests, you submit all the marks and a sample of your candidates' work to us for moderation. For examined coursework and some practical components, you submit the work of all your candidates to us and we mark it.

Visit the samples database at www.cambridgeinternational.org/samples

3.1.2 Submit for Assessment

Submit for Assessment allows you to submit work online for some internally assessed and/or externally assessed components (such as examined coursework and non-coursework tests), instead of sending them to us on CD or USB, or using Secure Exchange. There is more information about Submit for Assessment on our website:
www.cambridgeinternational.org/submit-for-assessment
You access Submit for Assessment via My Cambridge (see section 1.1.15).

To find out how to submit your marks and sample(s) for a particular component, visit the samples database at www.cambridgeinternational.org/samples

We will not accept any work in hardcopy for components that the samples database indicates you must submit via Submit for Assessment.

Important information

We have withdrawn Outline Proposal Forms (OPFs) from all syllabuses where they were used. Teachers should supervise their candidates' work and have the flexibility to choose when they teach the component. For guidance on developing suitable titles for coursework, essays or projects, go to the School Support Hub: www.cambridgeinternational.org/support

For Cambridge International AS & A Level Global Perspectives (9239) and Cambridge International Project Qualification (9980), additional support materials are available to help teachers supervise their candidates' task setting. You can find these materials on the School Support Hub: www.cambridgeinternational.org/support

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3.2 Internally assessed coursework

Internally assessed coursework is a syllabus coursework component that you assess and that we moderate.

- You must submit marks to us for all candidates entered for coursework components that you assess.
- You must also submit a sample of work for some or all of the candidates – the samples database tells you what to submit (www.cambridgeinternational.org/samples).
- Make sure we receive your marks and sample(s) by the deadline in the samples database. Your candidates' results may be delayed if we do not receive your marks and samples by the deadline.
- Coursework options are not available to private candidates.

See sections 3.5 and 3.6 for more information about how to submit internally assessed marks and samples, and sections 1.1.7 and 3.1.2 for more information about Submit for Assessment.

3.2.1 Authenticating coursework

We need to be confident that the work we assess is the candidate's own before we can award a grade. You are responsible for supervising candidates when they are completing coursework. You must also authenticate their work before you submit the marks.

NEW If you discover plagiarism and/or inappropriate use of generative artificial intelligence (AI) in a candidate's work during the course, you should resolve this internally.

If you discover plagiarism and/or inappropriate use of generative AI when you come to submit work to us, you must not submit it. For help on preventing and identifying plagiarism, see www.cambridgeinternational.org/courseworkandmoderation

We strongly advise you to review our policy about the use of generative AI in student work submitted for assessment as coursework: www.cambridgeinternational.org/generative-ai-in-coursework

Submitting work that contains plagiarised material and/or inappropriate use of generative AI may be considered malpractice. You should contact us if you are unsure whether to submit work or not.

3.2.2 Supervising coursework

(a) Teachers may:

(i) help to choose subjects for investigations, models and topics

(ii) give sources of information, for example, materials, places to visit and references, organisations, or people who might be able to help

(iii) advise whether candidates' ideas will work

(iv) advise on length, approach and treatment

(v) treat coursework as an integral part of the course and give candidates regular class work and/or homework relating to it, as appropriate.

(b) Teachers must also:

(i) supervise work to monitor progress

(ii) make sure candidates avoid plagiarism by stating their sources and advise them how to reference published materials

(iii) make sure work is completed in line with the syllabus and can be assessed against the criteria.

For more guidance on the use of sources in written work, see www.cambridgeinternational.org/courseworkandmoderation

(c) Coursework must be a candidate's own, unaided work. Unless there is subject-specific guidance in syllabus documents and coursework training handbooks that says otherwise, teachers can review candidates' work before it is handed in for final assessment. They can do this orally or in writing. Their advice should be kept at a general level so the candidate leads the discussion and suggests any changes. Teachers must not give detailed advice to individuals or groups on how they can improve their work to meet the assessment criteria. Teachers must not change candidates' work.

(d) Candidates must not use online tools which act as writing assistants in the production of their coursework. Online writing assistant tools identify specific sections of the candidate's work where a correction or improvement to style or tone should be made and may propose specific words that should be used instead.

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(e) Teachers must record full details of any other help they give to individual candidates, or any evidence that the candidate has received specific or detailed advice and correction to their work. They should record this information on their Individual Candidate Record Card, which can be found, where available, in the samples database (www.cambridgeinternational.org/samples). Teachers must consider this help when they give marks for the work.

3.2.3 Presenting coursework

(a) Each candidate must present written coursework on A4 paper, unless the syllabus says otherwise.

(b) Candidates may produce their coursework on a word processor, unless the syllabus says otherwise.

3.2.4 Marking coursework

(a) The teacher must give marks for coursework in line with the criteria in the syllabus. They must give evidence of how they have awarded marks, using the documents we have provided for that syllabus.

(b) Teachers must apply the marking criteria to all pieces of work submitted to us. It does not matter at which stage of the course the candidate produced the work.

(c) You can tell candidates their marks before you submit them to us, but you must tell them that these marks may change after moderation. Candidates can ask you for a review of their marks, and you must manage any review in your centre before you submit the marks to us. **NEW** However, you should not tell candidates their marks for the non-coursework tests listed in section 3.4, and a review of marks is not available for these tests. The rank order of the marks you submit must be your final opinion of the relative merits of all candidates. You can request a re-moderation of coursework with report (Service 5) on behalf of all your candidates at the enquiries about results stage. See section 6.

3.2.5 Internally moderating your marks

(a) If more than one teacher is involved in the marking of coursework for a component, you must internally moderate the marking across teachers and teaching groups. This makes sure all candidates have been assessed against the same standards for a particular syllabus.

(b) To complete internal moderation, each centre must select one teacher per component to act as an internal moderator. The internal moderator is usually a head of department (but can be a subject teacher). Their responsibility is to check that all teachers for each coursework component are marking consistently to the same standard. The internal moderator may move marks for some teaching groups up or down to make sure they are consistent for the whole centre.

(c) For each moderated coursework component, the internal moderator must make sure that a valid set of marks is produced for candidates from your centre. You must produce a list of all candidates in descending order of marks – we call this a rank order. Record these marks on the Working Mark Sheet or Coursework Assessment Summary Form in the internally moderated mark column, and then submit these marks to us.

(d) If only one teacher is involved in the marking of a coursework component, you do not need to internally moderate your candidates' marks before you submit them to us.

(e) For more information go to www.cambridgeinternational.org/courseworkandmoderation

Important information

If you have candidates who are taking an A*–G syllabus, and candidates who are taking the 9–1 equivalent, you must complete a separate Coursework Assessment Summary Form for each group and submit the work and forms to us separately. Do not combine them onto one form.

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3.2.6 UK Absent candidates and not submitting coursework

If a candidate is entered for a coursework component but does not submit any coursework, we cannot give them a grade in that syllabus. They will receive a 'NO RESULT' outcome. The teacher must mark them as absent (with an 'A', not '0') when they submit marks through Direct or Submit for Assessment. When they fill in the Coursework Assessment Summary Form, the teacher must list the candidate's number and name and tick the 'absent' box against that candidate's row on the form.

3.2.7 Incomplete or extra coursework

(a) Some coursework components need candidates to produce several pieces of work (for example, three essays). If a candidate does not complete all parts of the coursework, only give them marks for the work they have submitted.

(b) If a candidate supplies more pieces of coursework than they need to, use the best piece(s) for the candidate's mark, as long as they meet the syllabus requirements.

3.2.8 Not meeting our requirements

If individual teachers or centres do not meet our requirements for coursework, we will tell you what to do. If we believe there is a major problem, we may ask you to find another person to assess coursework components in future exam series.

3.2.9 Submitting coursework for more than one syllabus

(a) You can submit the same coursework for more than one syllabus, unless the syllabus says you cannot do this. Coursework samples must be separated for each component when sending them to us. However, coursework must be relevant, and must be assessed separately for each syllabus according to its criteria.

(b) More than one moderator may check the coursework. You are responsible for making sure a separate copy is available for them and is submitted for each syllabus for which the coursework is being used.

3.2.10 Resubmitting coursework in a later series

A candidate cannot re-use moderated coursework from a previous exam series. They must submit a new piece of work if needed. The work cannot be a reworked version of the work they submitted in a previous exam series. Check the Cambridge Guide to Making Entries to find out whether there is an option for a candidate to carry forward their moderated coursework mark to a future series for the syllabus.

3.2.11 Submitting coursework for external competitions

You may submit your coursework for external competitions, but if you do this you must not state that the work is also being submitted as coursework for a Cambridge syllabus. It will be judged against different criteria, and the outcomes may not be the same.

PDQ 3.3 Examined coursework

Examined coursework is marked by a Cambridge examiner. These components are not available to private candidates.

- For examined coursework you submit the coursework of all your candidates. As we assess the coursework you do not mark it.
- Make sure we receive your examined coursework by the deadline in the samples database (www.cambridgeinternational.org/samples). If it is late we will not accept it.

See sections 1.1.7 and 3.1.2 for more information about Submit for Assessment.

Important information

NEW You will submit work for Art & Design (0400, 0989, 6090 and 9479) via Submit for Assessment. You will no longer be able to submit hardcopy work for Art & Design. Return of Art and Design Work: Coursework and Moderation – Form 5 is no longer available to use. Check the samples database for the submission and completion deadlines for Art & Design.

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3.3.1 Authenticating examined coursework

We need to be confident that the work we assess is the candidate's own before we can award a grade. You are responsible for supervising candidates when they are completing coursework. By submitting coursework you are confirming that it is the candidate's own original work.

NEW If you discover plagiarism and/or inappropriate use of generative artificial intelligence (AI) in a candidate's work during the course, you should resolve this internally before you submit the work.

If you discover plagiarism and/or inappropriate use of generative AI when you come to submit work to us, you must not submit it.
For help on preventing and identifying plagiarism, see www.cambridgeinternational.org/support-and-training-for-schools/support-for-teachers/teaching-and-assessment/plagiarism

NEW Once you submit coursework to us, we may use plagiarism detection software to screen it. Our subject experts will review any coursework we suspect may contain plagiarism. If we find plagiarised work, we may consider it candidate malpractice and therefore not accept the work. The candidate may then receive no marks for that component. See section 5.6.4.

NEW We strongly advise you to review our policy about the use of generative AI in student work submitted for assessment as coursework: www.cambridgeinternational.org/generative-ai-in-coursework. Submitting work that contains plagiarised material and/or inappropriate use of generative AI may be considered malpractice.

3.3.2 Supervising examined coursework

(a) Teachers may:

- (i) help to choose subjects for investigations, models and topics
- (ii) give sources of information, for example, materials, places to visit and references, organisations, or people who might be able to help
- (iii) advise whether the candidates' ideas will work
- (iv) advise on length, approach and treatment
- (v) treat coursework as an integral part of the course and give candidates regular class work and/or homework relating to it, as appropriate.

(b) Teachers must also:

- (i) continually supervise work to monitor progress
- (ii) make sure candidates avoid plagiarism by stating their sources and advise them how to reference published materials
- (iii) make sure work is completed in line with the syllabus and can be assessed against the criteria.

(c) Coursework must be a candidate's own, unaided work. Unless there is subject-specific guidance in syllabus documents and coursework training handbooks that says otherwise, teachers can review candidates' work before it is handed in for final assessment. They can give feedback verbally or in writing. Their advice should be kept at a general level so the candidate leads the discussion and suggests any changes. Teachers must not give detailed advice to individuals or groups on how they can improve their work to meet the assessment criteria. Teachers must not change candidates' work.

(d) Candidates must not use online tools which act as writing assistants in the production of their coursework. Online writing assistant tools identify specific sections of the candidate's work where a correction or improvement to style or tone should be made and may propose specific words that should be used instead.

(e) Teachers must record full details of any other help they give to individual candidates, or any evidence that the candidate has received specific or detailed advice and correction to their work.

Extra guidance

For more guidance on the use of sources in written work, see www.cambridgeinternational.org/courseworkandmoderation

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3.3.3 How to submit examined coursework

What to include

Before you submit your examined coursework to us, check the samples database: www.cambridgeinternational.org/samples. It tells you how to submit your examined coursework.

When you send us your examined coursework, you must do the following:

- Include the forms specified in the samples database. If forms are missing, incomplete or inaccurate this could delay the marking process and the release of results.
- If a candidate has used an access arrangement for their examined coursework, please fill in the Access Arrangements Cover Sheet (Exam Day – Form 4) and include this with your examined coursework. You can download the cover sheet from: www.cambridgeinternational.org/forms

Preparing hardcopy examined coursework

If the samples database asks you to submit hardcopy examined coursework, follow the instructions below. Make sure each piece of work is clearly labelled with your centre number, the candidate number, the syllabus and component. We recommend you use the 'Coursework identification labels' we send in the pre-exam despatch. Download extra labels from www.cambridgeinternational.org/forms (Coursework & Moderation – Label 3).

Send written coursework in plain, thin covers, not in bulky ring binders. Please make sure any tied written coursework is securely fastened.

Do not send valuable materials or large, bulky or fragile items.

Packing and sending hardcopy examined coursework

We send most of the materials you need to return your hardcopy **examined coursework** in the pre-exam despatch.

1 Pack the **examined coursework** for each component in separate script packets.

2 Attach the correct bar-coded label showing your centre number, the syllabus number and component number to the front of each packet.

3 Place the packets in a secure outer package to make sure your examined coursework is not damaged. We do not supply the outer package. You can put a number of packets, for a variety of components, into one outer package. You can use more than one outer package. See section 5.4.1.

4 Stick the coursework address label showing our address onto this package. You can download extra labels from www.cambridgeinternational.org/forms

5 Send your **examined coursework** to the following address. Use a service with a tracking facility and keep a record of your tracking number.

Cambridge International Education
Cambridge University Press & Assessment
DC10
Hill Farm Road
Whittlesford
Cambridge CB22 4FZ
United Kingdom

6 Your **examined coursework** must reach us no later than the deadlines in the samples database (www.cambridgeinternational.org/samples).

7 You must complete our Script Return Form each time you send us hardcopy examined coursework: www.cambridgeinternational.org/script-return-form

Important information

Please pack hardcopy examined coursework carefully. If coursework is damaged, this could delay the marking process and your candidates' results.

Extra guidance

To help you submit your hardcopy examined coursework correctly, watch our online tutorials at www.cambridgeinternational.org/courseworkandmoderation

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If you are preparing hardcopy examined coursework, the labels are available from www.cambridgeinternational.org/courseworkandmoderation and www.cambridgeinternational.org/forms

- Coursework Address Labels: Coursework & Moderation – Label 2
- Coursework Identification Labels: Coursework & Moderation – Label 3

Important information

Do not wait to send your candidates' work at the same time as your scripts for timetabled exams.

3.3.4 Submitting examined coursework for more than one syllabus

You can submit the same coursework for more than one syllabus, unless the syllabus says you cannot do this. However, coursework must be relevant, and will be assessed separately for each syllabus according to its criteria. More than one examiner may mark the coursework. You are responsible for making sure it is available for them.

3.3.5 Resubmitting examined coursework in a later series

A candidate cannot re-use examined coursework from a previous exam series. They must submit a new piece of work if needed. The work cannot be a reworked version of the work they submitted in a previous exam series. Check the Cambridge Guide to Making Entries to find out whether there is an option for a candidate to carry forward their coursework mark to a future series for the syllabus.

3.4 Non-coursework tests

Your teachers conduct and assess non-coursework tests, then we moderate them. They take the form of an exam within a time period that we set.

- You submit marks for all candidates entered for non-coursework tests. You must also send us any samples of evidence we ask to see for some or all of your candidates, such as recordings or photographs. See sections 3.5 and 3.6.
- The samples database tells you how, and by when, to submit marks and samples: www.cambridgeinternational.org/samples. Check it before each series as we update it throughout the year.

The following are non-coursework tests that you assess:

- Cambridge IGCSE foreign language speaking tests
- Cambridge IGCSE first language speaking tests
- Cambridge IGCSE second language speaking tests
- Cambridge IGCSE English as an additional language speaking tests
- Cambridge IGCSE Bahasa Indonesia Speaking (0538/03)
- Cambridge IGCSE Food & Nutrition (0648)
- Cambridge O Level Food & Nutrition (6065)
- Cambridge International AS & A Level language speaking tests.

3.4.1 Timetabling

(a) Some non-coursework tests take place before the main exam period. You must conduct them within the timetabled period (www.cambridgeinternational.org/timetables).

(b) Once you start the non-coursework tests, all candidates must take them as soon as possible to help keep them secure. See section 3.4.6.

(c) Candidates must only take their non-coursework test once. Tests cannot be repeated during the same exam series.

(d) In speaking tests, each candidate must be tested on their own, without other candidates present. See section 3.4.9(g).

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3.4.2 Speaking test materials

For some components, you will receive instructions for teachers/examiners and speaking test cards based on your estimated entries. If your centre has not made estimated entries, we will send you the materials when we receive your final entries. The instructions for teachers/examiners provide instructions for the conduct and assessment of speaking tests. The speaking test cards and the instructions for teachers/examiners are for use in the speaking tests.

Follow the instructions in section 4.3 when you receive the despatch containing these materials.

3.4.3 Estimated entries

We use your estimated entries to work out how many sets of materials you will need for non-coursework tests and other exams that take place before the main exam series. If you do not make estimated entries, you may not have the materials you need to carry out the tests at the right time.* See section 2.2.

Important dates

Deadlines for estimated entries:

- June 2025 series: 10 October 2024
- November 2025 series: 10 May 2025
- June 2026 series: 10 October 2025

3.4.4 Appointing teacher-examiners

(a) You must choose a teacher-examiner to assess non-coursework tests. This would normally be a teacher from the relevant department at your centre, but could be another suitably qualified person. You can choose a teacher who has taught those particular candidates. See section A4 of 'Centre and Cambridge Associate responsibilities'.

(b) A Cambridge Associates are responsible for choosing teacher-examiners for Associate Centres.

3.4.5 Support for teacher-examiners

The School Support Hub (www.cambridgeinternational.org/support) has a range of Cambridge IGCSE speaking test handbooks.

These help you prepare for and deliver the non-coursework tests. They also have marked recordings of candidate work with examiner comments.

Practise marking with online marking workshops at www.cambridgeinternational.org/coursework-training

3.4.6 Special instructions for non-coursework tests where we send confidential materials*

(a) (i) For Cambridge IGCSE English as a Second Language (0510, 0511 and (9–1) 0991, 0993) speaking tests, you can only open the role play cards and instructions for teachers/examiners booklets one working day before the test. Once these confidential exam materials have been opened, the Head of Centre or exams officer should give the material to the head of department or teacher-examiner. Teacher-examiners must give themselves enough time to read the materials and procedures.

(ii) For all other Cambridge IGCSE speaking tests, you can open speaking test cards and instructions for teachers/examiners booklets four working days before the test. Once these confidential exam materials have been opened, the Head of Centre or exams officer should give the material to the head of department or teacher-examiner. Teacher-examiners must give themselves enough time to read the materials and procedures.

(iii) For Cambridge IGCSE and Cambridge O Level Food & Nutrition practical exams (0648 and 6065), you can open the confidential instructions at any point before the test. However, you can only open the question paper packets one working day before the tests take place.

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(iv) **NEW** For Cambridge International AS Level Spanish Language (8022), Chinese Language (8238), French Language (8028) and German Language (8027) speaking tests, you can only open the Conversation task cards and instructions for teachers/examiners booklets one working day before the test. Once these confidential exam materials have been opened, the Head of Centre or exams officer should give the material to the head of department or teacher-examiner. Teacher-examiners must give themselves enough time to read the materials and procedures.

*** The following regulations do not apply to:**

- Cambridge IGCSE First Language English Speaking & Listening (0500/04, (9–1) 0990/04 and 0524/04)
- Cambridge IGCSE First Language Spanish Speaking & Listening (0502/03)
- Cambridge IGCSE Bahasa Indonesia Speaking (0538/03)
- Cambridge IGCSE Chinese as a Second Language Speaking (0523/03)
- Cambridge IGCSE Urdu as a Second Language Speaking (0539/03)
- **NEW** Cambridge International AS Level Afrikaans Language Speaking (8679/01)
- **NEW** Cambridge International AS Level Portuguese Language Speaking (8684/01) and A Level Portuguese Speaking (9718/01).

We do not send confidential materials for these speaking tests. All the materials you need for these tests are in the 2025 syllabus booklets.

(b) For all confidential materials, two members of staff must independently check they have the correct question paper packet before opening it. This includes checking the dates of the exam to make sure they are within the published window.

(c) Materials must not be removed from the centre and the information must stay confidential. When materials are not being used, put them back in your secure storage.

(d) You must store the materials securely in line with our regulations until after the speaking test period on the Cambridge timetable, even if you have completed your tests before that date.

3.4.7 Marking

(a) The teacher-examiner must award marks in line with the criteria in the mark scheme for the component. This is in the instructions for teachers/examiners booklet or the syllabus.

(b) The teacher-examiner must assess candidates during the face-to-face test, and not afterwards from a recording. During the test the teacher-examiner should fill in the marks under the separate headings on the Working Mark Sheet, Coursework Assessment Summary Form, Oral Examination Summary Form or Speaking Examination Summary Form. These are available on the samples database: www.cambridgeinternational.org/samples. Please see section 3.6.2 for how to fill in the forms.

(c) You must submit your total marks to us for all your candidates.

The samples database tells you how to submit your marks for each component. Check it before each series as we update it throughout the year: www.cambridgeinternational.org/samples

3.4.8 Internally moderating your marks

(a) We recommend you appoint only one teacher-examiner for each syllabus. However, if you are entering more than 30 candidates, you may want to use extra teacher-examiners. You must make sure that all teacher-examiners administer the test according to the syllabus. You must also conduct internal moderation of your centre's marks before you send them to us. More information on internal moderation can be found below and at www.cambridgeinternational.org/courseworkandmoderation

(b) Internal moderation makes sure all candidates have been assessed against the same standards for a particular syllabus. Each centre must select one teacher per component to act as an internal moderator. The internal moderator is usually a head of department (but can be a subject teacher who has been involved in the assessment of the tests). It is their responsibility to check that all teachers for each non-coursework test component are marking consistently to the same standard. The internal moderator may move marks for some teaching groups up or down to make sure they are consistent for the whole centre.

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(c) For each non-coursework test component, the internal moderator must make sure that a valid set of marks is produced for candidates from your centre. Record these marks on the Working Mark Sheet or Coursework Assessment Summary Form in the internally moderated mark column, and then submit these marks to us. Refer to the document Internal Moderation of Speaking Tests at Your School on the samples database for more information.

(d) If only one teacher is involved in the marking of a non-coursework test component, you do not need to internally moderate your candidates' marks before you submit them to us.

Important information

If you have candidates who are taking an A*–G syllabus, and candidates who are taking the 9–1 equivalent, you must complete a separate Coursework Assessment Summary Form or Working Mark Sheet for each group. Do not combine them onto one form. Visit the samples database to find out how to submit your marks and sample for a particular component: www.cambridgeinternational.org/samples

3.4.9 Collecting the evidence of candidate performance

(a) You need to collect evidence of candidate performance so we can moderate it. The syllabus document will tell you what we need. The samples database (www.cambridgeinternational.org/samples) will tell you how to send it to us.

(b) You need to provide your own equipment to record and save your tests.

Please see the samples database (www.cambridgeinternational.org/samples) for recording formats we accept.

(c) You must make sure that tests take place in a quiet room. There must also be a separate quiet area for candidates who are waiting or preparing for the test. There must be someone in the preparation room to supervise the candidate(s). If there is more than one candidate in the waiting/preparation room at any time, the supervisor must make sure the room is silent and candidates do not communicate with each other. Other candidates are not allowed in the area, including those who have taken the test.

Remove or cover up any display material which may help candidates in the exam room and in the waiting/preparation room.

You must display the Notice to Candidates and Candidate Warning poster both inside and outside the exam room for all tests. We recommend you print this as A2 size. You will receive copies of each poster in the pre-exam despatch and you can download them from our website at www.cambridgeinternational.org/examday

Important information

- **NEW** For Cambridge IGCSE English as a Second Language Speaking (0510/03, 0511/03 and (9–1) 0991/03, 0993/03), there is no preparation time before the test.
- **NEW** For Cambridge International AS Level Chinese Language (8238/04), Cambridge International AS Level Spanish Language (8022/04), Cambridge International AS Level French Language (8028/04) and Cambridge International AS Level German Language (8027/04) speaking tests, candidates spend five minutes preparing for the Conversation task card part of the test in the exam room with the teacher-examiner.
- You do not need to provide a separate quiet area for:
  - Cambridge IGCSE First Language English Speaking & Listening (0500/04, (9–1) 0990/04 and 0524/04)
  - Cambridge IGCSE First Language Spanish Speaking & Listening (0502/03)
  - Cambridge IGCSE Bahasa Indonesia Speaking (0538/03)
  - Cambridge IGCSE Chinese as a Second Language Speaking (0523/03)
  - Cambridge IGCSE Urdu as a Second Language Speaking (0539/03)
  - **NEW** Cambridge International AS Level Afrikaans Language Speaking (8679/01)
  - **NEW** Cambridge International AS Level Portuguese Language Speaking (8684/01) and A Level Portuguese Speaking (9718/01).

We do not send confidential materials for these speaking tests so candidates do not need any preparation time.

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(d) Check that you have good-quality recording equipment, for example, a digital voice recorder with a separate microphone. The test may be recorded on a mobile phone as long as it does not belong to the candidate; see section 3.4.9(b). The mobile phone should have notifications disabled, to avoid interrupting the recording. Before the test, you must check equipment for the quality of the recording in the room where the tests are being held.

(e) The teacher-examiner is responsible for making sure the recording equipment works correctly.

(f) Once a candidate's test has started you must not pause the recording.

(g) Only one teacher-examiner is allowed in the room during the test. See section A4 of 'Centre and Cambridge Associate responsibilities'.

(h) Before sending us recordings, teacher-examiners must check that all candidates have been recorded and that all recordings are audible and complete. Email us full details straight away if there are any problems (info@cambridgeinternational.org). You must not conduct the tests for any candidate for a second time.

(i) You must introduce each speaking test recording as follows:
- your (the examiner's) name
- the candidate's number
- the candidate's name
- the candidate card number (if applicable)
- the date of the test.

3.4.10 Absent candidates and not completing speaking tests

(a) Candidates who do not take the non-coursework test and who do not qualify for special consideration will not be awarded a grade in that syllabus and will receive a 'NO RESULT' outcome. See section 5.5 for more information about special consideration.

(b) Where the non-coursework test does not count towards the overall grade for the syllabus, candidates who do not attend still qualify for an overall grade but will not receive a separate score or endorsement.

(c) If a candidate does not take the non-coursework test the teacher-examiner must mark them as absent (with an 'A', not '0') when submitting marks. Do not do this if they have been given special consideration to take the test at a later date. Visit the samples database to find out how to submit your marks for a particular component: www.cambridgeinternational.org/samples

(d) On the Working Mark Sheet, Coursework Assessment Summary Form, Oral Examination Summary Form or Speaking Examination Summary Form the teacher-examiner must tick the 'absent' column.

(e) You must have a recording of each candidate's test to prove they took it. We may ask for this.

(f) If a candidate is absent for a non-coursework test and has returned to your centre, you must ask us if they can take it at another time within the test date window. Contact us by email as soon as possible, using the subject line 'Speaking test additional sitting'. This must not delay you sending us the sample and forms. This does not apply to Cambridge IGCSE First Language English Speaking & Listening (0500/04, (9–1) 0990/04 and 0524/04). If an absent candidate will be taking the test at a later date:

(i) State this on the Working Mark Sheet, Coursework Assessment Summary Form, Oral Examination Summary Form or Speaking Examination Summary Form.

(ii) Record the test in the format we specify on the samples database: www.cambridgeinternational.org/samples

(iii) Include the mark on the Working Mark Sheet, Coursework Assessment Summary Form, Oral Examination Summary Form or Speaking Examination Summary Form.

(iv) After the test, submit the recording and a copy of the Working Mark Sheet, Oral Examination, Speaking Examination or Coursework Assessment Summary Form.

(v) The samples database tells you how to submit your marks for each component. Check it before each series as we update it throughout the year: www.cambridgeinternational.org/samples

3.4.11 Not meeting our requirements

(a) We will tell you what to do if individual teacher-examiners or centres do not meet our requirements for non-coursework tests.

(b) If we believe there is a major problem, we may ask you to find another person to conduct and assess the non-coursework tests in future exam series.

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3.5 Submitting marks for internally assessed coursework and non-coursework tests

You need to submit a mark for every candidate entered for an internally assessed coursework component or a non-coursework test.

- For each component that you assess, submit the final mark for each candidate. The final mark you submit for each candidate must match the total mark, or the internally moderated mark (if applicable), you record on the forms you submit with your sample. **NEW** You should keep a copy of the marks you submit for your records.
- If one teacher completes all the marking for the component, no internal moderation is needed.
- If you do not submit a mark for a candidate, they will be awarded 'NO RESULT' for the syllabus.
- Check the samples database: www.cambridgeinternational.org/samples. It tells you how to submit your marks and sample for each component. Check the samples database before each series as we update it throughout the year.

See section A24 of 'Centre and Cambridge Associate responsibilities'.

3.5.1 How to submit marks

Depending on which components you have entries for, you submit marks to us using Direct or Submit for Assessment. Before you submit your marks to us, check the samples database: www.cambridgeinternational.org/samples. It tells you how to submit your marks.

UK If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025 for information about A2C.

Submit for Assessment

1 Visit the samples database to find out how to submit your marks and sample for a particular component. For most components, you submit samples using Submit for Assessment. Make sure you can access Submit for Assessment via My Cambridge (see section 1.1.15): www.cambridgeinternational.org/my-cambridge

2 Submit your marks and upload your sample(s). There is information and an Administrative Guide available on our website: www.cambridgeinternational.org/submit-for-assessment

3 Using the information on the samples database, complete the relevant forms and upload them to Submit for Assessment.

4 Submit your sample(s) and forms.

Direct

If the samples database states that total marks should be submitted on Direct, submit your marks as soon as we have processed your entries. You must make sure you submit all your marks by the deadline in the samples database.

1 Go to your 'Dashboard' in the 'Administer Exams' section. You will see a list by syllabus of all the candidates you need to submit marks for. Submit the marks or show that the candidate was absent (with an 'A' not '0') in the boxes provided. Alternatively you can submit your marks all together using the 'Import Marks' area of Direct. See the 'Extra guidance' box on the next page.

2 Before you submit the marks, run a report to check all the marks you have entered. Click 'Download CSV' in the 'Internally Assessed Marks' tab. It is important that you do this, because once you have submitted a mark you cannot change it through Direct.

3 Once you have submitted your marks, click 'Download Internally Assessed Marks Report'. For most components, your marks automatically appear in Submit for Assessment within 24 hours of you submitting them on Direct. For some components, you will print your Internally Assessed Marks Report and include it in your sample packet when you send it to us. The samples database tells you whether you need to print and submit your Internally Assessed Marks Report to us.

A Associate Centres should submit their marks to their Cambridge Associate according to the instructions on the samples database.

Important information

Submit for Assessment and Direct will log you out if you are inactive for 20 minutes. You will lose any unsaved marks.

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Extra guidance

See our online tutorial and factsheet on submitting internally assessed marks using Direct at www.cambridgeinternational.org/courseworkandmoderation

UK Internal Assessment Mark Sheets (MS1)

We no longer use Internal Assessment Mark Sheets (MS1s). You submit marks according to the instructions on the samples database: www.cambridgeinternational.org/samples. If you submit your sample to us in hardcopy, you must include a printout of your Internally Assessed Marks Report with each sample.

3.5.1.1 Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint Global Perspectives

Use Submit for Assessment to submit marks for Cambridge Primary Checkpoint and Lower Secondary Checkpoint Global Perspectives.

We include instructions about submitting work and internally assessed marks in the Administrative Guide: Using Submit for Assessment, which is available on our website: www.cambridgeinternational.org/eoguide

3.5.2 Carrying forward moderated marks

Please see section 2.5.3.

Important dates

The deadlines for sending us marks and samples of coursework and non-coursework tests are in the samples database: www.cambridgeinternational.org/samples

A Cambridge Associates should set earlier deadlines for Associate Centres to submit their marks. They should check they have the correct information and then send us the marks by the deadlines.

3.6 Submitting internally assessed coursework and non-coursework tests

You need to send us the work of some or all of your candidates, including internally assessed coursework and non-coursework tests you have marked, so that we can moderate your marks.

- Always include a copy of your marks with any hardcopy work you send us (your Internally Assessed Marks Report from Direct, see section 3.5.1), and the forms listed in the samples database.
- You must submit all the work that you have contributed to a candidate's final mark for that component.
- Before you submit samples to us, check the samples database: www.cambridgeinternational.org/samples. It tells you how to submit your marks and samples. Check the samples database before each series as we update it throughout the year.

A Cambridge Associates should work with their Associate Centres to make sure they choose the correct samples. They should set earlier deadlines for Associate Centres to send them their samples and the relevant forms. The Cambridge Associate should then send the samples and forms to us following the instructions in the samples database.

3.6.1 Which candidates should be submitted in the sample?

Use the samples database to check:

- when and how to submit your candidates' work
- how many examples of candidate work you need to submit
- which forms you need to submit with the work.

Submit for Assessment will identify the candidates to be included in the sample for components where marks are submitted on Submit for Assessment.

Find the samples database at www.cambridgeinternational.org/samples

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3.6.2 How to fill in the forms

To show the breakdown of how you arrived at the final mark, you must complete one or more of the following (depending on the component):

- a Coursework Assessment Summary Form (CASF)
- a Working Mark Sheet (WMS)
- an Oral or Speaking Examination Summary Form (OESF or SESF).

For some components you also need to complete a marks breakdown form for each candidate. You may need to submit these forms for all candidates or only the candidates in the sample. Check the instructions on the form and the submission criteria for the specific requirements. All marks breakdown forms must be available for submission if we ask for them.

Download the interactive forms from the 'Forms to include with your sample' column of the samples database. **We recommend you complete them using Adobe Acrobat with the teacher who carried out the assessment.** When completing the forms listed above, please remember:

- Include the marks of all candidates entered for a component, not just the marks of the candidates in the sample.
- You must add up the marks correctly to give the total mark. The interactive forms on the samples database will add up the marks for you and tell you if you have exceeded the maximum.
- UK If only one teacher was involved in the assessment, enter the breakdown of marks and fill in the 'Total Mark' column. The marks in this column must match the marks you submit to us.
- If more than one teacher was involved in the assessment, you must also enter the standardised marks in the 'Internally Moderated Mark' column. The marks in this column must match the marks you submit to us.
- The samples database will tell you how to submit your marks to us. Check it before each series as we may update it throughout the year.
- If a candidate has not completed any work for the component, show that they were absent on the CASF, WMS, OESF or SESF by filling in their candidate details and ticking the 'absent' column.

Important information

If you have candidates who are taking an A*–G syllabus, and candidates who are taking the 9–1 equivalent, you must complete separate forms for each group and send them to us according to the samples database. Do not combine the candidates onto one form.

Important information

Before you submit your marks to us, check the samples database. It tells you how to submit your marks. Check the samples database before each series as we may update the information throughout the year. The samples database is available on our website: www.cambridgeinternational.org/samples

The database tells you the following:

- component, qualification and syllabus information
- how we assess the component
- how to submit materials
- how to choose samples
- who chooses samples
- deadline for marks
- deadline for samples
- forms to include with your samples.

3.6.3 How to submit the samples

What to include

Before you submit your marks and samples to us, check the samples database: www.cambridgeinternational.org/samples. It tells you how to submit your marks and sample(s).

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When you send us your samples you must do the following:

- Include the sample specified in the samples database and all the work that you have contributed to the candidate's final mark for the component.
- Include the forms specified in the samples database. If forms are missing, incomplete or inaccurate this could delay the moderation process and the release of results.
- UK If you need to submit a report showing the component marks you have submitted for all candidates and this is not a syllabus/component that uses Submit for Assessment, you should download and print your Internally Assessed Marks Report from Direct and include it in the packet with your sample.
- If a candidate has used an access arrangement for their internally assessed coursework or non-coursework test, please fill in the Access Arrangements Cover Sheet (Exam Day – Form 4) and include this with your sample. You can download the cover sheet from: www.cambridgeinternational.org/forms

Preparing hardcopy samples

If the samples database asks you to submit hardcopy samples, follow the instructions below. Make sure each piece of work in your sample is clearly labelled with your centre number, the candidate number, the syllabus and component. We recommend you use the 'Coursework identification labels' we send in the pre-exam despatch. Download extra labels from www.cambridgeinternational.org/forms (Coursework & Moderation – Label 3).

Send written coursework in plain, thin covers. Do not use bulky ring binders. Please make sure any written coursework that is tied together is securely fastened.

NEW Do not send valuable materials, items containing organic matter, or large, bulky or fragile items. Such items will need to comply with customs regulations.

Packing and sending hardcopy samples

We send most of the materials you need to return your hardcopy samples in the pre-exam despatch.

1 Pack the samples for each component in separate script packets.

2 Attach the correct bar-coded label showing your centre number, the syllabus number and component number to the front of each packet.

3 Place the packets in a secure outer package to make sure your samples are not damaged. We do not supply the outer package. You can put a number of packets, for a variety of components, into one outer package. You can use more than one outer package.

4 Stick the coursework address label showing our address onto the outer package. You can download extra labels from www.cambridgeinternational.org/forms

5 Send your samples to the following address. Use a service with a tracking facility and keep a record of your tracking number.

Cambridge International Education
Cambridge University Press & Assessment
DC10
Hill Farm Road
Whittlesford
Cambridge CB22 4FZ
United Kingdom

6 Your samples must reach us no later than the deadlines in the samples database (www.cambridgeinternational.org/samples).

7 You must complete our Script Return Form each time you send us hardcopy samples: www.cambridgeinternational.org/script-return-form

Important information

- Before you send the work, check that you have kept the information and materials listed in section 3.6.4.
- Please pack hardcopy samples carefully. If samples are damaged this could delay the moderation process and your candidates' results.

Extra guidance

To help you submit your hardcopy samples correctly, watch our online tutorials at www.cambridgeinternational.org/courseworkandmoderation

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Administrative forms

If you are preparing hardcopy samples, the labels are available from www.cambridgeinternational.org/courseworkandmoderation and www.cambridgeinternational.org/forms

- Coursework Address Labels: Coursework & Moderation – Label 2
- Coursework Identification Labels: Coursework & Moderation – Label 3

Important information

UK Do not wait to send your candidates' work at the same time as your scripts for timetabled exams.

3.6.4 Materials to keep

You must keep the following materials and information until after the enquiries about results period:

- a record of the work you sent us
- a record of the marks you submitted to us. Check the samples database before each series to see how to submit marks for a particular component
- a summary of how you internally moderated marks, if relevant
- copies of the coursework or non-coursework tests in your sample
- all the assessed coursework or non-coursework tests of all candidates not included in the sample, in case we ask you to send another sample of work
- a copy of each form. These forms are an important part of the assessment process and we may need to refer to them as part of our quality checks.

You must store the materials securely. Do not return them to candidates until after the enquiries about results period.

3.6.5 Moderation report

We send a moderation adjustment summary report for each component you have assessed. The report highlights any adjustments we have made to your candidates' marks. We send this to you in your results despatch. See section 6.1.3. We also send you a report from the moderator giving feedback on how you assessed the work. This is included in your results files on Direct.

3.6.6 Returning candidates' work

Please tell us if you would like us to return your moderated coursework samples. If you do not want us to return the work, you do not need to do anything. We do not charge for this. We do not return examined coursework components.

If you want us to return your coursework samples, send us Coursework and Moderation – Form 6, available from our website and the samples database. You must send us the form with your sample, by the deadline on the samples database. If you have already sent us the sample, email info@cambridgeinternational.org by the following deadlines:

- June 2025 series: 20 September 2025
- November 2025 series: 26 February 2026.

We will not be able to return coursework if you ask us after these deadlines. You can return the coursework to candidates as soon as you receive it. We may keep some items for research, exhibition, archive or educational purposes.

When do we return candidates' work to you?

We will return coursework that has not been subject to an enquiries about results service to you:

- between September and November for the June series
- between March and May for the November series.

If you have requested an enquiry about results for the coursework, we will not return work to you until the end of the enquiries about results appeals period.

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Recordings of coursework or non-coursework tests, or work submitted on Submit for Assessment

You should keep copies of all the audio and/or visual recordings you submit for moderation or work you submit on Submit for Assessment. We will not return this work to you.

Important information

We are not responsible if any coursework you send us is lost or damaged.

Administrative forms

Form available from www.cambridgeinternational.org/forms and the samples database www.cambridgeinternational.org/samples

- Return of Moderated Coursework: Coursework and Moderation – Form 6

Important dates

The deadlines for sending Coursework and Moderation – Form 6 are:

- June series: 20 September 2025
- November series: 26 February 2026

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3.7 Submitting Cambridge Global Perspectives work

3.7.1 Chk Cambridge Primary and Lower Secondary Checkpoint Global Perspectives (0838/01 and 1129/01)

You mark your candidates' Team Projects and Research Reports and upload all the work to Submit for Assessment.

3.7.2 How to submit Cambridge Global Perspectives work

Submit internally assessed marks, work and samples for all Cambridge Global Perspectives qualifications via Submit for Assessment. For detailed guidance, use the Administrative Guide: Using Submit for Assessment at www.cambridge international.org/eoguide

A Cambridge Associates should pass these instructions on to their Associate Centres.

Important dates

The deadlines for marks and samples of internally assessed coursework and non-coursework tests are in the samples database: www.cambridgeinternational.org/samples

A Cambridge Associates should set earlier deadlines for Associate Centres to submit their marks. They should check they have the correct information and then send us the marks by the deadlines.

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Section 4: Before the exams

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4.1 UK Forecast grades

You must submit forecast grades for all your candidates.

A forecast grade is the grade the teacher expects a candidate to achieve for each syllabus they are entered for. It is not the teacher's assessment of the quality of the candidate's work during the course, or of their effort.

Where the candidate has partly completed a qualification in an earlier series (for example, a Cambridge International AS Level), the forecast grade should relate to the overall qualification, including the part already assessed.

We use forecast grades to:

- decide syllabus grade thresholds
- help adjust marks if you have applied for special consideration
- carry out checks before we release results.

If you do not submit forecast grades you will disadvantage your candidates. We cannot apply these quality assurance processes without them.

Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint

You do not need to submit forecast grades for Cambridge Primary Checkpoint and Lower Secondary Checkpoint.

The 'Administer Exams' section of Direct will ask you to submit forecast grades. You can ignore this message or submit a forecast grade of 'X' (meaning 'no forecast grade') for your candidates if you prefer.

4.1.1 How to submit forecast grades

UK You must submit forecast grades through Direct before or by the relevant deadline.

You can submit your forecast grades as soon as we have processed your entries.

After 20 minutes of inactivity you will be automatically logged out of Direct.

1 Go to your 'Dashboard' in the 'Administer Exams' section and click on the 'Forecast grades' link in the relevant series. You will see a list by syllabus of all the candidates you need to submit forecast grades for. Or you can submit your forecast grades all together using the 'Import Grades' area of Direct.

See the 'Extra guidance' box on the next page.

2 Choose the correct forecast grade for each syllabus and candidate.

3 If you cannot forecast a grade for a candidate, for example a private candidate, or an ICE or AICE group award, enter 'X' in the 'Forecast Grade' column (meaning 'no forecast grade').

4 Before you submit them, run a report to check all the grades you have entered. Click 'Download CSV' in the 'Forecast grades' tab. It is important that you do this, because once you have submitted a grade you cannot change it through Direct.

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5 To change a forecast grade you have already submitted email info@cambridgeinternational.org

A Associate Centres should submit their forecast grades to their Cambridge Associate and let them know the grades are ready to approve and submit to us.

Extra guidance

View our online tutorial and factsheet on submitting forecast grades using Direct at www.cambridgeinternational.org/beforetheexams

Forecast Grade Forms

We no longer provide printed Forecast Grade Forms in your pre-exam despatch. You must submit forecast grades using Direct.

Important dates

Deadlines for submitting forecast grades:

- June series: 30 April 2025
- November series: 31 October 2025

A Cambridge Associates should set earlier deadlines for Associate Centres to submit their forecast grades. Cambridge Associates should check they have all the information and then send us the forecast grades by the deadline.

4.2 Pre-exam and question paper despatches

We send you the following despatches before the exams, depending on your entries. They contain all the materials you need.

1 **Early question papers despatch:** question papers, confidential instructions and exam materials for specific components, such as practical, project or speaking components where you need materials before the main timetable period. This is mainly based on estimated entries. However, we do send some early items using your final entries only.

2 **Entries confirmation despatch:** documents confirming your entries.

3 **Pre-exam despatch:** exam stationery, including multiple-choice answer sheets, key administrative documents, despatch labels, script packets and attendance registers.

4 **Question paper despatch:** confidential question papers.

5 **Bar-coded labels despatch:** to identify the contents of each script packet you send us.

The packaging material used in our despatch boxes is recycled paper. We encourage you to recycle the paper wherever possible.

Important information

For information and instructions about downloading confidential exam materials, such as early question papers and/or pre-release materials from the School Support Hub and/or Digital File Despatch, see sections 4.2.3 and 4.3.1.

A We send all despatches to Cambridge Associates. They are labelled for each Associate Centre. Cambridge Associates should pass the despatches to their Associate Centres according to their agreed arrangements.

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Important information

For some centres in 2025, we will send your pre-exam despatch (your administrative materials) together with your question papers. If this affects you, we will email you more detailed information.

4.2.1 Dates and contents

The following tables tell you the contents of each despatch for the June and November series and when you can expect to receive them. Remember:

- Your despatch will contain everything you need based on your entries. Therefore, you may not receive everything that is listed in the tables below.
- If you make late entries, or have amended your entries, you may not receive the materials for these in your main despatch. They will arrive at a later date. Contact us if your materials have not arrived within two working days of the exam.
- We include bar-coded labels for early timetabled and non-timetabled components in your pre-exam despatch.

Early question papers

- June series: from November 2024 to March 2025
- November series: from June 2025 to September 2025

The regulations in sections 4.3 and 4.4 apply to early question papers too.

Case study for Cambridge IGCSE Enterprise (0454/01)	Give the case study to candidates straight away. When we receive your final entries, we will also make the case study available via Digital File Despatch.

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UK Early question papers for speaking tests

We send these at the same time as the Early question papers despatch.

The regulations in sections 4.3 and 4.4 apply to early question papers too.

Speaking test cards for Cambridge IGCSE foreign languages and English as a Second Language Cambridge International AS Level languages (8022/04, 8238/04, **NEW** 8027/04 and 8028/04)	For teachers to use in non-coursework tests. Sent in print only.
Speaking test instructions for teachers/examiners for Cambridge IGCSE foreign languages and English as a Second Language Cambridge International AS Level languages (8022/04, 8238/04, **NEW** 8027/04 and 8028/04)	Teacher instructions for non-coursework tests. Sent in print only.

You do not need a question paper for:

- Cambridge IGCSE First Language English (0500/04, (9–1) 0990/04 and 0524/04)
- Cambridge IGCSE First Language Spanish (0502/03)
- Cambridge IGCSE Bahasa Indonesia Speaking (0538/03)
- Cambridge IGCSE Chinese as a Second Language Speaking (0523/03)
- Cambridge IGCSE Urdu as a Second Language Speaking (0539/03)
- **NEW** Cambridge International AS & A Level language speaking tests (8679/01, 8684/01 and 9718/01).

All the materials you need for these speaking tests are in the 2025 syllabus booklets, including:

- component requirements
- mark scheme
- help with administration.

Download the Working Mark Sheet from the samples database (www.cambridgeinternational.org/samples).

Confidential instructions

We send these at the same time as the Early question papers despatch.

You must store these instructions in the same way as question papers. See sections 4.3 and 4.4. You must also follow the regulations in section 5.7.1.

Confidential instructions for practical exams in science syllabuses	These instructions help the member of staff in charge of the laboratory to prepare for the exam. Sent in print only.

Entries confirmation despatch

- June series: February/March/April 2025
- November series: July/August/September 2025

Candidate statements of entry	Most countries no longer receive printed statements of entry in the entries confirmation despatch. Direct allows you to generate statements of entry. Download or print one for each candidate showing their details and syllabuses. Give the statements to the candidates and ask them to check they are correct. If your region has told us that it is critical for you to receive printed statements of entry, we will continue to send them to you. If any details are incorrect on Direct (or printed statements if you still receive them from us), follow the instructions in section 2.4.
Candidate entry list	Shows all your entries by candidate.
Centre summary of entries	Shows all your entries by syllabus and option.
Candidate entry warning list	Highlights any potential timetable clashes.

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UK Pre-exam despatch

- June series: Mid-March to early May 2025
- November series: Mid-August to early October 2025

In your pre-exam despatch, there is a guide to explain what you need to do with each item. We will also send the guide in the Cambridge Exams Officer eNewsletter and you can download it from www.cambridgeinternational.org/beforetheexams

Exam stationery	
Brown paper envelope script packets	To return scripts or internally assessed samples, we provide two different-sized A4 script packets for all your components. You can choose which size envelope to use.
Continuation booklets	We send continuation booklets in your pre-exam despatch for candidates who run out of space in the answer booklets. You can print a supplementary answer booklet for any candidates who run out of space in the continuation booklet. These are available on our website www.cambridgeinternational.org/forms under 'Exam day'.
Formulae and statistics tables	Reference guides for candidates taking mathematics or statistics exams containing important formulae and tables. One table per candidate for specific exams. These are also available on our website www.cambridgeinternational.org/search/gcsearch.aspx?q=Formulae

UK Administrative forms and other materials

Notice to Candidates and Candidate Warning poster	These posters give our exam rules and regulations for candidates. Before the exam period starts, display a copy of both posters outside and inside all exam rooms. Download extra copies from www.cambridgeinternational.org/examday
Attendance registers for non-timetabled and timetabled exams	To record whether each candidate is present or absent at the start of the exam. If any of your candidates are not listed, add them to the bottom. Return the top copy with the scripts in the script packet. Keep the bottom copy for your own records.
Multiple-choice answer sheets	Pre-printed answer sheets for each candidate. Supplementary multiple-choice answer sheets are available from www.cambridgeinternational.org/examday under 'Running exams'.
Assessment forms for practical tests	For practical exams in ICT.

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Despatch and identification labels	
Return labels	Attach to the outer packaging when you return scripts to us.
Bar-coded labels for internally assessed, non-timetabled components, early timetabled components and multiple-choice answer sheets	Bar-coded labels tell us what is in each packet and allow us to track packets at every stage of the marking or moderation process. Place the scripts or samples in the script packet then attach the relevant bar-coded label to the front of the packet. Make sure the script packet is marked with only one bar-coded label, and the barcode on the label is legible and not obstructed. Do not write anything on the bar-coded label or cover it with tape, other labels or anything that covers or damages the barcode. See section 5.4.1.
Labels for returning internally assessed hardcopy samples	If the samples database states you should return a hardcopy sample, attach these labels to the outer packaging when you return internally assessed samples to us for moderation.
Identification labels for hardcopy samples	If the samples database states you should return a hardcopy sample, attach these labels to individual pieces of internally assessed work you send us for moderation.

Question paper despatch

- June series: late March/Early April 2025
- November series: Early/Mid-September 2025

Store the contents of this despatch securely and do not open the question paper packets. See sections 4.3 and 4.4.

Question papers	Confidential question papers for each exam component.

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UK **Bar-coded labels despatch** • June series: Late April 2025 • November series: Late September to early October 2025	
Bar-coded labels for timetabled and non-timetabled components	Bar-coded labels tell us what is in each script packet and allow us to track packets at every stage of the marking process. Place the scripts in the script packet then attach the relevant bar-coded label to the front of the packet. Make sure the script packet is marked with only one bar-coded label, and the barcode on the label is legible and not obstructed. Do not write anything on the bar-coded label or cover it with tape, other labels or anything that covers or damages the barcode. See section 5.4.1.

Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint

Remember:

- The despatches and contents match your entries so you may not receive everything listed in the tables.
- Do not worry if you do not receive materials for any late or changed entries in main despatches. They will arrive at a later date. Contact us if your materials have not arrived within two working days of the exam.

Entries confirmation despatch • May series: March 2025 • October series: September 2025	
Candidate statements of entry	Most countries no longer receive printed statements of entry in the entries confirmation despatch. Direct allows you to generate statements of entry. Download or print one for each candidate showing their details and syllabuses. Give the statements to the candidates and ask them to check they are correct. If your region has told us that it is critical for you to receive printed statements of entry, we will continue to send them to you. If any details are incorrect on Direct (or printed statements if you still receive them from us), follow the instructions in section 2.4.
Candidate entry list	Shows all your entries by candidate.
Centre summary of entries	Shows all your entries by syllabus.

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Pre-exam and question paper despatch • May series: From mid-March 2025 • October series: From early September 2025	
Attendance registers	To record whether each candidate is present or absent at the start of the test. If any of your candidates are not listed, add them at the bottom. Return the top copy with the scripts in the script packet. Keep the bottom copy for your own records.
Brown paper envelope script packets	Use these packets to return scripts after the tests.
Bar-coded labels	Bar-coded labels tell us what is in each script packet and allow us to track packets at every stage of the marking process. Place the scripts in the script packet then attach the relevant bar-coded label to the front of the packet. Make sure the script packet is marked with only one bar-coded label, and the barcode on the label is legible and not obstructed. Do not write anything on the bar-coded label or cover it with tape, other labels or anything that covers or damages the barcode. See section 5.4.1.
Return labels	Attach these labels to the outer packaging when you return scripts to us.
Question papers and supporting materials	Confidential question papers and supporting materials for each test component. Store the contents of this despatch securely and do not open the question paper packets.

4.2.2 Additional exam materials list

For any exam where candidates need extra materials, use our additional exam materials list (www.cambridgeinternational.org/database) to find out:

- which extra materials you need to provide
- which exam materials we provide
- whether candidates should answer directly on the question paper, on multiple-choice answer sheets or in an answer booklet we provide as an insert in the question paper.

The list also contains information about using dictionaries, and the standard materials candidates need for every exam. The 'Additional materials' section on the front covers of question papers says: 'You will need:'. This lists what the candidate needs, and includes items we provide such as an answer booklet, an insert or a map. It also includes the **extra** exam materials that you need to provide to the candidate **as well as** the standard materials that candidates need.

Calculators are **no longer** listed as extra exam materials for mathematics components. See section 5.1.7.1 for guidance about using calculators and what types of calculator can be used.

4.2.3 Early question papers and pre-release materials

UK For syllabuses that have early question papers or pre-release materials, you will receive this material in three ways:

- through Digital File Despatch
- through the School Support Hub
- in print (except for 0400/02; (9–1) 0989/02; 6090/02, 03; 9479/02; 9481/02; 0411/11, 12 and 13; and (9–1) 0994/12).

For information about how you will receive materials for each syllabus that has early question papers or pre-release materials, go to www.cambridgeinternational.org/prerelease

For Cambridge IGCSE Drama (0411 and (9–1) 0994) we will send you a printed copy of the pre-release materials with your question papers for use on exam day.

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Digital File Despatch

To access early question papers and pre-release materials through Digital File Despatch, you must first submit final entries.

For instructions on how to access Digital File Despatch click 'Help' at www.cambridgeinternational.org/dfd

For more information on receiving and storing materials from Digital File Despatch, see section 4.3.1.

A If you are an exams officer for a Cambridge Associate, you will have access to Digital File Despatch but your Associate Centres will not.

You are responsible for transferring confidential materials to your Associate Centres securely, according to your local arrangements. Do not send confidential materials by email.

Early exam and pre-release materials (June 2025 and November 2025 series)

Go to www.cambridgeinternational.org/prerelease to find out which confidential materials you must access using the School Support Hub or Digital File Despatch for the June 2025 and November 2025 series. Instructions about how to access Digital File Despatch are available by clicking 'Help' at www.cambridgeinternational.org/dfd

We also include instructions in the monthly Cambridge Exams Officer eNewsletter.



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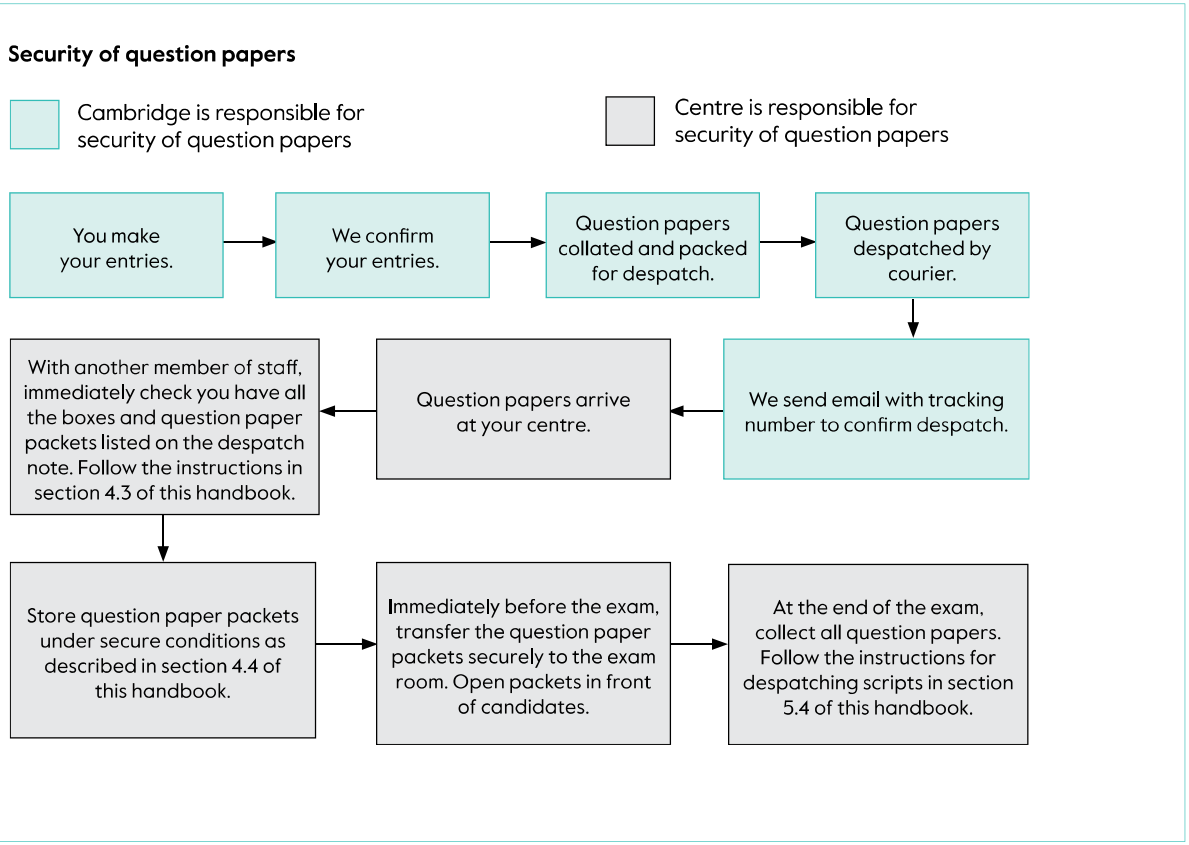
4.3 Receiving question paper despatches

We send you question papers and exam materials before the exam period begins. The sooner you make your entries, the sooner your question paper despatch will arrive. A We send printed question papers and exam materials to Cambridge Associates who then share them with Associate Centres according to local arrangements.

This section explains the regulations you must follow when you receive confidential materials.

Important information

We pack question papers in blue packets. The blue packets must not be opened until the start of the exam. For additional security, the question papers are also packed in an inner transparent bag.



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(a) The Head of Centre, or Cambridge Associate, is responsible for making sure an authorised and trained member of staff is available to receive question paper deliveries. This may include security staff outside of your centre's opening times. They must check the despatch but not open it. Tell us immediately using Before the Exams – Form 3 if the outer packaging is damaged or opened. You must have a procedure in place to make sure the despatch is kept securely as soon as it arrives at your centre. You must keep a record of this procedure.

It is your responsibility to pay for any outstanding customs duties, brokers' fees, local taxes, courier handling charges and other amounts payable in connection with the importation of materials. See section A15.

(b) You must check the following when a despatch arrives:

(i) that the correct centre number and address are shown on the outer box/courier packaging

(ii) that the correct number of boxes/packages have arrived

(iii) that the outer box/courier packaging is intact and there is no sign of damage, tampering or opening.

(c) The authorised person should then contact the Head of Centre or exams officer straight away. If they are not available, for example if your despatch has arrived when your centre is closed, the despatch must stay sealed and be kept secure.

(d) The Head of Centre or exams officer must then carefully check the contents. Another member of staff must watch. This person needs to understand our question paper regulations but does not need to be a senior member of staff. The Head of Centre or exams officer must choose a suitable member of staff for this task.

(e) You must check to make sure you have received blue question paper packets for all components you have made entries for. You are not checking the number of question papers. **The blue question paper packets must stay sealed until the start of the exam.** If they are damaged or open when you receive them, you must tell us immediately using Before the Exams – Form 3.

(f) You must keep a record of this check either by:

(i) ticking next to the listed materials on the despatch note, or

(ii) creating a list of all materials received in each delivery.

(g) The Head of Centre or exams officer, and the member of staff who witnessed the delivery being checked, must sign and date the records.

(h) You must keep the records until you receive certificates, and you must show us the records if we ask to see them.

(i) You must tell us immediately if there are any problems, for example if:

(i) the question papers have not arrived within two working days of the exam. **NEW** It is extremely important that you telephone us if you do not receive question paper packets within two days of the timetabled exam. Do not email us because we may not be able to deal with your query quickly enough

(ii) the delivery has the wrong centre number and address. In this case, do not open the box/outer packaging

(iii) the material does not relate to your entries

(iv) any of the question paper packets listed on the despatch note are missing

(v) the material is damaged

(vi) the seal of any question paper packet is broken, or if there is any sign of tampering

(vii) a question paper packet has been opened before the exam

(viii) a question paper packet has been opened before the exam and the transparent inner bag is also damaged.

For points (v) to (viii) take photos as evidence and send them to us with Before the Exams – Form 3. You must immediately reseal the damaged packet following the instructions in section 5.1.9.1.

For point (iv) if any of the question paper packets listed on the despatch note are missing, send us Before the Exams – Form 2 immediately.

(j) A Cambridge Associates must check the deliveries and tell us about any problems before sending materials to their Associate Centres. They are responsible for keeping all confidential materials secure and implementing local arrangements.

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(k) You must keep the confidential materials secure during these checks, until you transfer them to secure storage. See section 4.4.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Missing Question Paper Packet: Before the Exams – Form 2
- Damaged or Opened Question Paper Packet: Before the Exams – Form 3

4.3.1 Downloading and printing confidential exam materials

For any exams where you need to download confidential materials from Digital File Despatch we email you when we have uploaded your material(s), and email you again when your materials are available to download. For some exams where you need non-confidential and/or pre-release materials, these are available on the School Support Hub well in advance of the exam they relate to. You must download and print them securely. Your Head of Centre is responsible for keeping the question papers and all exam content secure. You must follow these steps when downloading confidential exam materials:

Before downloading the file:

- Prepare your secure environment. All electronic files must be downloaded and/or transferred in a secure environment (e.g. a private office) by the Head of Centre, or exams officer, in the presence of another senior member of staff.
- Prepare your password(s) and any storage devices. Electronic files must be kept secure at all times and any devices containing the electronic files must be password protected.

Before printing confidential exam material:

- Make sure you have enough paper and ink to print all the papers.
- Prepare your secure environment. Confidential materials must be printed in a secure environment (e.g. a private office) by the Head of Centre or exams officer, and another member of staff must watch. This person needs to understand our question paper regulations but does not need to be a senior member of staff. The Head of Centre or exams officer must choose a suitable member of staff. The relevant subject teacher(s) at your centre must not download or be present when files are downloaded.

When printing the question papers:

- Use international A4-size white paper (unless you are printing on coloured paper for an access arrangement).
- Question papers must be printed clearly. You must print them double-sided (using both sides of each piece of paper). Do not print question papers single-sided (using only one side of each piece of paper).
- Print with the scale set at 100%. Do not shrink or enlarge the question paper when you print it.
- If we have given you permission to print on coloured paper, we will upload a standard version of the question paper (unless you have requested extra modifications). You must then print the question paper onto the appropriate coloured paper.
- Some confidential materials contain maps and diagrams. Make sure their scale does not change during the printing process.

After printing the question papers or confidential exam material:

- Seal confidential materials in an envelope.
- Clearly label the envelope with the date of the exam, the session (AM, PM or EV), the syllabus and component.
- The present staff members should sign over the seal of the envelope and clear tape must be placed over the two signatures.
- Store the envelope securely until the exam; see section 4.4.2.

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4.4 Storing confidential materials

You must store question papers securely in line with our regulations.

4.4.1 Checking confidential materials

(a) After the checks in section 4.3, move all confidential materials to your secure container. You must put the question paper packets in timetable date and session order in your secure container. This is so you can select and open the correct question paper packet at the time of the exam.

(b) Question paper packets and other confidential materials must remain unopened and in your secure storage until the time set for the relevant exam. You can open specific confidential materials in the cases below. Two members of staff must check they have the correct confidential materials before opening them. If you are not sure, contact us.

- **Confidential instructions** – You must open some confidential materials, such as instructions for practical exams, before the exam. Please refer to the Handling Confidential Materials poster for the security regulations for each type of component. This is available on our website www.cambridgeinternational.org/forms under 'Before the exams'. Keep confidential instructions secure at all times and do not remove them from the building. When they are not being used, put them back in your secure storage. Do not make copies of them. The Head of Centre is responsible for making sure these materials stay confidential and that no information about them reaches candidates. Never discuss or share the confidential instructions with another centre. Contact us or your Cambridge Associate if you have any questions.
- **Literature question paper packets** – You can open some literature question paper packets for plain text or open book exams one hour before the start of the exam to check the page references to specific editions of texts. The head of department or suitable teacher must open and check them. The Head of Centre or their deputy must watch.
- **Pre-recorded materials** – Where confidential material is pre-recorded as audio files, you must test them before the exam. See sections 5.7.2 and 5.7.5.
- **Erratum notices** – You must open erratum notices as soon as they arrive, unless we say otherwise on the envelope. Once you have read them you must store them securely until the exam.

4.4.2 Storing confidential materials

This section explains our regulations for storing confidential materials. These two layers of security must be maintained at all times.

(a) If you make entries for a component and then withdraw them all, you may still receive the question papers. If this happens, do not open them. You must store them securely until we release results.

(b) You must store exam materials and secure materials downloaded from Direct and Digital File Despatch securely until the time they are needed. You must treat digital confidential materials in exactly the same way as printed materials. If you have printed them you must store them securely with your other question papers and confidential materials. See section 4.3.1.

(c) If you have to store answer scripts before you send them to us you must seal them and store them under the same secure conditions as other confidential exam materials.

(d) If a member of staff is involved in administering an exam that is being taken by a person they have an interest in (see section 2.1.5), they must not have unaccompanied access to exam materials. This applies before the exam (for example, question papers and question paper packets) and after the exam (for example, answer scripts). If the member of staff is the exams officer, another person must be there for all administration relating to the exam. Another person must authorise any documents connected with the exam (for example, access arrangements forms) and fill in Entries – Form 1. See section 2.1.5.

You must have two layers of security to make sure your question papers and confidential materials are stored securely.

- First layer: All confidential materials must be stored in a secure container.
- Second layer: The container must be stored in a secure room.

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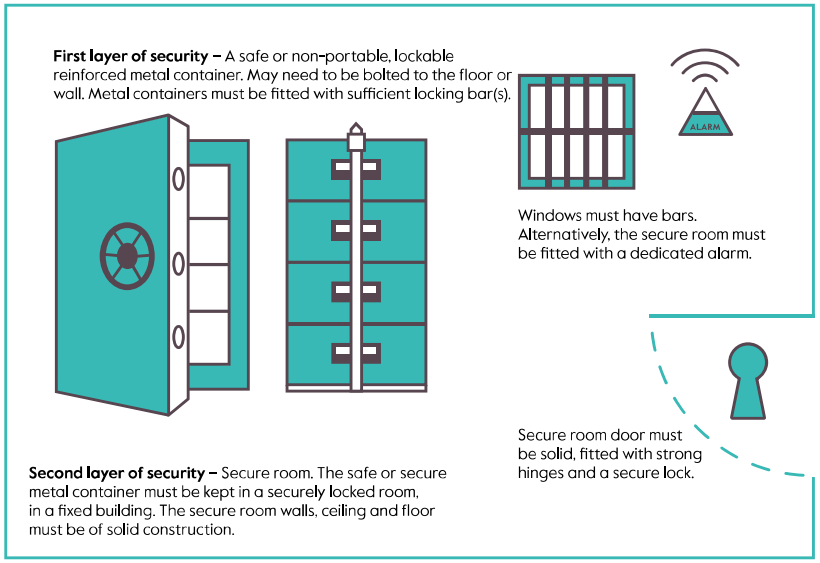

Level 1 – Secure container
Requirement
Question papers and other confidential material must be stored unopened in their own secure container, ideally a strong safe. If a safe is not available, use a non-portable, lockable, solid metal container. If what you are using as a secure container can be easily manually moved, it must be bolted to the floor or wall. Where a metal container is used this must be fitted with sufficient locking bars to prevent the doors/drawers from being forced open. Padlocks used to secure external locking bars must be strong. The secure container must be locked at all times when exam materials are being stored there.

Extra guidance
Any external fixings that secure the container to the wall or floor must be tamperproof. One external locking bar across the middle of a tall metal container may not be enough. Any external fixings that secure the locking bars to the metal container must be tamperproof.

Level 2 – Secure room
Requirement
The secure container must be stored in a locked room in a building. The walls, ceiling and floor of the secure room must be of solid construction. The secure room must be locked at all times when not being used. The walls and ceiling must be made of brick or concrete. Partition or 'stud' walls need extra security measures. Please contact us to discuss your options. The room used to store the secure container should be a dedicated 'secure room' where only exam materials are stored. The room the secure container is in should have no internal or external windows. If this is not possible, windows must be securely fitted with metal bars, or the room must be fitted with a dedicated alarm. Secure room alarms must be on a separate circuit to the main centre alarm. The secure room alarm must be switched on at all times when there are secure materials being stored and the room is unoccupied.

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Level 2 – Secure room (continued)
Extra guidance
If the room has a false ceiling / ceiling tiles, you must make sure there is no access from adjacent rooms. If the secure room is also used for other purposes (e.g. an office) you must make sure that access to the room meets our regulations. There is more information below on who can have a key to the secure room. You must consider extra improvements to make sure that no unauthorised access can be gained to your secure container (for example, by installing a metal cage around the container). If your secure room has windows that require bars, fit these on the inside, rather than the outside, of the windows. Where outside bars are used, you must make sure the bar fixings are tamperproof. Where you have a dedicated secure room alarm you must have a process in place to respond quickly if it is activated.
Requirement
The door to the secure room must be solid, not hollow, and must be fitted with strong tamperproof hinges. Any glass panels in the door must be fitted with metal security bars, or the secure room must be fitted with an alarm system. Please see above for alarm requirements. The secure room door must be fitted with a secure locking mechanism; multiple strong locks are preferable. The secure room must be locked at all times when secure material is being stored and the room is unoccupied.
Extra guidance
If the hinges on your secure room door are on the outside of the room, you must make sure that they are tamperproof.

Requirement
A minimum of two and maximum of three authorised people must be key holders. For example, the Head of Centre, the exams officer and another member of staff. Key holders do not need to be senior members of staff but must have a clear understanding of our question paper regulations. The Head of Centre or exams officer can nominate an appropriate member of staff to be a key holder. Each key holder should be able to access the exam materials independently, in case other key holders are not available for unexpected reasons. The Head of Centre may require the responsibilities for key holding to be temporarily delegated to another suitably trained person. This may be required to cover sickness or other absences and should be appropriately recorded by the centre. Only authorised key holders can access the secure room. Where this is not possible (for example, where an office is used) anyone going into the room must be supervised by an authorised key holder at all times. Access to the secure container must be limited to authorised key holders only. Keys and any access codes to the secure room and secure container must be kept with the key holder at all times. If this is not possible, they must be kept in a separate locked place, ideally another metal key safe.
Extra guidance
Do not label the secure room with any signs that show it is a secure room. Having video surveillance (for example CCTV) on the inside or outside of the secure storage facilities is permitted. However, where you do have video surveillance, this cannot replace or substitute any of the required aspects of secure storage detailed in section 4.4.2 of this handbook. You must make sure that any installation or use of video surveillance complies with local or national laws.

Tell us immediately if the security of the question papers or confidential materials is put at risk by fire, theft, loss, damage, unauthorised disclosure or any other circumstances.

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A Cambridge Associates are responsible for making sure their Associate Centres maintain the security of question papers and confidential materials.

4.4.3 Chk Storing confidential materials for Cambridge Primary Checkpoint and Lower Secondary Checkpoint as part of the Cambridge Primary programme

If your centre is registered and approved to offer Cambridge Primary Checkpoint and/or Lower Secondary Checkpoint only, the minimum requirement is to meet one of the two security layers detailed in section 4.4.2.

Extra guidance

Find support at www.cambridgeinternational.org/beforetheexams

- Our 'How to receive, check and store confidential materials' video explains what you need to do when your question papers arrive. It shows examples of storage facilities so you can check that your secure container and room meet our regulations.
- Our 'Secure storage' video shows examples of storage facilities so you can check that your secure container and room meet our regulations.
- Our Handling Confidential Materials poster explains the security regulations for each type of component. The information on this poster may not reflect local arrangements between Cambridge Associates and their Associate Centres. This poster is available from www.cambridgeinternational.org/forms

If you need advice on security arrangements, please contact us: info@cambridgeinternational.org

A Associate Centres should contact their Cambridge Associate.

4.5 Preparing the exam room

You must follow these regulations when you prepare the exam room. This includes exam rooms for practical exams, e.g. art & design.

4.5.1 Exam venue

All candidates must take the exam at the centre unless you have our permission for them to take the exam somewhere else. See section 2.6.

4.5.2 Exam room

(a) Exam rooms must be suitable for candidates. Think about access, heating, ventilation, lighting and outside noise.

(b) The conditions for practical exams must give all candidates the opportunity to finish their tasks and show their true level of knowledge in the subject.

(c) You must clearly display to all candidates:

- the centre number
- the date
- the start and finish time of each exam
- the syllabus name and number, and component code of each exam.

NEW You must make sure all candidates can read this information. You may need to display this information in multiple places.

(d) You must have a printed copy of sections 4 and 5, and the 'Key Times and Full Centre Supervision' section, of this handbook in each exam room. An electronic copy is not acceptable. We have produced an abridged version of sections 4 and 5 for centres to print out, which is available from www.cambridgeinternational.org/eoguide

4.5.2.1 Clock

All candidates in the exam room must be able to directly see a reliable clock. If you need several clocks in large rooms, they must all show exactly the same time.

All clocks must show the actual time. For candidates using a computer, checks must be made to make sure that the time is correct on each computer.

4.5.2.2 UK Notice to Candidates and Candidate Warning poster

You must display the Notice to Candidates and Candidate Warning poster both inside and outside the exam room for all exams, including speaking & listening tests. We recommend you print the posters as close to 42.0 × 59.4 cm as possible. We will send you copies of each poster in the pre-exam despatch and you can download them from our website at www.cambridgeinternational.org/examday

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4.5.2.3 Display material

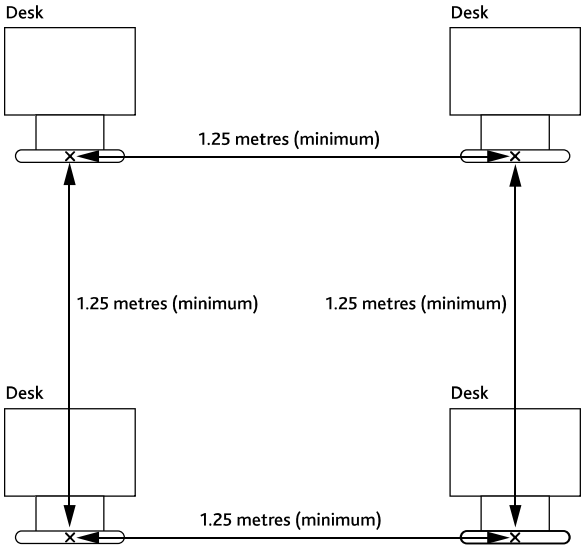
Never display material that might help or distract candidates in the exam room (for example, maps, diagrams, wall charts). You must take extra care with exams in laboratories or libraries.

4.5.3 Seating arrangements

4.5.3.1 Distance between candidates

Maximising the distance between candidates' desks is essential to help prevent malpractice in the exam.

The minimum distance in all directions from the centre of one candidate's chair to the centre of another's must be 1.25 metres (see below). The candidate's chair must be pulled out from under the desk, as though a candidate were sitting in the chair, when this measurement is made.



Use the exam room space to its full potential to achieve greater distances where possible. We recommend a distance of 2 metres in all directions from the centre of one candidate's chair to the centre of another, where it can be achieved. Inspectors will expect to see you using your space in the most effective way.

For multiple-choice papers, if desks are spaced 1.25 metres apart candidates may still be able to see others' work, whether they mean to or not. If this is the case the exams officer could:

- increase the space between desks
- alternate rows of candidates taking different exams
- use extra invigilators.

Where candidates take an exam in a language laboratory, the minimum distance in all directions from the centre of one candidate's chair to the centre of another's must be 1.25 metres. If you cannot do this you must use screened booths instead. These may restrict invigilators' view of candidates so you will need to use more invigilators.

Where candidates sit an exam in a computer laboratory, the minimum distance between the outer edge of one monitor to the other should be 1.25 metres. If you cannot do this, candidates must sit at alternate monitors or in screened booths. These may restrict invigilators' view of candidates so you will need to use more invigilators.

You can contact us or your Cambridge Associate for advice.

4.5.3.2 Written exams

(a) All candidates must face in the same direction.

(b) They must sit in candidate number order, with candidate numbers or index numbers on each desk, except where variation is needed to support candidates with access arrangements.

(c) Each candidate must have their own desk or table large enough for question papers, maps, equipment and materials for practical exams, and answer booklets/paper.

(d) Ideally do not use desks with shelves in exams. Candidates could use these shelves to store notes or other unauthorised items. If no other desks are available, invigilators must check the shelves before the exam, and must make sure candidates do not place anything on them during the exam. You could appoint extra invigilators to monitor this.

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(e) Candidates who are working on a drawing board set on an easel or another non-horizontal surface should sit in an inward-facing circle or similar if possible.

(f) You may hold other exams in the room at the same time, as long as candidates are not disturbed. We will not consider applications for special consideration on the basis that candidates were disturbed by the administration of another exam in the room.

4.5.3.3 Candidates with a contagious disease

(a) If a candidate has a contagious disease, decide whether they are fit to take the exam and whether it is safe to have an invigilator in a separate room with them. If they take the exam, all exam regulations must be followed in the separate room. See sections A4 and A5 of 'Centre and Cambridge Associate responsibilities'.

(b) After the exam you must photocopy the candidate's script and return this photocopy with the other candidates' scripts as normal. Seal the original script in a transparent file with a visible note explaining the situation. Store the original script securely and contact us for advice, or visit www.cambridgeinternational.org/help and type 'soiled scripts' into the search box.

4.5.3.4 Seating plan

You must produce a seating plan **before each exam**. It must show the position of each table and chair, and where each candidate will sit. It must also show the position of the invigilator's desk and the direction the candidates will face.

You must check and, if necessary, update your seating plan during each exam.

You must keep a signed record of each seating plan. We may ask to see your seating plans at any time until you receive certificates. See section 5.1.5 for more information about seating plans and an example of a seating plan.

Extra guidance

Use the first section of our Exam Day Checklist to make sure you are ready for the exams ahead and your preparations meet our regulations. Download the checklist from www.cambridgeinternational.org/examday

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4.6 Invigilator requirements

(a) Invigilators are the people in the exam room responsible for the conduct of an exam. They:

- make sure the exam follows our regulations so that candidates have the opportunity to show what they know and can do
- keep the exam secure before, during and afterwards
- prevent and report suspected malpractice
- prevent administrative errors.

(b) The Head of Centre must use trained and experienced adults as invigilators. The Head of Centre must decide who is suitable.

(c) The Head of Centre **must** make sure that all invigilators know what is expected of them and are fully briefed and trained. You must keep a record of this training until you receive certificates.

(d) You must have a copy of sections 4 and 5, and the 'Key Times and Full Centre Supervision' section, of this handbook in each exam room. We have produced an abridged version of sections 4 and 5 for centres to print out, which is available from www.cambridgeinternational.org/eoguide

(e) Invigilators must:

- understand the regulations in sections 4 and 5 of this Cambridge Handbook
- understand our Key Times and Full Centre Supervision regulations; see the 'Key Times and Full Centre Supervision' section
- be familiar with the Notice to Candidates and Candidate Warning poster
- understand any specific regulations relating to the subjects being examined
- give their full attention to the conduct of the exam and move around the room
- tell the Head of Centre if they suspect malpractice; see section 5.6.

(f) Invigilators must not do any other task not related to the exam (for example, marking) in the exam room.

(g) Apart from one device to ask for help, invigilators must not have access to any other form of communication while in the exam room.

(h) You must keep signed records of the following:

- invigilator training records
- invigilators or supervisors used for each exam or period of Full Centre Supervision
- actual start and finish times of your exams
- start and finish times of any periods of Full Centre Supervision
- any changes to invigilators during each exam or period of Full Centre Supervision.

We may ask to see these records at any time until you receive certificates.

(i) **Invigilator numbers**

(i) You must have at least one invigilator for every 30 candidates. All candidates in the exam room must be visible to one or more invigilators at all times.

(ii) Invigilators must be able to ask for help easily, without leaving the exam room or disturbing candidates. Invigilators can have a mobile phone in the exam room for this purpose only. They must keep the phone on silent mode and away from candidates.

(iii) A teacher who has prepared the candidates for the exam must not be the only invigilator at any time. You must make sure appropriate invigilators are available to take any candidates to the washroom, if needed. Where there is one invigilator, you must make sure they can contact an appropriate member of staff without leaving the exam room or disturbing candidates.

(iv) For practical tests, you must have at least two invigilators in each room at all times. The ratio of invigilators to candidates in the exam room must not drop below 1 to 20 at any point during the exam. At least one invigilator should be a subject specialist.

For practical tests for the following syllabuses, see section 5.7.4:

- Cambridge IGCSE ICT (0417) and (9–1) 0983
- Cambridge International AS & A Level Information Technology (9626)
- Cambridge International AS & A Level Computer Science (9618).

For all our art & design syllabuses, you must have at least one invigilator for every 30 candidates.

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(v) For practical exams where we require a supervisor, the supervisor must not be counted as an invigilator.

(vi) For listening exams, a member of staff who understands the language of the test should be there to deal with any technical problems. Do not count them as an invigilator.

(vii) In exams where questions or passages must be read to candidates, an invigilator must be there as well as the reader.

(viii) You can change invigilators during an exam, as long as the number of invigilators in the room does not fall below the required number. You must keep a record of any invigilator changes during the exam.

(ix) Invigilators can be supervisors for Full Centre Supervision.

(j) **Invigilator suitability**

(i) The Head of Centre cannot let anyone who has an interest in a candidate invigilate an exam by themselves. If the Head of Centre decides to use a candidate's parents/guardians/carers or relatives, they must send us Entries – Form 1 before the exams. See section 2.1.5.

(ii) A reader, scribe or practical assistant cannot also be an invigilator for the same exam.

Extra guidance

You are responsible for training your invigilators before the exam, even if they are experienced. Download our training presentation 'Invigilating Cambridge exams' from www.cambridgeinternational.org/training-invigilators. You can adapt it to train your invigilators or simply read it to refresh your own memory.

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Section 5: Exam day

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5.1 UK At the beginning of the exam

Candidates must take their exams in the correct timetabled session. You must schedule exams within the appropriate timetable session in compliance with the relevant Key Time. See the 'Key Times and Full Centre Supervision' section and section 1.2.2.

If you cannot meet these requirements you must apply for a timetable deviation. See section 1.2.3.

You are responsible for giving candidates their exam times.

Extra guidance

We offer free training to all exams officers which focuses on our regulations and how to administer exams. This is available via the Online Learning Area: www.cambridgeinternational.org/learningarea. See the Cambridge Exams Officer eNewsletter and section 1.1.14 of this handbook for more information. We have a range of support for exams officers before and during exams, including online video tutorials, invigilator training materials and 'how to' guides at:

- www.cambridgeinternational.org/beforetheexams
- www.cambridgeinternational.org/examday

We also have a video to help students understand what to expect on exam day. The video is in the 'Exam administration' section of our website at www.cambridgeinternational.org/what-to-expect-on-exams-day

5.1.1 Identifying candidates

The Head of Centre must make sure invigilators can check each candidate's identity. Identity checks must be respectful of religious customs and comply with relevant local laws.

Private candidates your centre does not know must prove their identity, for example with an ID photocard or passport. Each time they attend a session you must check that they are the same person who was entered for the exam. Identity checks must not disturb any candidates who are already taking their exam.

5.1.2 Candidate numbers

You must give all candidates their centre number and candidate number before the exam. You must also clearly display each candidate's number or index number on their exam desk.

5.1.3 Attendance registers

The attendance register records all the candidates registered to take each exam. We send you pre-printed attendance registers before the exams.

Use them to record whether the candidates listed are present or absent. If you do not receive the attendance register for an exam, use the supplementary attendance register, which is available to download and print from our website (www.cambridgeinternational.org/forms). Follow the instructions for returning attendance registers in section 5.4.1. If you have candidate(s) taking an exam in a separate exam room at your centre or at a different venue, do not send us a separate attendance register. Mark them as 'present' on the main attendance register and return their scripts in the same packet as the other candidates taking the exam.

If you do not fill in the attendance registers properly this can delay candidates' results.

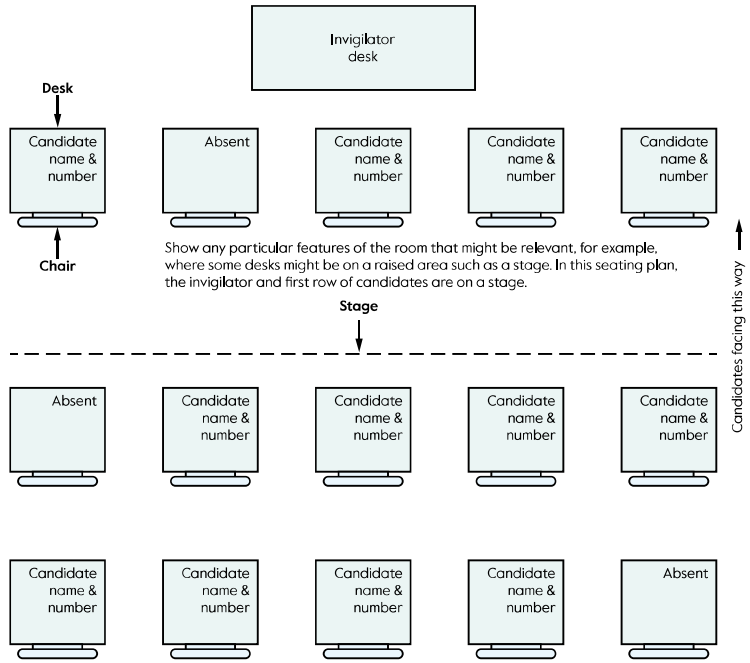
Keep a copy of all completed attendance registers and store them securely. We may ask to see them at any time until you receive certificates.

Extra guidance

Watch our video for guidance on completing attendance registers at www.cambridgeinternational.org/examday

Example seating plan

Show the direction candidates are facing by including position of chairs or an arrow.
Show where candidates are sitting by marking names and candidate numbers on each desk.



5.1.4 Additional exam rooms

If you are unable to fit all the candidates sitting a certain component into one exam room, you can use one or more additional exam rooms. You do not need to tell us. You must set up any additional exam rooms in the same way as your main exam room. See sections 5.1.5, 5.1.9 and 5.3.1(f) for further information.

5.1.5 Seating plan

Before each exam, you must produce a seating plan to show how the exam room is set up. It shows the position of each table and chair, and where each candidate sat.

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It must also show the position of the invigilator's desk and the direction the candidates faced. During each exam, you must check your seating plan is accurate and update it if necessary. Seating plans must not be produced after the exam has finished.

You must keep signed records of the seating plan for each exam session. We may ask to see the seating plan and invigilation records at any time until you receive certificates.

5.1.6 Unauthorised entries

If a candidate arrives for an exam they have not been entered for, they can take the exam as long as:

- they can take all the components needed for the syllabus option. This means you must have enough spare question papers so the candidate can sit all the components at the right time, not just the specific exam. You must not photocopy question papers. If you do not have enough spare question papers, you should not allow the candidate to sit the exam
- you add them to the attendance register for each component they take. Once they have finished all the components for the entry, send Exam Day – Form 12 to us or to your Cambridge Associate straight away
- you can identify the candidate; see section 5.1.1.

We will then mark the candidate's scripts, enter them for the entry option and give a grade. We will charge a very late entry fee. See section 2.4.

See the fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge Early Years Centre or Cambridge International School – registered as online, we send the fees list to you.

It may not be possible for us to release results for these entries at the same time as other results.

If we find any candidates who have not been entered for a syllabus but who have enough marks to make up a valid entry option, we will enter the candidates for you. We will charge very late entry fees, as described above.

If the candidate did not take enough syllabus components to make a valid entry option we will not enter them for that syllabus. However, we may send you an invoice to cover the administrative and marking costs.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Supplementary Multiple-Choice Answer Sheet: Exam Day – Form 2a
- Reporting an Unauthorised Entry: Exam Day – Form 12
- Supplementary Answer Booklet: Exam Day – Form 13

5.1.7 Stationery, materials and other equipment

We update our additional exam materials list before each series. For components where candidates need extra materials, use the list (www.cambridgeinternational.org/database) to check:

- which extra materials you need to provide
- which exam materials we provide
- whether candidates should answer directly on the question paper, on multiple-choice answer sheets or in an answer booklet we provide as an insert in the question paper.

The 'Additional materials' section on the front covers of question papers says: 'You will need:'. This lists what the candidate needs, and includes items we provide such as an answer booklet, an insert or a map. It also includes the **extra** exam materials that you need to provide to the candidate **as well as** the standard materials that candidates need. **NEW** It is your responsibility to make sure all texts and materials you provide to candidates are lawfully acquired and used in accordance with the relevant intellectual property laws.

Calculators are **no longer** listed as extra exam materials for the mathematics components. See section 5.1.7.1 for guidance about using calculators and what types of calculator can be used.

We send continuation booklets in your pre-exam despatch for candidates who run out of space in the answer booklets. You can print a supplementary answer booklet for any candidates who run out of space in the continuation booklet. These are available on our website. Where we have not provided continuation booklets, give your candidates additional sheets of A4 lined paper if needed.

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The invigilator must only give specified items to candidates.

For multiple-choice tests we provide individual pre-printed answer sheets for each candidate. The invigilator must make sure that each answer sheet is given to the correct candidate and that it is for the right subject and component. If you do not receive these in time for the exam, electronic copies of supplementary multiple-choice answer sheets are available to download and print from our website. For modern foreign language exams there are different answer sheets for different syllabuses. See www.cambridgeinternational.org/multiple-choice

Candidates must:

- provide their own pens, pencils, ink, drawing instruments (including rulers) and erasers
- write their answers clearly in permanent, non-erasable black or dark blue ink
- use soft pencils (type B or HB) for multiple-choice tests
- only use pencils or pens in other colours for diagrams and maps if the question paper says they can.

During the exam candidates must not use:

- red or green ink
- correction fluid or correction tape
- highlighter pens on answer sheets, answer booklets or in the answer sections of combined question and answer booklets.

Candidates may use highlighter pens on question papers or question sections of combined question and answer booklets.

5.1.7.1 Calculators

Unless the syllabus or the front of the question paper say candidates cannot use calculators, candidates can use a calculator if they want to.

See page 2 of the additional exam materials list (www.cambridgeinternational.org/database) for a list of mathematics components where calculators are **not** allowed.

Invigilators should check a sample of the candidates' calculators before the start of the exam to make sure they meet the regulations below.

For exams where calculators are allowed, you must tell candidates the following:

(a) The size of the calculator must be suitable for an exam.

(b) The candidate is responsible for the calculator's power supply and it must be built into the calculator. They can bring a spare set of batteries into the exam in transparent packaging.

(c) The candidate is responsible for making sure the calculator works.

(d) The calculator must be silent, with a visual display only.

(e) We will not give the candidate special consideration for a calculator fault.

(f) Candidates must not have calculator cases (unless they cannot be removed), instruction leaflets or any instructions or formulae printed on the lid or cover of a calculator, or similar. An invigilator should check any cover or case that the candidate cannot remove to make sure it does not contain any unauthorised information.

(g) Candidates must not borrow calculators from other candidates during the exam for any reason. However, the invigilator can provide a replacement calculator if the centre has one.

(h) Candidates must clear any information and/or programs stored in the calculator's memory before and after the exam. Retrieving prepared information and/or programs during the exam, or removing question paper content from the exam room, is malpractice.

(i) Candidates can use programmable calculators. However, we do not allow calculators with any of the following facilities, unless the syllabus says otherwise:

- graphic display
- data banks
- dictionaries
- language translators
- retrieval or manipulation of text or formulae
- QWERTY keyboards
- built-in symbolic algebraic functions (output must be numeric not algebraic)

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- symbolic differentiation or integration (output must be numeric not algebraic)
- remote communication.

Using any of these is malpractice. We do not recommend any particular brand of calculator.

5.1.7.2 Dictionaries

We do not allow electronic dictionaries in any exam. This includes tablets and e-readers.

Cambridge O Level and Cambridge International AS & A Level

We do not allow dictionaries unless the syllabus says candidates can use them.

Cambridge IGCSE and Cambridge IGCSE (9–1)

We allow simple translation dictionaries, except in language exams or where the syllabus says candidates cannot use them. 'Simple translation dictionary' means a dictionary that only translates the word and not the meaning or definition of the word.

Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint

We allow simple translation dictionaries in science and mathematics tests. We do not allow them in English and English as a second language tests.

5.1.7.3 Science papers

(a) Candidates must have the following materials in all science papers:

- ruler (300 mm)
- protractor.

We do not list them on science question papers.

(b) You can give candidates graph paper if they ask for it.

(c) Candidates can use calculators in all science papers.

5.1.7.4 Mathematical tables

Candidates can only use mathematical or statistical tables that the syllabus allows or that are included in the 'Additional materials' section of the question paper. Candidates must have them for the whole exam.

5.1.7.5 Geography papers

Where a map is part of a question paper, candidates can use string and/or a magnifying glass if they want to.

5.1.8 Authorised and unauthorised materials

5.1.8.1 Authorised materials

(a) In addition to stationery, materials and equipment in section 5.1.7, candidates can only take materials into the exam room if the instructions on the question paper, in the additional exam materials list or in the syllabus booklet say they are allowed.

(b) The Head of Centre can decide whether to allow candidates to bring food and drink into the exam room. If they decide to allow this they must make sure candidates follow our regulations on packaging and labelling (see below) and that other candidates are not disturbed.

(c) The Head of Centre can decide whether to allow candidates to bring standard wrist watches into the exam room. If you allow this, invigilators must make sure candidates place the watches on their desk and that invigilators can see them.

5.1.8.2 Unauthorised materials

(a) Unauthorised materials are those that potentially enable or assist candidates to compromise the integrity of the assessment by:

- concealing information that may be relevant to the assessment
- sharing information about the assessment
- accessing information that may be relevant to the assessment.

NEW Unauthorised materials also include those that put the health and safety of others at risk. The following are examples of unauthorised materials:

- electronic devices with data storage and/or communication capabilities by any method. For example, mobile phones, cameras, e-readers, Bluetooth headsets, tablet or laptop computers and 'smart wear' such as smart glasses and smart watches
- revision notes of any kind
- calculator cases
- non-transparent pencil cases

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- any packaging with images or text on it (candidates should put food or drink in plain packaging)
- **NEW** weapons of any kind.

This list does not include every possible item.

Use your judgement by asking yourself whether the item potentially allows a candidate to hide or access information in the exam room or areas accessed by a candidate during an exam, including washrooms.

(b) Candidates must switch off all electronic devices and leave them outside the exam room. They must leave other types of unauthorised material outside the exam room or give them to the invigilator before the exam begins. Invigilators must put the materials where candidates cannot see or reach them.

(c) You and your invigilators must be alert to candidates attempting to bring unauthorised materials into the exam room and must report all instances to us.

(d) Having unauthorised materials in the exam room is a breach of our regulations and you must inform us using the relevant suspected malpractice form. See section 5.6 for further details.

(e) You must contact us if candidates need medical monitoring devices in the exam room.

Important information

The invigilator must report any problems with question paper security or exam conduct to the Head of Centre. The Head of Centre or Cambridge Associate must tell us about this straight away.

5.1.9 Starting the exam

An exam is in progress from the time the candidates enter the room until all the scripts have been collected.

- You must collect the blue question paper packets from the secure storage as close to the start of the exam as possible. Once these have been removed from secure storage they must not be left unattended at any time.
- When the candidates are seated, two members of staff must check they have **the correct blue question paper packet before opening it**.
- Before opening the packet, two staff members must check it is undamaged. They must also check the details on the label are correct. This includes checking the centre number, exam date, session, subject title, syllabus and component number are correct.
- When the blue question paper packet is opened, the front cover of the question paper will be visible through the transparent inner bag. Two members of staff must check again that the subject and component are correct. They should also check to make sure that the inner packet has not been opened and is undamaged before opening it.
- When these checks have been completed, the inner transparent bag can be opened and the question papers handed out to the candidates.
- If you find you do not have enough question papers, you must contact us immediately. If this is due to unauthorised entries and you do not have enough question papers, you should not allow the additional candidates to sit the exam. You must not photocopy, photograph or share any of the contents of the confidential exam material to make copies. This may be considered centre staff malpractice.
- If you have more than one room of candidates or a large number of candidates it may be easier to place the question papers facing upwards on the desks before the candidates enter the room. If you do this, do not leave question papers unattended at any time. You must make sure that candidates do not open the question paper until the invigilator says they can do this (see section 4.6).
- You must read out a set of instructions before candidates are allowed to start working. The instructions are in our What to Say to Candidates in an Exam document. You can download it from www.cambridgeinternational.org/examday. If you use your own script instead you must include the content of our document. You must read out all instructions in English. You can then repeat them in another language as long as the content and meaning are exactly the same.

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- Tell candidates to write their name, candidate number and centre number on any work they want to hand in. For listening tests, make sure candidates are given time to do this before the invigilator plays the audio file.
- You must tell candidates about any erratum notices.
- Unauthorised people who do not have a designated role in running the exam must not enter the exam room and must not have access to confidential materials in the exam room.

5.1.9.1 Opening the wrong question paper packet

If you open the wrong blue question paper packet by mistake, do not open the transparent inner bag and do not give the question papers to the candidates. Tell your Head of Centre and send us Exam Day – Form 11 straight away.

The Head of Centre must watch while you do the following:

- Do not reseal the blue packet. Take photographs of it.
- Put the opened blue packet in a large envelope.
- Write 'question papers', the syllabus and component code, and the date and time of the exam on the envelope.
- Seal the envelope.
- You must both sign over the seal to show you have witnessed the packet being resealed.
- Put a clear piece of tape over your signatures to protect them. Do not use masking tape.
- Take a photograph of the signatures and the new seal.
- Return the sealed envelope to secure storage.

On the form you must explain:

- why and how the packet was opened
- who opened it and when they opened it
- who has had access to the packet since it has been opened
- who has had access to the question paper since it has been opened.

Candidates may need Full Centre Supervision while you do this. You can then start the correct exam.

If you open the wrong blue question paper packet by mistake and then also open the transparent inner bag, you must follow the steps above.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Question Paper Packet Opened in Error: Exam Day – Form 11

5.1.10 Late arrivals

A candidate is a 'late arrival' if they arrive after one or both of the options below:

- after an exam has started
- after a period of Full Centre Supervision has started.

5.1.10.1 Candidate arrives late but before the Key Time

(a) You can decide whether to allow the candidate to take the exam. If they take it allow the full time.

(b) If the exam has already finished and other candidates who have taken the exam are under Full Centre Supervision, do not allow the late candidate to communicate with them.

(c) If you allow the candidate to take the exam you must follow our regulations in this section.

(d) If you do not allow the candidate to take the exam mark them as absent on the attendance register.

(e) You do not need to tell us about this late arrival.

5.1.10.2 Candidate arrives late, after the Key Time but during the exam or a period of Full Centre Supervision

(a) If the exam is still in progress, you can decide whether to allow the candidate to take the exam. If they take it allow the full time.

(b) If a candidate arrives late for a period of Full Centre Supervision before an exam, but it is after the Key Time, you can decide whether to allow them to take the exam. Do not allow them to communicate with candidates already under Full Centre Supervision. You must supervise the late candidate separately in line with our regulations. See the 'Key Times and Full Centre Supervision' section.

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(c) If you allow the candidate to take the exam you must follow our regulations in this section.

(d) If the candidate arrives after the Key Time and you allow them to take the exam you must tell them that:

- you are reporting their late arrival to us (as in section 5.1.10.2(e))
- we will mark their answer script
- we may not accept their script however, and they may get 'NO RESULT' in the syllabus.

If you allow the candidate to take the exam you must report this to us on the same day.

(e) To report the late arrival email Exam Day – Form 3 to info@cambridgeinternational.org. Include your centre number and 'Late Arrival' in the subject line. If you do not do this it may be malpractice. See section 5.6.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Late Arrivals: Exam Day – Form 3

5.1.10.3 Candidate arrives late, after the Key Time, after the exam has finished

(a) Do not allow the candidate to take the exam. Mark the candidate as absent on the attendance register.

(b) You do not need to tell us about this late arrival.

5.1.10.4 Candidate arrives late for a timetabled listening exam

Follow the relevant regulations in sections 5.1.10.1 to 5.1.10.3. If you decide to allow the candidate to sit the exam you must also do one of the following:

- Keep the candidate under Full Centre Supervision until the other candidates have finished the exam and left the room. Do not allow the late candidate to communicate with other candidates who have already taken the exam or who are under Full Centre Supervision. You must supervise the late candidate separately in line with our regulations. Please see the 'Key Times and Full Centre Supervision' section. You can then start the audio file from the beginning for the late candidate.
- If you have a spare audio file for the exam, the candidate can take the exam in a separate room with a separate invigilator. This room must meet our regulations in section 4.5.

5.1.10.5 Candidate arrives late for an assessment where we do not apply Key Time regulations (windowed exams) within the exam window

(a) You do not need to report late arrivals for windowed exams to us.

(b) You can decide whether to allow the late candidate to take the assessment or mark them as absent.

(c) For windowed speaking tests, if you allow the candidate to take the test, you must also follow the regulations in section 3.4.9.

Important information

If a candidate is not present at the start of an exam, you may want to contact their parents/guardians/carers to see if the candidate can attend. If they can, ask the parents/guardians/carers to supervise the candidate at all times. They must not communicate with anyone until a member of centre staff meets them.

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5.2 During the exam

5.2.1 Supervising the candidates

Invigilators must supervise the candidates throughout the whole exam and give full attention to this at all times. They must not read through any question papers. See section 4.6.

5.2.2 Practical exams

During a practical exam, candidates may need to move around and invigilators may need to tell them what to do. **NEW** Invigilators must limit this to what is essential and must not help or assist candidates with answers.

5.2.3 Leaving the room while the exam is in progress

If candidates need to use the washroom during the exam, they must be accompanied by a member of staff. This can be an invigilator as long as the ratio of invigilators to candidates is maintained.

If this happens during a timetabled listening component, you can allow the candidate to listen to the material they have missed after the other candidates have left. The candidate can only hear the material the same number of times as the other candidates.

If a candidate has finished their exam early and wants to leave the exam room and not return, the following regulations apply:

- Before any candidate leaves the exam room, you must collect their answer script and question paper. See section 5.3.1.
- Candidates can be allowed to leave the exam room but must be kept under Full Centre Supervision until the Key Time has passed. See section 5.3.2.
- After the Key Time the candidate can leave the exam room and does not need to be under Full Centre Supervision.

If you prefer you can keep the candidate in the exam room until the end of the exam but you must keep them under exam conditions. See section 5.3.2.

5.2.4 Irregular conduct

(a) Wherever possible, the invigilator must remove and keep any unauthorised materials they find in the exam.

(b) The Head of Centre must tell us as soon as possible if our regulations have not been followed. They can tell a candidate to leave the exam room, but only if it is essential or if the candidate would disrupt others. If you tell a candidate to leave the room you cannot apply for special consideration.

(c) A candidate may be disqualified if our regulations are not followed. Only we can decide this. See section 5.6.

5.2.5 Emergencies

In an emergency the safety of candidates and staff is the most important thing. If it is safe and practical, invigilators should do the following to keep the exam secure:

- If necessary evacuate the exam room.
- Fully supervise candidates so they cannot communicate with anyone or access information.
- Make sure all question papers and answer scripts are left in the exam room and that the room is secured.
- After the candidates have returned to the exam room and before the exam restarts, mark on the candidates' work where the interruption happened, if possible.
- Note the time and length of the interruption.
- Allow candidates the full working time for the exam.
- If there are only a small number of candidates, you could take them to another room to finish the exam. Also take the question papers and scripts.
- Send us a full report of the incident and what you did straight away by emailing info@cambridgeinternational.org with 'Exam Day Emergency – (centre number)' in the subject line.

5.2.6 Five-minute warning

You must tell candidates when there are five minutes of the exam left. The invigilator must read out the 'Five-minute warning' section from our What to Say to Candidates in an Exam document. You can download it from www.cambridgeinternational.org/examday. If you use your own script instead you must include the content of our document. You must read out all instructions in English.

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You can then repeat them in another language as long as the content and meaning are exactly the same.

In listening exams, you should give a five-minute warning if it does not disturb candidates.

Important information

Multiple-choice answer sheets for foreign language and English (as an additional language and as a second language) listening and reading exams

Candidates taking the following syllabuses and components will submit their answers on a multiple-choice answer sheet. They will not submit them on the question paper. This will include the listening and reading components for some syllabuses.

- Cambridge IGCSE:
  - English (as an Additional Language) (0472/01) and (9–1) (0772/01)
  - English as a Second Language (Speaking Endorsement) (0510/02) and (9–1) (0993/02)
  - English as a Second Language (0511/02) and (9–1) (0991/02)
  - French (0520/01) and (9–1) (7156/01)
  - German (0525/01) and (9–1) (7159/01)
  - Spanish (0530/01) and (9–1) (7160/01)
  - Italian (0535/01) and (9–1) (7164/01)
  - Arabic (0544/01)
  - Malay (0546/01)
  - Mandarin Chinese (0547/01).
- Cambridge IGCSE Core:
  - English as a Second Language (0465/02).
- Cambridge O Level:
  - French (5020/01)
  - German (5025/01)
  - Spanish (5030/01).

Important information (continued)

- Cambridge International AS Level:
  - Spanish (8022/01, 02)
  - **NEW** German Language (8027/01, 02)
  - **NEW** French Language (8028/01, 02)
  - Chinese Language (8238/01, 02).
- Cambridge International A Level:
  - Spanish Language & Literature (9844/01)
  - Chinese Language & Literature (9868/01)
  - **NEW** German Language & Literature (9897/01)
  - **NEW** French Language & Literature (9898/01).

Important: At the end of the listening test, candidates have six minutes to transfer their answers from the question paper onto the multiple-choice answer sheet.

There is more information about multiple-choice answer sheets on our website, including a sample which you can share with your teaching colleagues, candidates and invigilators so they know what to expect on exam day: www.cambridgeinternational.org/multiple-choice

For candidates taking Cambridge IGCSE Arabic (0544/01), the answer options on the question paper are listed from right to left on the page. However, the answer options on the generic multiple-choice answer sheet are listed from left to right. Make sure your candidates are aware of this before the exam, and that they understand how to complete the multiple-choice answer sheet correctly.

You should not return the question papers to us. The multiple-choice answer sheets must be returned in the script packet envelope provided. See section 5.4 for instructions on packing and sending scripts.

Where component '01' is mentioned, it includes all variants of component '01' where applicable. For example, 11, 12, 13.

Where component '02' is mentioned, it includes all variants of component '02' where applicable. For example, 21, 22, 23.

For more information and to see a sample multiple-choice answer sheet go to www.cambridgeinternational.org/multiple-choice

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5.3 At the end of the exam

At the end of the exam the invigilator should read out the 'Finishing the examination' section of our What to Say to Candidates in an Exam document. You can download it from www.cambridgeinternational.org/examday

If you want to use your own script instead you must make sure it includes the content of our document.

If candidates arrive late and the invigilator allows the full time to take the exam (see section 5.1.10), they should stop writing after the extra time.

5.3.1 The end of the exam

(a) Candidates must stay under exam conditions and in the exam room until the invigilator says they can leave.

(b) If an exam ends before the Key Time, you must keep candidates under Full Centre Supervision until the Key Time has passed. If a candidate does not attend a period of Full Centre Supervision you must tell us as it may be malpractice.

(c) You must collect all exam materials at the end of the exam. Before you allow candidates to leave the room, you must check that the number of question papers and any other exam material at the end of the exam matches the number handed out at the start.

(d) Use treasury tags or string to fasten together any continuation booklets or sheets of paper candidates want to hand in to be marked. Do not use staples or paper clips.

(e) Invigilators must:

- sort answer scripts into the order on the attendance register (candidate number order). **NEW** Scripts for absent candidates must not be included
- check they have all the answer scripts and that candidates have used correct centre and candidate numbers
- place answer scripts and any relevant access arrangement cover sheets in the script packet straight away and seal it in the exam room. The answer scripts must then immediately be given to the person responsible for sending them to us.

(f) If the same exam is taking place in different rooms, invigilators from the smaller rooms should place the scripts in an envelope. This does not need to be sealed. They should take the scripts to be collated with the scripts from the other rooms. Or, one invigilator can collect the scripts from the different rooms. The answer scripts must be sealed in the script packet in one of the exam rooms.

(g) You must store answer scripts in your secure storage until you send them to us.

(h) Answer scripts are confidential between us and the candidate. Nobody is allowed to read or photocopy them before you send them to us, unless we ask you to do this.

(i) Nobody is allowed to remove scripts from the exam room if they do not have permission. If this happens, you must email info@cambridgeinternational.org straight away. Warn the candidate that we may not accept their script.

5.3.2 The 24-hour security rule

Candidates must not remove any question papers or question paper content from the exam room. This includes writing questions on statements of entry, typing question content into calculators, etc. This is not a complete list. You must apply the 24-hour rule to keep question papers and their contents secure.

All unused question papers, answer booklets and any other confidential exam material must be stored in your approved secure storage until at least 24 hours after the end of the exam or Key Time, whichever is later. After this time you can dispose of the unused question papers or you can return them to candidates/centre staff if you want to.

You must store all empty question paper packets in your approved secure storage until you receive certificates. We may need them to investigate suspected malpractice.

Practical tests for Cambridge International AS & A Level Information Technology (9626) and Cambridge International AS & A Level Computer Science (9618)

You must collect all question papers at the end of the test. Store them securely until 24 hours after the end of the test window. After this time you can dispose of the question papers or you can return them to candidates/centre staff.

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Practical tests for Cambridge IGCSE ICT (0417) and Cambridge IGCSE ICT (9–1) (0983)

You must collect all question papers at the end of the test. Store them securely until 24 hours after the end of the test window. After this time you can dispose of the question papers or you can return them to candidates/centre staff.

Chk Question papers for Cambridge Primary Checkpoint, Lower Secondary Checkpoint and speaking tests

You must securely store all unused question papers for these exams until at least 24 hours after the end of the test window. After this time you can dispose of the unused question papers or you can return them to candidates/centre staff if you want to.

5.4 UK Packing and sending scripts

NEW It is essential that you send exam scripts to us as soon as possible after the exam has finished, preferably on the same day. This is to make sure that marking and grading is not delayed, and that we can release results on time.

- If you cannot return scripts on the same day (for example, because of a limited or restricted courier service), you must send them within the next five working days.
- If you do not send scripts back to us on the day of the exam, or within five working days after the exam, we consider them to be late. For late scripts, we cannot guarantee that results will be released on time. We may not accept late scripts and we may issue a 'NO RESULT' (X grade) on candidates' certificates.
- You must pack scripts using the correct packaging and bar-coded labels.
- Do not send any unused question papers, answer scripts or continuation booklets. If a candidate was absent, you must not send the unused script back to us.
- You must return your scripts at your cost using a reputable courier with a tracking facility. Use an express service to return scripts to us. Keep a record of the contents of each consignment you send, and the courier and tracking information. Only use air freight for very large consignments of scripts. If you do this, please contact Customer Services for instructions.
- You must complete our Script Return Form each time you send us scripts. We will email you a link to the form in the Cambridge Exams Officer eNewsletter. You can also find a link in the 'Help' section of our website.

Chk You must make sure Cambridge Primary Checkpoint and Lower Secondary Checkpoint scripts reach us by the deadlines in section 5.4.2.

Keep your scripts in your secure storage before sending them. Remember that candidates' answer scripts are confidential. Nobody should read or photocopy them before you send them to us.

If you have to store scripts before you send them to us, you must seal the packaging and store them under the same secure conditions as other confidential exam materials.

For packing and sending samples you have assessed, see section 3.6. For instructions on submitting Cambridge Global Perspectives work, see section 3.7.

We are changing the script packet return envelopes from plastic bags to brown paper bags. If you have plastic script packets left over from a previous series, you can still use these to return scripts to us. We have carried out rigorous testing with the paper bags to make sure that question papers are still secure in the new packaging. You must also follow the regulations in section 5.4.1.

5.4.1 Packing scripts

We provide materials for packing, labelling and sending scripts: attendance registers, script packets, bar-coded labels and courier labels.

Please follow these steps when packing scripts.

1 Invigilators need to complete and sign the attendance register. Add the details of any candidates not printed on the attendance register to the bottom. If you need a blank copy of an attendance register use Exam Day – Form 1.

2 Check each script against the attendance register to make sure there is a script for every candidate marked as present.

3 If a candidate has used a scribe, word processor, practical assistant or transcript, attach Exam Day – Form 4 to the front of the script using a treasury tag or string, not paper clips or staples. Download the cover sheets from www.cambridgeinternational.org/forms

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4 Place the scripts and the corresponding attendance register in a script packet. Do not put any other material in the script packet, except if you are including a cover sheet for one or more candidates (see point 3, above). To ask for special consideration use either the 'Special consideration' area of Direct or Exam Day – Form 7.

5 Pack the scripts for different components in separate packets so they match the syllabus and component number printed on the label. Seal the script packets and attach the correct bar-coded labels to each packet. These labels identify the contents of each script packet. They are in timetable date order with the labels for non-timetabled components printed first.

Remember:

- You will receive labels which are pre-printed with candidate number ranges. The scripts you include in each packet must match the candidate number range on the label you attach to the outside of each packet. Split the attendance register so it matches the scripts in each packet.
- If one packet is not large enough, you can use two or more. Put the bar-coded label on the first packet and number each of the packets (for example, 1 of 4, 2 of 4). Show the candidate number range on each packet. You do not need to split the attendance register. Place the register for the candidate range on the bar-coded label in the first packet. You can then tape the packets together that relate to the bar-coded label.
- You must never tape script packets together which contain different components.
- If you have lots of entries for an exam, you may receive more than one label. If you do, pack the scripts so they match the candidate number range on the label. Split the attendance register so it matches the candidate number range on the bar-coded label.
- Chk For each component of Cambridge Primary Checkpoint and Lower Secondary Checkpoint, you will receive one label for every 120 candidates. If you have more than 120 scripts, pack the first 120 scripts in one packet with the first label and the remaining scripts in another packet with the second label. Split the attendance register so it matches the scripts in each packet.
- If all the candidates for a component are absent, you still need to complete and enclose the attendance register in the script packet, attach the bar-coded label and return it to us.
- Do not use any bar-coded labels from earlier exam series.
- **Do not write anything on the bar-coded label** or cover it with tape, other labels or anything that would cover or damage the barcode.
- If you do not have a bar-coded label write the following information on the packet: centre number, syllabus number, component number, number of scripts and candidate number range. The script packets do not include a box for the candidate number range but it is helpful for the distribution centre if you include this information. Do not attach a bar-coded label **and** write details on the packet. You should only write on the packet if you **do not** have a bar-coded label. See www.cambridgeinternational.org/barcode-to-script for guidance on attaching bar-coded labels to script packets.

6 Place your packets in strong and suitable outer packaging:

- You can send script packets for a variety of components in the same outer packaging.
- As a precaution **do not send scripts for all the components of the same syllabus in the same outer packaging**.
- Make sure the contents are secure so they do not get lost or damaged.
- Each package must not weigh more than 15 kg.
- If you send several script packets for a variety of components together, please make sure that the packets are separate within the outer packaging and that all packets have the correct labels.

Important information

NEW You will submit work for Art & Design (0400, 0989, 6090 and 9479) via Submit for Assessment. You will no longer be able to submit hardcopy work for Art & Design. Return of Art and Design Work: Coursework and Moderation – Form 5 is no longer available to use. Check the samples database for the submission and completion deadlines for Art & Design.

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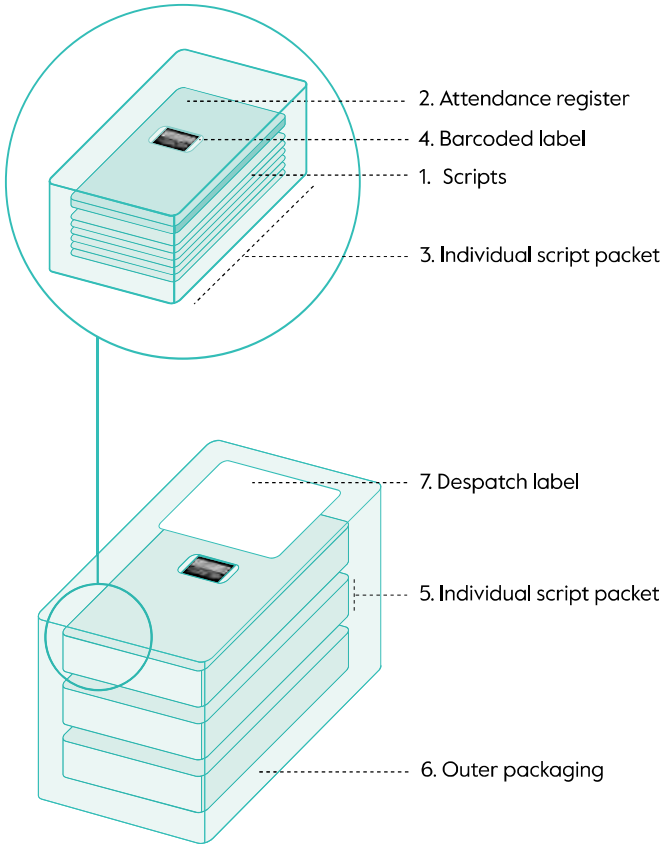
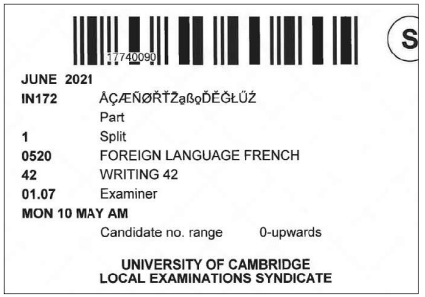
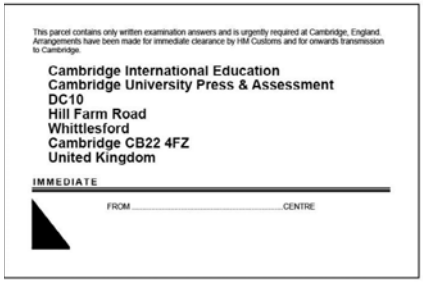
7 Attach the address labels provided in the pre-exam despatch to the outer packaging. You can download extra labels at www.cambridgeinternational.org/forms

If you do not receive labels and you cannot download them from our website, use the following address:

Cambridge International Education
Cambridge University Press & Assessment
DC10
Hill Farm Road
Whittlesford
Cambridge CB22 4FZ
United Kingdom







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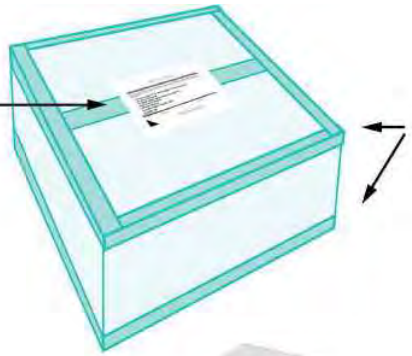
Use the despatch label provided.





Make sure corners are secure; use extra packing tape if necessary.



Do not send script packets without any outer packaging.



Make sure your outer packaging is secure.



Please make sure that your outer package does not weigh more than 15 kg.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Supplementary Attendance Register: Exam Day – Form 1
- Script Despatch Label: Exam Day – Label 1
- Access Arrangements Cover Sheet: Exam Day – Form 4

Form available from Direct

- Special Consideration: Exam Day – Form 7

Extra guidance

- Watch our 'Packing and despatching scripts' video at www.cambridgeinternational.org/examday
- If a candidate is unwell in the exam room or has a potentially contagious disease, go to www.cambridgeinternational.org/help and type 'soiled scripts' into the search box for advice.

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5.4.2 Sending scripts

A Cambridge Associates are responsible for sending scripts from their Associate Centres to us, using a courier. Cambridge Associates should make arrangements with their Associate Centres for receiving their scripts.

Important dates

Chk We must receive your Cambridge Primary Checkpoint and Lower Secondary Checkpoint scripts by the following dates:

- May series: 3 May 2025
- October series: 25 October 2025

5.5 Special consideration

Special consideration is a change we make to a candidate's mark after an exam. This will be because something unexpected and adverse happened to the candidate, for example temporary illness, injury or bereavement that had an impact on their ability to perform in the exam. It can only go some way towards helping a candidate whose exam performance might have been affected.

Special consideration cannot change the circumstances faced by the candidate. There will be situations where you should not enter a candidate for an exam because they are not in a fit state to cope with the assessment. We can only make minor adjustments to the mark awarded. To do more than this would jeopardise the assessment standard.

There are minimum requirements for special consideration:

- the candidate was affected at the time of the assessment
- the circumstances were outside of the candidate's control
- the candidate had been fully prepared for the exam and covered the whole course.

You should not apply for 'Candidate present for the assessment but disadvantaged' or 'Candidate absent for an acceptable reason' until after the exam. At this point you will be able to confirm how the candidate was affected by adverse circumstances, or the reason for their absence.

Our decision whether to award special consideration is based on various factors. These may vary from candidate to candidate and from one assessment to another. Read this section before you apply for special consideration.

Important information

Apply for special consideration no later than seven days after the last exam of the syllabus in the exam series affected.

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5.5.1 Special consideration principles

(a) We assess all candidates according to the same marking criteria so that grades and certificates are equally valid.

(b) We assess all candidates on what they know and can do, not on what they might have achieved if circumstances had been different.

(c) Special consideration must not give the candidate an advantage over other candidates.

(d) Special consideration must not affect the integrity of the assessment, and we will therefore restrict it in certain syllabuses.

(e) Centres are responsible for the conduct and administration of our assessments. Centre error is usually an unacceptable reason for special consideration; this includes, for example, making incorrect entries and providing incorrect exam timetables.

5.5.2 Candidate present for the assessment but disadvantaged

(a) We will normally give special consideration by applying a tariff (a small percentage of additional marks) to an affected component.

(b) The size of the tariff depends on the timing, nature and extent of the circumstances.

(c) We cannot apply special consideration cumulatively.

(d) We will not discuss how much special consideration should be given with centres, candidates or their parents/guardians.

5.5.3 Candidate absent from a timetabled component for acceptable reasons

(a) If a candidate is absent from a component for an acceptable reason, we may calculate and award an assessed mark for the missing component.

(b) In this case the minimum requirements for calculating an assessed grade are that the candidate must:

(i) have covered the whole course

(ii) have completed 50% of the total assessment by component weighting in the relevant exam series. Carry-forward marks do not count towards this.

(c) We cannot calculate an assessed mark for Cambridge International A Levels where a candidate has not completed any A Level components (A2 Level components) in the exam series.

(d) We cannot calculate an assessed mark for any component that does not have a weighting, e.g. some endorsed components.

(e) If a candidate is absent for a non-coursework test and has recovered before the end of the test date window, you must ask us if they can take it at another time within the test date window. Please see section 3.4.10.

(f) Where a candidate has a valid mark for a component that can be used, including carry-forward marks, we prioritise this over calculating an assessed mark based on the performance in other components of the syllabus.

5.5.4 Unacceptable reasons for special consideration

Candidates will not qualify for special consideration in the cases below. This list does not include every reason:

(a) long-term illness or other difficulties during the course that result in loss of teaching and/or revision time, unless the illness or circumstances are apparent at the time of the assessment

(b) bereavement more than six months before the assessment, unless there is an anniversary at the time of the assessment or there are on-going matters such as inquests or court cases

(c) matters at home such as moving house or taking holidays (including school/exchange visits and field trips) at the time of the assessment

(d) minor disturbance in the exam caused by candidates, such as bad behaviour and mobile phones

(e) candidates being disturbed by expected exam noise, e.g. other candidates writing or typing, the administration of another exam in the room

(f) the consequences of committing a crime or being charged with an offence. A retrospective application for special consideration may be considered if the charge is dropped or the candidate is found not guilty

(g) the consequences of taking alcohol or any other non-prescribed drugs

(h) the consequences of disobeying your internal regulations

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(i) not preparing candidates properly for the exam for any reason. See section 5.5.8(c)

(j) staff shortages, building work or lack of facilities

(k) misreading the instructions of the question papers and answering the wrong questions

(l) making personal arrangements that conflict with the exam timetable

(m) submitting no coursework at all, unless coursework is scheduled for a restricted period of time, rather than during the course

(n) not covering the course because the candidate joined part way through

(o) permanent disability, unless a change in condition further affects the candidate at the time of the assessment

(p) unless there is a good reason, not processing access arrangements, alternative venue arrangements and timetable deviations by the deadlines

(q) misreading the timetable and/or not attending at the right time and in the right place

(r) participating in local, national or international events, e.g. sport, conferences

(s) **NEW** failure of equipment where suitable precautions have not been put in place, including word processors/computers not connected to mains electricity and science practical equipment not checked prior to exams.

5.5.5 Shortfall in coursework

(a) Where a candidate has not produced enough coursework due to an unexpected illness or other misfortune, we may be able to accept a reduced amount. It will not be possible in every case, for example, if the candidate has not met the coursework assessment objectives, or the shortfall has been caused by an unacceptable reason. To be eligible for special consideration (shortfall in coursework) the candidate must have completed at least 50% of the coursework.

(b) If a candidate does not complete any coursework they will receive a 'NO RESULT' for that syllabus.

(c) You should contact us as soon as you become aware of the shortfall, so we can give you further guidance.

(d) When you apply, tell us how much of the coursework the candidate has completed overall and give a breakdown of marks across the assessment objectives. Candidates should always try to finish the coursework, and we will look at the remaining time the candidate has left to submit the coursework before we reply. We will not normally agree to accept less coursework beforehand.

(e) We will not give special consideration to allow for your individual teaching arrangements.

(f) **NEW** For PE coursework, adapted activities should be considered before applying for a shortfall. Contact us for guidance.

5.5.6 Lost or damaged coursework

(a) Where a candidate's work has been lost or damaged you must tell us as soon as possible. You must tell us what has happened and how.

(b) You must be able to prove that the work was done and that you monitored it.

(c) If you have recorded marks we will allow you to submit them as normal. If work was lost before you marked it, you must send any existing coursework for the candidates affected.

5.5.7 Coursework extensions

(a) You can apply for an extension to the deadline for submitting coursework marks and samples.

(b) Email info@cambridgeinternational.org along with the relevant evidence before the first coursework deadline.

5.5.8 Other situations where we may consider special consideration

(a) There may be complex cases that need special consideration. We may ask our assessment managers or senior examiner to decide how to award it. This means the results may not show the special consideration straight away.

(b) In cases that you could not predict or plan for, for example, earthquakes, war or epidemics, we may consider, at our discretion, accepting alternative forms of evidence of candidate attainment.

(c) Where a syllabus lists set works (e.g. set texts in a literature syllabus) and you have prepared candidates for the wrong work, special consideration may be given at our discretion. We will only consider cases where:

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- there is evidence candidates have been fully prepared for the assessment objectives in the syllabus
- the incorrect work studied was assessed in the previous year or is listed in the same syllabus booklet.

However, we will consider each application separately and there can be no guarantee that a candidate will receive special consideration where a centre has prepared candidates for the wrong work. The Head of Centre must make sure candidates are taught the correct works.

(d) **NEW** If exceptional and unforeseen circumstances that are beyond a candidate's control make it impossible for them to meet the regulations for their qualification, please contact us for further information.

5.5.9 Applying for special consideration

(a) You should use the 'Special consideration' area of Direct.

(b) You must only apply for special consideration if the Head of Centre fully supports it.

(c) You must be able to provide evidence to support your application if we ask to see it. You must keep this evidence until we publish results.

(d) You must submit applications within seven days of the last exam in the series of the syllabus affected. If you have been made aware of a candidate's circumstances after the seven days, please continue to submit the application for our review.

(e) We may not consider your application if you do not send us the right information.

(f) A friend or relative of the candidate should not produce the evidence to support special consideration applications. Where this is unavoidable, a senior member of centre staff must countersign and authorise the evidence. We can refuse evidence a friend or relative has produced.

(g) The Head of Centre or exams officer may attach a letter with the application to help explain any unusual circumstances.

(h) If you have used Direct you must check your account for the outcome.

(i) If you are unable to submit your application using Direct you can complete Exam Day – Form 7 and email it to info@cambridgeinternational.org. Include your centre number and 'Exam Day – Form 7' in the email subject line. We will tell you if your application is approved or rejected, but please note that it may take longer to get your outcome than using Direct.

(j) You must not submit duplicate applications.

Direct

Go to www.cambridgeinternational.org/direct, log in and go to the 'Special consideration' area.

You can submit applications for:

- candidates who were affected at the time of the assessment
- circumstances that were outside of the candidate's control
- candidates who had been fully prepared for the exam and covered the whole course
- coursework-related special consideration.

Important dates

Applications can be made in Direct from these dates:

- June series: 1 March 2025
- November series: 1 September 2025

Administrative forms

Forms available from the 'Support Materials' section of Direct:

- Special Consideration (Shortfall in Coursework): Coursework and Moderation – Form 2
- Special Consideration (Lost Coursework): Coursework and Moderation – Form 3
- Special Consideration: Exam Day – Form 7

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Extra guidance

Our guide to applying for special consideration online is in the 'Help' section of the 'Special consideration' area of Direct.

Cambridge Associates / Associate Centres

Associate Centres should apply for special consideration using Exam Day – Form 7 rather than Direct. They should download the form from the 'Support Materials' section of Direct and send it to their Cambridge Associate. The Cambridge Associate must check the form and email it to us within seven days of the last exam of the syllabus affected.

5.5.10 Appeals against special consideration decisions

To appeal against an outcome, please see section 7.4.

5.5.11 Chk Cambridge Primary and Lower Secondary Checkpoint

You cannot apply for any special consideration for Cambridge Primary and Lower Secondary Checkpoint candidates because the whole marking process is linked to the curriculum framework.

If a candidate does not sit a paper, the diagnostic feedback we send you will not include this candidate. We will not send their statement of achievement and report to student for this syllabus.

5.5.12 Honorary certificates

You may ask for an honorary certificate if a candidate:

- was entered but died before finishing the minimum amount of assessment
- was entered but is terminally ill and did not complete the minimum amount of assessment.

5.6 Malpractice

Malpractice is any action that breaks our regulations and potentially threatens the integrity of our exams and certificates. Malpractice can happen before, during or after timetabled exams or other assessments.

Malpractice can be:

- intentional and aim to give an unfair advantage in an exam or assessment
- caused by people being careless, forgetful or unaware of our regulations
- beyond anyone's control and be a result of circumstance.

A variety of people could be involved in malpractice, for example:

- candidates
- centre staff, for example, exams officers, teachers, invigilators, management, consultants and people who help with access arrangements
- other people, for example, the candidates' relatives or friends.

The Head of Centre must:

- make sure candidates and centre staff know their individual responsibilities as set out in our regulations
- tell us straight away about any potential malpractice they become aware of or that is reported to them.

5.6.1 Candidate malpractice

The following are examples of malpractice by candidates. This is not a complete list:

- bringing unauthorised materials into the exam room or accessing unauthorised materials during the exam. See section 5.1.8.2
- disruptive behaviour in the exam room (including talking or attempting to talk to other candidates and/or using offensive language)
- copying from another candidate
- collusion
- plagiarism: not giving sources and/or submitting another person's work as if it is their own
- looking for, getting, receiving, exchanging or passing on confidential or fake exam material in any way

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- not following an invigilator's instructions
- not following supervision rules designed to keep the exams secure
- stealing another person's work
- deliberately destroying another person's work
- including threatening, offensive or obscene material in scripts or coursework
- impersonation: pretending to be someone else, or arranging for another person to take their place in an exam
- altering, falsifying or misrepresenting any results information, including certificates
- behaving in a way that undermines the integrity of the exam.

5.6.2 Centre staff malpractice

The following are examples of malpractice by centre staff. This is not a complete list:

- not keeping exam material confidential
- not storing exam material securely
- not keeping candidates under Full Centre Supervision in relation to the Key Time
- not invigilating properly
- helping or prompting candidates with answers
- not keeping candidates' work confidential
- moving the session or date of a timetabled exam without telling us and getting our written permission
- helping candidates with coursework more than the regulations allow. See section 3.2 and individual syllabuses
- allowing candidates unsupervised access to coursework exemplar materials, whether this is the work of former candidates or material we have provided
- not keeping candidate computer files secure
- behaving in a way that undermines the integrity of the exam.

5.6.3 Suspected malpractice you discover

The Head of Centre must report any suspected malpractice to us on the same day or no later than 12:00, local time, the following working day. Use the relevant malpractice forms.

A The Head of Centre in an Associate Centre must report any suspected cases of malpractice to their Cambridge Associate straight away using the relevant malpractice forms. The Cambridge Associate should check the form and then send it to us straight away.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Notification of Suspected Centre Staff Malpractice: Exam Day – Form 9a
- Suspected Centre Staff Malpractice Report: Exam Day – Form 9b
- Suspected Candidate Malpractice Report: Exam Day – Form 9c
- NEW Suspected Candidate Malpractice Report: Exam Day – Form 9d

The Head of Centre must:

(a) Tell us straight away about suspected malpractice they become aware of or that is reported to them. If they do not do this it might be considered malpractice in itself.

(b) Report suspected malpractice with all relevant information including:

- statements from relevant centre staff, for example, the Head of Centre, exams officer, invigilators or teachers. Statements should include a detailed account of the circumstances and any investigation the Head of Centre has carried out
- statements from all candidates involved in the suspected malpractice, giving their account of events in their own words or confirmation that they do not want to give a statement
- evidence of any unauthorised material the candidate had, e.g. a photograph of the unauthorised material
- seating plans
- any other relevant evidence or information.

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(c) All statements must be in English. If the level of English of the person writing the statement is poor we may accept statements in other languages. You must provide a translation or we may not be able to accept the evidence.

(d) We take all reports of suspected malpractice seriously. We will write to let you know we have received your report. In our response we will do one of the following:
- confirm that you do not need to do anything further
- provide you with guidance
- open a suspected malpractice investigation.

5.6.4 NEW Plagiarism in coursework

We need to be confident that the work we assess is the candidate's own before we can award a grade. You are responsible for supervising candidates when they are completing coursework. You must also authenticate their work before you submit the marks.

If you discover plagiarism in a candidate's work during the course, you should resolve this internally. If you discover plagiarism when you come to submit work to us, you must not submit it. For help on preventing and identifying plagiarism, see www.cambridgeinternational.org/courseworkandmoderation

When submitting coursework, you sign a declaration confirming that the work is the candidate's own original work. This declaration includes confirmation that the candidate has been taught how to correctly reference, that they have appropriately referenced and acknowledged any content taken from another source, and that they understand we may consider it malpractice if they submit work containing plagiarised material. Once you submit coursework to us, we may use plagiarism detection software to screen it.

Our subject experts will review any coursework we suspect may contain plagiarism. If we find plagiarised work, we may consider it candidate malpractice and therefore not accept the work. The candidate may then receive no marks for that component. The declaration you sign when submitting the work is made on behalf of the candidate and their teacher. It confirms that the candidate's work is their own, and that the candidate has used referencing correctly. Therefore, we may not request statements from you before closing the malpractice case and deciding the outcome, which we share with your Head of Centre. You can still appeal the outcome through the appeals process as per section 7.3.

You should contact us if you are unsure whether to submit work or if you have any other queries.

5.6.5 Suspected malpractice investigations

(a) When we open a suspected malpractice investigation, we will write to you with the details, including actions and instructions. We will try to find all relevant information to help us decide whether malpractice has happened or not.

(b) You must complete all actions and cooperate with all instructions in the timescales we give.

(c) We oversee all investigations. We expect the Head of Centre to personally supervise and collect information for us.

(d) If you do not do what we ask in suspected malpractice investigations this might be considered malpractice in itself.

(e) We can withhold results during investigations. We will tell you if we do this.

(f) We can deal directly with the candidate or the candidate's representative. In these cases, we will tell the Head of Centre.

(g) We may extend an investigation if we have further concerns.

(h) We may send representatives to your centre to investigate.

(i) You must treat malpractice cases as confidential between your centre, the individuals involved and us.

(j) You must treat correspondence about suspected malpractice as confidential between your centre and us.

(k) The Head of Centre can share concerns and/or requests for information with the candidate(s) involved and their parents/guardians/carers.

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(l) If the Head of Centre is implicated in the suspected malpractice we may ask someone else to collect information, for example, the chair of governors or director of education.

(m) We may suspend your centre's ability to make entries while an investigation is ongoing.

(n) Candidates involved in a malpractice investigation cannot withdraw from the relevant syllabus.

5.6.6 Rights of individuals suspected of malpractice

If someone is suspected of malpractice the Head of Centre must tell them as soon as possible, preferably in writing.

We may tell the Head of Centre to share relevant evidence with them.

If someone is suspected of malpractice you must:

- tell them what they are accused of
- give them the opportunity to write a statement
- tell them the possible consequences if it is decided that malpractice has occurred
- tell them about our appeals procedure.

5.6.7 Making a decision

(a) We will look at all available information and use a balance of probabilities to decide whether the suspected malpractice has occurred or not.
NEW Available information may include candidate and centre staff statements, seating plans, exam timetables, supporting documents (such as copies of notes), information from our assessment specialists, and evidence from scripts, coursework, and/or multiple-choice answer sheets. This list is not exhaustive.

(b) We may consider mitigating factors supported by suitable evidence.

(c) We only base our decisions on the information we have and make no assumptions about the intended actions.

5.6.8 Outcomes

(a) All outcomes will be justifiable and reasonable.

(b) We may:

- take no further action
- give a warning to candidate(s) and/or the centre staff
- deduct marks or award no marks for a component
- disqualify candidates from the subject (in serious cases this may extend to all subjects taken in the series)
- ban a candidate from entering our exams for up to five years
- ban members of staff from any involvement in administering our exams for a specified period of time
- not allow your centre to make entries for specific exams
- remove your centre status and terminate our Agreement with you; see section A14.

(c) We can apply outcomes not listed above.

(d) If we decide malpractice has occurred but cannot decide who was responsible, we may not accept the work submitted and/or issue the relevant results.

(e) We will write to the Head of Centre with the outcome.

(f) When the Head of Centre has received our outcome they can decide whether to take further action with their candidate(s) and/or staff.

(g) Some outcomes will mean that components do not qualify for enquiries about results. We will confirm this in our outcome letter.

(h) We will do our best to make sure candidates are neither advantaged nor disadvantaged by centre staff malpractice. In some cases we may not be able to issue results.

(i) Centres should keep records of malpractice outcomes for future reference. Where appropriate, redacted versions of these should be shared with new members of staff, including centre leadership and management, and exam teams, such as a new Head of Centre or exams officer.

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5.6.9 Communicating outcomes to members of staff and candidates

The Head of Centre must tell the people concerned about the outcome(s). The Head of Centre is also responsible for telling them that we may share information as described in section 5.6.10.

5.6.10 Exchanging information with other awarding bodies and authorities

We will treat malpractice cases as confidential. However, where serious malpractice may affect the integrity of other awarding bodies' assessments we may exchange information with them or other regulators.

In cases of serious centre staff malpractice we can share information with professional organisations.

We can tell the relevant police authorities if there is suspected criminal activity. For example, cases involving theft, impersonation or falsifying documents.

5.6.11 Appeals

To appeal against a decision we have made in malpractice cases, please see section 7.3.

5.6.12 Allegations

If we receive a report of alleged malpractice we will look at any available information. This may lead to a suspected malpractice investigation.

We will only reveal the identity of the person making the allegation if we have to do this for legal reasons. During an investigation we will try to limit the risk of them being identified.

Extra guidance

For more information on making an allegation go to www.cambridgeinternational.org/whistleblowing

5.7 Special instructions for particular exams

This section gives regulations for specific subjects and qualifications. You should also check the relevant syllabus in case other regulations apply.

5.7.1 Science practical exams

5.7.1.1 Confidential instructions

We send confidential instructions for each syllabus once final entries have been submitted.

The supervisor should use them to prepare for the exam session. You must keep them secure at all times. The Head of Centre is responsible for making sure they remain confidential. Never discuss the instructions with another centre or allow any information to reach candidates.

Contact us or your Cambridge Associate if you have any questions. Never open any question paper packets before the exam.

5.7.1.2 Materials

We may supply some of the materials. Materials we supply will be clearly labelled and we will tell you how to use them in the confidential instructions. You must check materials and specimens we provide against the despatch list as soon as they arrive. Tell us straight away if there are any problems.

Open the packets containing perishable specimens (for example, enzymes for biological practical experiments) as soon as they arrive. Keep them in a refrigerator that only authorised people can access.

The Head of Centre and supervisor are responsible for the safe and confidential handling of all materials until they are used in the exam. No information about these materials must reach candidates.

After the exam, you must return all microscope slides to us, unless we say otherwise. In some cases we may allow you to keep materials and pay replacement costs, using the form enclosed with the materials.

We may charge you for the cost of materials you do not return in good condition.

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5.7.1.3 Seating arrangements

Candidates must be seated so that they cannot see the work of other candidates. The minimum distance that you must seat candidates is 1.25 metres away from each other. This distance is measured from the centre of one candidate's seat to the centre of another's.

If you need to seat candidates so that they are not all facing in the same direction, you must make sure that they cannot see each other's work. You can use screens between candidates to achieve this but may need to use additional invigilators to monitor candidates if their view of candidates will also be obstructed.

5.7.1.4 UK Large numbers of candidates

If you do not have enough equipment for all your candidates to take their practical exam at the same time, you may need to divide the candidates into smaller groups and have the candidates sit the practical exam one after the other. You need to carefully plan how to do this and you must apply for additional sittings by following the instructions in section 1.2.4.

You must also schedule the exams in line with our Key Time and Full Centre Supervision regulations; see our 'Key Times and Full Centre Supervision' section. You must schedule each sitting of the exam so that candidates who are not taking the exam at the Key Time are under Full Centre Supervision. Candidates who have taken the exam, and who are waiting for the Key Time, cannot be in the same Full Centre Supervision group as candidates who are still waiting to take the exam. Candidates who have taken the exam may leave at the Key Time. Candidates from earlier sittings must be under Full Centre Supervision until the Key Time and cannot mix with any group of candidates who are due to sit later sittings. Your supervision arrangements must follow the regulations in section 1.2.3.1.

Scheduling the groups of candidates in this way may cause a morning exam to overlap with the afternoon (PM) exam session. If this happens, do one or more of the following to make sure no candidate needs to be in two exams at the same time:

- Arrange the groups of candidates so that candidates who have an afternoon exam are in the first sitting of the practical exam in the morning.
- Timetable the practical exam so the changeover between groups of candidates is earlier than the Key Time. If you do this, you must keep any candidates who finish their practical exam before the Key Time under Full Centre Supervision.
- Delay the start of the afternoon exam (as long as all candidates taking the afternoon exam are under Full Centre Supervision at the Key Time).

Scheduling two or more groups of candidates to sit their practical exam in an afternoon session may cause the various sittings to overlap with a morning exam. If this happens, do one or more of the following to make sure that no candidate needs to be in two exams at the same time:

- Arrange the groups of candidates so that those who also have a morning exam are in the last sitting of the practical exam in the afternoon.
- Timetable the practical exam so the changeover between groups of candidates is later than the afternoon Key Time (you will need to supervise the second group of candidates before their exam).
- Make the start of the morning exam earlier (as long as all candidates are under Full Centre Supervision at the Key Time).

Please apply for additional sittings at least four weeks before the exam so that we have time to help you carefully plan.

5.7.1.5 Invigilation

In all practical exams, invigilators must make sure candidates do not communicate with each other, especially where they need to move from one part of the room to another.

You must have one invigilator for every 20 candidates and at least two invigilators in each laboratory. The supervisor who set up the room must be there at the start of the exam. They should also be available throughout the exam to deal with any technical problems or safety matters, and to help with invigilation. Ideally one of the invigilators should be a specialist in the subject being examined. This may be the supervisor if they are not performing the experiment at the same time as the candidates.

Where the supervisor needs to perform the experiments from the question paper during the exam, they should do this in a separate room where the candidates cannot see them. You must have enough invigilators while they do this.

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One of the invigilators left with the candidates must be qualified to deal with any technical problems or safety matters.

If the supervisor has been involved in preparing any of the candidates for the exam another invigilator must be there at all times. You must follow all our invigilation regulations.

Where candidates need to change between one set of apparatus and another, the supervisor must reset the equipment back to its original state each time, unless the confidential instructions say otherwise. The changeover time is in addition to the time for the exam. Invigilators must make sure candidates do not communicate with each other during the changeover.

The supervisor and any invigilators should include any forms we ask for in the instructions with the answer scripts.

If there are any problems during the practical that disadvantage the candidates, for example, the equipment is faulty, the supervisor should record it in their report. They should then talk to the exams officer about applying for special consideration.

5.7.2 UK Cambridge IGCSE, Cambridge O Level and Cambridge International AS & A Level listening exams

We supply the audio files for the listening exams. We are no longer providing CDs for these exams. See section 1.1.8 Global Listening for further guidance.

We strongly advise you to hold the listening exam in a room that is suitable for up to 30 candidates. If you have equipment that is very powerful, you may have more candidates in the room without asking us. However, if candidates cannot hear the recording you cannot apply for special consideration. Candidates can use headphones if you conduct the test in a language laboratory. However, they cannot control the recording. A member of staff must always control the recording, and follow the instructions on the recording. An invigilator should listen to the recording while it is played.

For Cambridge International AS & A Level Music (9483/01), candidates need equipment that allows them to control the recording, for example, a laptop with Windows Media Player, or other device for playing audio files. See our Global Listening administrative guide for information about which equipment to use to play audio files and how to play them securely during exams (www.cambridgeinternational.org/global-listening).

5.7.2.1 Checking recorded material

The candidates' subject teacher should not be the person who checks the sound quality of the audio file.

(a) As soon as you receive the audio file, you must listen to a small section to check the sound quality. For listening exams where the recording is controlled centrally, you must check each audio file. For exams where candidates control the recording, randomly check some of the audio files.

(b) You must check the acoustics and sound quality of the audio file at the right volume in the exam room one working day before the exam. You may use curtains or carpets to reduce echoes in the room. This check must not affect the security of the exam. Check that candidates with individual listening equipment can hear clearly.

(c) When doing the above checks do not listen to the exam material in full or remove it from the centre. After each check you must return the material to secure storage.

(d) If there is an issue with the exam material, use a different device to attempt the spot checks again. If the issue continues, end the spot checks and contact us immediately.

5.7.2.2 Conducting listening exams

Ideally, a member of staff who speaks the language of the listening exam should be there to deal with any technical problems. If this teacher prepared the candidates for the subject they must not be the only invigilator.

The invigilator must give candidates time to fill in information on the front cover, including their name and centre number, before playing the audio file.

The invigilator must not stop the audio file once started, unless there is an emergency. Noise from outside the exam room is not an emergency. The invigilator should warn candidates of this before the exam begins.

If the invigilator stops the exam because of an emergency, they should restart the audio file at exactly the same place once they have dealt with the emergency. The invigilator must include a report with the candidates' scripts, saying at which point in the exam the interruption took place, how long it lasted and what happened. If the invigilator is not sure whether all candidates heard certain items, they must say why and identify the items in the report.

Contact us if equipment fails during the exam.

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5.7.2.3 UK Large numbers of candidates

If you have more than 30 candidates sitting a listening exam, you may need to divide the candidates into smaller groups. If you cannot have the smaller groups sit the exam at the same time in different rooms, you must have the candidates sit the listening exam one after the other using additional sittings. You need to carefully plan how to do this and you must apply for additional sittings by following the instructions in section 1.2.4.

In all circumstances you must schedule the exams in line with our Key Time and Full Centre Supervision regulations; see our 'Key Times and Full Centre Supervision' section.

If you are approved to use additional sittings, you must schedule each sitting of the exam so that candidates who are not taking the exam at the Key Time are under Full Centre Supervision. Candidates who have taken the exam, and who are waiting for the Key Time, cannot be in the same Full Centre Supervision group as candidates who are still waiting to take the exam. Candidates who have taken the exam may leave at the Key Time. Candidates from earlier sittings must be under Full Centre Supervision until the Key Time and cannot mix with any group of candidates due to sit later sittings. Your supervision arrangements must follow the regulations in section 1.2.3.1.

Scheduling the groups of candidates in this way may cause a morning exam to overlap with the afternoon (PM) exam session. If this happens, do one or more of the following to make sure no candidate needs to be in two exams at the same time:

- Arrange the groups of candidates so that candidates who have an afternoon exam are in the first sitting of the listening exam in the morning.
- Timetable the listening exam so the changeover between groups of candidates is earlier than the Key Time. If you do this, you must keep any candidates who finish their listening exam before the Key Time in Full Centre Supervision.
- Delay the start of the afternoon exam (as long as all candidates taking the afternoon exam are under Full Centre Supervision at the Key Time).

Scheduling two or more groups of candidates to sit their listening exam in an afternoon session may cause the various sittings to overlap with a morning exam. If this happens, do one or more of the following to make sure that no candidate needs to be in two exams at the same time:

- Arrange the groups of candidates so that those who also have a morning exam are in the last sitting of the listening exam in the afternoon.
- Timetable the listening exam so the changeover between groups of candidates is later than the afternoon Key Time (you will need to supervise the second group of candidates before their exam).
- Make the start of the morning exam earlier (as long as all candidates are under Full Centre Supervision at the Key Time).

Please apply for additional sittings at least four weeks before the exam so that we have time to help you carefully plan.

5.7.2.4 Multiple-choice answer sheets for foreign language and English (as an additional language and as a second language) listening exams

Candidates sitting selected foreign language and English (as an additional language and as a second language) listening exams submit their answers on a multiple-choice answer sheet. They do not submit them on the question paper. At the end of the exam candidates have six minutes to transfer their answers from the question paper onto the multiple-choice answer sheet.

Please do not return the question papers to us. The multiple-choice answer sheets must be returned in the script packet envelope provided.

There is more information and a list of frequently asked questions on our website: www.cambridgeinternational.org/multiple-choice

5.7.3 Cambridge IGCSE 'open book' literature components

Candidates should take their set texts into the exam room for the following components:

- Cambridge IGCSE English Literature (0475 and (9–1) 0992) Paper 3
- Cambridge IGCSE Spanish Literature (0488) Paper 1.

Invigilators must make sure that candidates use original published books only, not photocopies. NEW If you are unable to find a set text that does not contain published on-page or page-facing notes, please contact us. Invigilators must make sure the texts do not contain notes, underlining, highlighting or anything else the candidate has added. Any breach of this regulation must be reported to us.

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5.7.4 Cambridge ICT and IT practical tests

This section applies to practical tests in:

- Cambridge IGCSE ICT (0417) and (9–1) (0983)
- Cambridge International AS & A Level Information Technology (9626)
- Cambridge International AS & A Level Computer Science (9618).

5.7.4.1 Timetabling

The final timetable gives a one-day window to conduct these practical tests. Wherever possible, candidates in your centre should take their test at the same time.

The Cambridge International AS & A Level Computer Science (9618) practical test will show in the final timetable as having a session assigned to it. This practical test can still be sat throughout a one-day window.

If you need more than one sitting they should follow on from each other within the same day. You must apply for additional sittings by following the instructions in section 1.2.4.

Candidates in different sittings should have no contact with each other. Candidates from the first sitting will need to be under Full Centre Supervision until the last group start their exam. Your supervision arrangements must also follow the regulations in section 1.2.3.1.2, including supervising candidates overnight if relevant.

You need to consider the time needed to set up the system and allow time in case anything unexpected happens.

5.7.4.2 Administration instructions

You must download instructions from phase 4 of the 'Exam administration' area of our website: www.cambridgeinternational.org/beforetheexams. We no longer upload the instructions to Digital File Despatch at the Key Time for the exam. They tell you about:

- preparing for the tests
- submitting candidates' work for marking
- handling any technical problems during the test.

You must read, understand and follow these instructions. If you do not have them email info@cambridgeinternational.org

(A) Cambridge Associates should give the relevant instructions to their Associate Centres.

Before the exam, you must check the date and time settings on all your computers are correct.

5.7.4.3 Supervisor

An experienced supervisor, who may be the candidates' teacher, is responsible for administering the practical tests. They are also responsible for preparing the hardware and software.

5.7.4.4 Invigilation

One invigilator must be present for every 20 candidates. There must always be at least one invigilator who has not been involved in the preparation of any of the candidates for the test.

In addition, a suitably experienced supervisor must be present in each test room to deal with any technical difficulties. The supervisor can have been involved in the preparation of candidates for the test. The supervisor must not be counted as an invigilator.

We encourage you to have an extra technician available, as well as the invigilators and supervisor.

You must follow all the invigilation instructions in this handbook and in the practical test instructions we send you.

Important information

You must report any system errors or problems in the Supervisor Report Folder (SRF).

5.7.4.5 Candidate access to equipment during the test

Candidates must use your equipment to complete the tests.

They must not have access to their own electronic files, personal notes, pre-prepared templates or other files. Candidates are not allowed to refer to textbooks or centre-prepared manuals. During the practical test they can use English or simple translation dictionaries, spellcheckers, software help facilities and manufacturer manuals on the software packages. They may use the original software supplier's wizards.

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Supervisors/invigilators must not give any other help to the candidates during the test, unless the equipment fails or malfunctions. If the supervisor gives any help during the test they must record this on the Supervisor's Report Form and send the form with the candidate's work.

5.7.4.6 Security issues

Candidates must not communicate with each other in any way and you must make sure their files are secure. They must not use a shared folder on your network to store the source files. You must use individual password-protected folders for each candidate for each practical exam. Give each candidate access to the folder at the start of the exam and remove access at the end. Candidates must not have access to portable storage media, for example, memory sticks. Invigilators must be vigilant throughout the test. Candidates must be under the same conditions as in sections 5.1 and 5.2.

You must treat all assessment material as confidential and must only issue it at the time of the test.

For Cambridge IGCSE ICT (0417), (9–1) (0983), Cambridge International AS & A Level Information Technology (9626) and AS & A Level Computer Science (9618) candidates must not have access to the internet and email during the practical test.

You must keep all work stored on a network or hard disk secure.

You must make sure that:

- candidates do not have access to test material, except during their test
- the invigilator collects all assessment material at the end of each session (including candidate-dated practical test papers and completed work). You can download instructions for conducting practical tests for syllabuses 9626, 9618, 0417 and 0983 from phase 4 of the 'Exam administration' area of our website: www.cambridgeinternational.org/beforetheexams
- you securely store a copy of all candidates' work until the end of the enquiry about results period in case we ask for it
- you destroy all draft copies and rough work that is not being submitted for marking
- you do not return the question paper with the candidates' work
- you keep all copies of the question paper under secure conditions until 24 hours after the end of the test window date.

Candidates must not keep any printouts they produce during the test. They must not keep any electronic files that form part of the test or that they have produced during it.

5.7.4.7 Software packages

Candidates can complete the practical sections using any software packages that allow them to show all skills listed in the relevant sections of each syllabus.

5.7.5 Cambridge International AS & A Level Media Studies

(a) You must spot-check the DVD extract as soon as you receive it.

(b) You must spot-check the sound and visual quality of the test material in the exam room one working day before the exam. This check must not affect the security of the exam.

(c) During the checks, do not watch the test material in full or remove it from the centre. After each check you must return the material to secure storage.

(d) If there is an issue with the exam material, use a different device to attempt the spot checks again. If the issue continues, end the spot checks and contact us immediately.

(e) You may transfer the test material from the DVD to a USB stick before the day of the exam, provided that this transfer does not affect the security of the exam. You must then return the material to secure storage. **NEW** Make sure the file is transferred in a secure environment (e.g. a private office) by the Head of Centre, or exams officer, in the presence of another senior member of staff. You should name the file with the date of the exam, the session, the syllabus and the component. You should use a strong password to protect the file, and a separate strong password to protect the USB stick. See section 4.3.1 for guidance about downloading confidential materials.

You should seal the USB stick in a tamperproof envelope or container and store it in secure storage. See section 4.4.2 for guidance about storing confidential materials.

5.7.6 Art & design exams

You should refer to the Guidance on the Administration and Online Submission of Art & Design for more information. See the syllabus pages of our website and the samples database.

5.7.6.1 Question papers

Question papers for art & design will be available from the School Support Hub and from Digital File Despatch. Make sure you download the correct question paper for your series.

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5.7.6.2 Invigilation

You must have one invigilator for every 30 candidates and at least two invigilators in the exam room. The art teacher or technician must not be the sole invigilator but should be available throughout the exam to deal with any technical problems.

You must supervise candidates' work during breaks. However, you do not need to supervise candidates during breaks. Candidates are not permitted to remove work or to bring work into the room once the exam has started.

Important information

NEW You will submit work for Art & Design (0400, 0989, 6090 and 9479) via Submit for Assessment. You will no longer be able to submit hardcopy work for Art & Design. Return of Art and Design Work: Coursework and Moderation – Form 5 is no longer available to use. Check the samples database for the submission and completion deadlines for Art & Design.

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Section 6: Results and certificates

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6.1 Releasing results

We release electronic statements of results online through Direct and shortly after results release we send your results despatch.

You can give candidates their results straight away or when you receive the printed statements of results in your results despatch. It is your responsibility to give candidates their results. This also includes giving them access to the Candidate Results Service or giving them their results another way.

We can still amend results published on electronic and printed statements of results if necessary.

We confirm final results when we send certificates.

A Cambridge Associates are responsible for giving results, statements of results and other results material to their Associate Centres.

PDC Important dates

- We tell you the exact dates and times we will release results on Direct and in the Cambridge Exams Officer eNewsletter.

June series (all qualifications)

- Results available online: August 2025
- Results despatch: late August 2025

November series (all qualifications)

- Results available online: January 2026
- Results despatch: late January to early February 2026

(Exact dates will be confirmed on our website and in the Cambridge Exams Officer eNewsletter.)

6.1.1 UK Online results

You can access your results from the Direct homepage and from the 'Administer Exams' dashboard. Online results are available in the following formats:

- statements of results for every candidate (PDF)
- results for your centre in broadsheet format (PDF)
- results for your centre in broadsheet format (Microsoft Excel)
- moderation report for teachers: a report on the moderation for each internally assessed component. It also shows where our moderators re-marked coursework because they could not moderate the marks.

6.1.2 Candidate Results Service



Candidates can use the Candidate Results Service to view their results electronically. This may be particularly useful if they have difficulties reading the printed results. You can control who has access to the site and what they can see through the 'Administer Exams' page on Direct.

For more information see section 6.2 and www.cambridgeinternational.org/results

You can generate login details once the previous series has closed:

- June series – late March
- November series – early October.

Important information

We can still amend results published on the electronic and printed statements of results. We confirm final results when we send out your certificates.

Candidates should not print screenshots of their results from the Candidate Results Service to share with educational institutions. If candidates need results to be shared with educational institutions they can use our priority results service; see section 6.2.

6.1.3 UK Results despatch

We usually send this despatch by courier. We do not email results to you or anybody else. A Associate Centres will receive their results according to their local arrangements.

When you receive your despatch check that you have all the documents listed below, in particular statements of results for all candidates, including private candidates.

Statements of results: for candidates

We send you a statement of results for every candidate. It lists all the syllabuses each candidate entered and the syllabus grades we have awarded. It also shows results for group awards, with the exception of candidates who have sat Cambridge IGCSE and/or Cambridge O Levels which have not counted towards the Cambridge ICE award. These results are printed on a separate statement of results.

We print statements of results on full-colour watermarked stationery. Notes explain the qualification and syllabus grades shown.

We do not show centre names on statements of results for private candidates.

We do not issue copies of statements of results if lost by the centre or candidate.

If you would like us to replace a statement of results send us Results and Certificates – Form 12. We charge a replacement fee for this.

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Candidates can view an electronic version of their statement of results using the Candidate Results Service, accessed through Direct.

See section 6.1.2. For more information see www.cambridgeinternational.org/results

UK Regulations

(a) You are responsible for giving all your candidates, including private candidates, their statements of results as soon as they arrive.

(b) Statements of results are not certificates. Universities or other organisations may not accept them.

(c) We can correct the information on any statement of results before we send certificates.

(d) The statement of results belongs to us and we issue it on the following conditions:

  (i) If a statement of results is altered or defaced it is invalid.

  (ii) The statement of results must be returned to us if we ask for it.

(e) When the statements of results arrive, you must check centre and candidate details on them, including the spelling of names and dates of birth.

(f) Contact us or your Cambridge Associate straight away if:

  (i) any of your statements of results have been altered or damaged

  (ii) any statements of results are missing.

(g) We do not usually give statements of results directly to candidates. In rare cases we may do this, once we have checked their identity.

Important information

As statements of results are a record of the exam, you must tell us straight away if there are any errors so we can correct the information we hold before we send your certificates. Use Results and Certificates – Form 12.

A Associate Centres must tell their Cambridge Associate about any errors.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Replacement Certificate Application: Results and Certificates – Form 12

PDQ Important dates

Tell us if any changes need to be made to personal information shown on printed statements of results by the following dates:

- June series: 22 September 2025
- November series: 26 February 2026

Results by syllabus, option and component: for teachers

This document shows all your results and component grades by syllabus, option and component. They let teachers compare a candidate's standard across different parts of a syllabus. They will not always exactly match the overall syllabus grade. You can share this information with candidates to help decide whether to retake a syllabus or apply for enquiries about results.

If you do this please tell them they should not share this information with anyone else. You can give component grade information if a university asks for it.

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Results broadsheet: for teachers

The results broadsheet is a summary of all the results for your candidates. It shows the results in a grid, with names listed down the left-hand side and syllabus titles across the top.

Moderation adjustment summary reports: for teachers

We provide a summary of moderation adjustments for every internally assessed component. The summary shows any changes we made to the marks your teachers awarded.

We do not change weighted marks. 'NO ADJUSTMENT' means that we accepted your marks. The information is in syllabus component code order.

If we changed ranges of marks we show them in ascending order. We do not reduce marks below zero or raise them above the maximum mark for the component.

6.1.4 Syllabus grades on results documents

The tables on the following pages show how we report syllabus grades on results documents. The syllabus grade is calculated from the candidate's marks and not directly from the component grades. So candidates with the same component grades will not necessarily receive the same syllabus grade.

'NO RESULT' or 'X' means one of the following:

- You told us the candidate was absent or withdrawn from one or more components of the syllabus. Therefore we cannot award a grade.
- You told us the candidate was absent or withdrawn and there is no record of their mark in one or more components of the syllabus. Therefore we cannot award a grade.
- We disqualified the candidate. If this happened we will have told you why.

'PENDING' or 'Q' means that we cannot issue a result at the moment but will do this soon.

6.1.5 UK Grade changes after results release

If a candidate's grade changes after results are released and the change is not because of an enquiry about results, we will update your statement of results and send you a printed copy. We will not automatically update the following results documents on Direct:

- statements of results for every candidate (PDF)
- results for your centre in broadsheet format (PDF)
- results for your centre in broadsheet format (Microsoft Excel).

If you need updated versions, email info@cambridgeinternational.org confirming which documents you need and the syllabus and series.

Qualification	Grade reporting
Cambridge IGCSE	• A*(a*), A(a), B(b), C(c), D(d), E(e), F(f) or G(g). A*(a*) is the highest grade and G(g) the lowest. • 'UNGRADED' shows that the candidate did not reach the standard required for Grade G(g). • For some Cambridge IGCSE syllabuses we report separate oral endorsement grades on a scale of 1(ONE) to 5(FIVE). 1(ONE) is the highest grade and 5(FIVE) the lowest. • Candidates who do not reach the standard required for Grade 5(FIVE) will have nothing reported on the statements of results.
Cambridge IGCSE (9–1)	• 9(NINE), 8(EIGHT), 7(SEVEN), 6(SIX), 5(FIVE), 4(FOUR), 3(THREE), 2(TWO) or 1(ONE). 9(NINE) is the highest grade and 1(ONE) the lowest. • 'UNGRADED' shows that the candidate did not reach the standard required for Grade 1(ONE).

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Qualification	Grade reporting
Cambridge IGCSE (9–1) First Language English (0990) and Cambridge IGCSE (9–1) English as a Second Language (Speaking Endorsement) (0993)	• For Cambridge IGCSE First Language English Speaking & Listening (0990/04) and Cambridge IGCSE (9–1) English as a Second Language (Speaking Endorsement) (0993/03), we report separate oral endorsement grades as Distinction, Merit or Pass. Distinction is the highest grade and Pass the lowest. They are reported as follows on statements of results: – with Distinction in Speaking & Listening (0990/04), Speaking (0993/03) – with Merit in Speaking & Listening (0990/04), Speaking (0993/03) – with Pass in Speaking & Listening (0990/04), Speaking (0993/03). • Candidates who do not reach the standard required for 'Pass' will have 'Unclassified' reported on their statements of results.

Qualification	Grade reporting
Cambridge ICE group award	• Cambridge ICE statements of results are issued to candidates who have entered for Cambridge ICE. • Distinction, Merit or Pass are awarded to candidates who meet the requirements of Cambridge ICE. • The statement of results shows the Cambridge ICE outcome and the individual syllabus results for Cambridge IGCSE and Cambridge O Level syllabuses. It does not include results for candidates who have sat Cambridge IGCSE and/or Cambridge O Levels which have not counted towards the Cambridge ICE award. These results are printed on a separate statement of results. • Only individual syllabus results for the final series are reported on statements of results. Therefore if a candidate is taking Cambridge ICE over more than one series, not all of the counting syllabuses are shown. • You will find details of the award rules for the Cambridge ICE group award in the Cambridge Guide to Making Entries.
Cambridge O Level (referred to as GCE O Level on statements of results)	• A*(a*), A(a), B(b), C(c), D(d) or E(e). A*(a*) is the highest grade and E(e) the lowest. • 'UNGRADED' shows that the candidate did not reach the standard required for Grade E(e).
Cambridge O Level syllabuses in languages other than English	• Performance in speaking tests (compulsory or optional) is reported on the statements of results below the syllabus grade as: 'with Pass in Oral'. • If a candidate does not achieve a 'Pass' in the speaking test or does not take the speaking test it will not show on their statement of results or certificate.

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Qualification	Grade reporting
Cambridge International AS Level (referred to as GCE AS Level on statements of results)	• a(a), b(b), c(c), d(d) or e(e). a(a) is the highest grade and e(e) the lowest. • 'UNGRADED' shows that the candidate did not reach the standard required for Grade e(e).
Cambridge International A Level (referred to as GCE A Level on statements of results)	• A*(a*), A(a), B(b), C(c), D(d) or E(e). A*(a*) is the highest grade and E(e) the lowest. • 'UNGRADED' shows that the candidate did not reach the standard required for Grade E(e). • In some Advanced Level syllabuses, if a candidate did not reach the standard required for Grade E(e) we will award an AS (Advanced Subsidiary) Level Grade a(a), b(b), c(c), d(d) or e(e), if their performance is good enough in the relevant components. This is called a Compensatory Cambridge International AS Level.
Cambridge International AS & A Level syllabuses in languages other than English	• We report speaking test (compulsory or optional) performance on statements of results under the syllabus grade as either Distinction, Merit or Pass. Distinction is the highest grade and Pass the lowest. They are reported as follows on statements of results: – with Distinction in Speaking – with Merit in Speaking – with Pass in Speaking. • If a candidate does not reach the standard required for 'Pass' in speaking or does not take the speaking test, it will not show on their statement of results or certificate.

Qualification	Grade reporting
Cambridge AICE Diploma group award	• Cambridge AICE Diploma statements of results are issued to candidates who have entered for the Cambridge AICE Diploma. • Distinction, Merit or Pass will be awarded to candidates who meet the requirements of the Cambridge AICE Diploma. The total points scored will also be shown. – Distinction is awarded if a candidate achieves a point score of 360 to 420 points. – Merit is awarded if a candidate achieves a point score of 250 to 359 points. – Pass is awarded if a candidate achieves a point score of 140 to 249 points. • We allocate points to each potential counting syllabus according to the grade achieved. • An asterisk (*) appears next to the syllabuses we have used for the award. • Only individual syllabus results for the final series are reported on statements of results. Therefore if a candidate is taking the Cambridge AICE Diploma over more than one series, not all of the counting syllabuses are shown. • 'Fail' shows that the candidate did not reach the standard required for the Cambridge AICE Diploma. The total points scored will not be shown. • The candidate will also receive a certificate showing the grades achieved in Cambridge International AS & A Level syllabuses. • You will find details of the award rules for the Cambridge AICE Diploma in the Cambridge Guide to Making Entries.

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Qualification	Grade reporting
Cambridge International Project Qualification	• A*(a*), A(a), B(b), C(c), D(d) or E(e). A*(a*) is the highest grade and E(e) the lowest. • UNGRADED shows that the candidate did not reach the standard required for Grade E(e).

6.2 UK PDQ Priority results

Many students have deadlines for submitting results to educational institutions around the world. We know that some deadlines are very close to our results release dates. Candidates can ask us to send a priority statement of results directly to their chosen educational institutions or employers on the day results are released. These results will arrive on the same day or shortly after results release.

Candidates who have applied to UK universities via the Universities and Colleges Admissions Service (UCAS) do not need to request priority results if they have taken Cambridge International AS & A Level exams.

We send all Cambridge International AS & A Level results to UCAS in time to meet university deadlines.

Chk We do not offer priority results for Cambridge Primary and Lower Secondary Checkpoint.

6.2.1 Applying for priority results

To apply, the candidate or the centre where they took the exam(s) must send us Results and Certificates – Form 9 by the dates shown on the next page.

This service can be paid for by card payment or invoice. The fees are in our fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge International School – registered as online, we send the fees list to you.

Regulations

(a) If we are sending the statement directly to a school or university you do not need to send us a letter of authorisation. However, if the candidate wants us to send a copy of their results to another address you must send a letter of authorisation on headed paper with the form. If a candidate applies to us directly they must also send a letter of authorisation.

(b) Requests to send results to third parties are considered on a case by case basis. We may ask for proof of the third party's identity and address.

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Important dates

We must receive all applications for priority results by:

- June series: 25 July 2025
- November series: 19 December 2025

We can accept late requests until we publish results. However, we may not be able to send the statement of results on the day we publish results.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Priority Results Application: Results and Certificates – Form 9

6.3 UK Enquiries about results

We carry out extensive quality checks before we issue results. However, you can submit enquiries about results if you would like us to check the results for particular candidates.

We offer a range of services depending on the type of check you would like; these are detailed below. For information about fees, see section 6.3.5.

Chk We do not offer enquiries about results services for Cambridge Primary and Lower Secondary Checkpoint.

6.3.1 UK PDQ Enquiries about results services

Service name	Details of service	Availability of service
Clerical re-check: Service 1	This service checks that all parts of the script were marked, and that the marks were totalled and recorded correctly.	Available for components we have assessed.
Clerical re-check with copy of script: Service 1S	The same as 'Service 1' but you also receive a copy of the script.	Available for components we have assessed.

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Service name	Details of service	Availability of service
Review of marking: Service 2	A review of the original marking to check that the mark scheme was applied correctly. Also includes the re-checks in Service 1. In this context, the 'original marking' means the marking used to determine the candidate's provisional result. This is often, but not always, the marking of the first examiner to mark the script.	Available for components we have assessed. Not available for multiple-choice question papers.
Review of marking with copy of script: Service 2S	The same as 'Service 2' but you also receive a copy of the script.	Available for components we have assessed. Not available for multiple-choice question papers.
Re-moderation of internally assessed component with report: Service 5	A re-moderation of a component you have assessed, and a report on how you assessed it. If you have submitted a different enquiry for any of the candidates in the group we will finish that enquiry before we produce the report.	Available for components you have assessed. Not available for individual candidates. We will only re-moderate the work of the candidates in the original sample.

Service name	Details of service	Availability of service
Report on the work of a group of candidates: Service 9	A report on the work of a group of 5 to 15 candidates for a component we have assessed. We do not review any marking. The report is designed to give teachers a better understanding of their candidates' performance in a particular component. You cannot use the reports to decide about retake entries. We process enquiries in the order that we receive them. If you submit a different enquiry for any candidates in the group after the Service 9 submission, the enquiry status will show as 'pending'. Once the Service 9 enquiry is completed and the report uploaded to Direct, we will process the 'pending' enquiries and change their status. We advise you submit all other services first before submitting a Service 9.	Available for components we have assessed. Not available for multiple-choice question papers.

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Group awards

Recalculation of Cambridge ICE or the Cambridge AICE Diploma	A recalculation to make sure the results for Cambridge ICE or the Cambridge AICE Diploma are correct. Email info@cambridgeinternational.org to ask for this. Do not use Direct.

NO RESULT (X Grade) or PENDING (Q Grade)

We usually issue a 'NO RESULT' if we think the candidate has not completed all the components of an assessment. 'PENDING' means we cannot issue a result at the moment but will do this soon.

If the Head of Centre asks us, we can explain 'NO RESULT' or 'PENDING' outcomes free of charge.

We will ask you to send us any evidence that shows our records may be wrong, for example, an attendance register or a coursework mark.

If we say that we cannot issue a result we will:

- confirm which component(s) we have no mark for
- explain again why we cannot award a result, for example, that we did not receive documents, coursework marks or information to confirm that the candidate did or did not take a particular exam.

UK If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025 for information about access to scripts.

6.3.2 How to submit an enquiry about results

Submit enquiries about results online through Direct. For detailed instructions, read our step-by-step guide and watch our video tutorial at www.cambridgeinternational.org/ear

To submit an enquiry for 'NO RESULT' or 'PENDING' outcomes, visit the 'Administer Exams' section of Direct and click on the 'Enquiries about results' tab. Click on the 'NO RESULT (X Grade)/PENDING (Q Grade)' tab and follow the same process as you would for submitting an enquiry about results.

We will email any further information to you.

A Associate Centres should submit enquiries about results to their Cambridge Associate through Direct. Cambridge Associates can then approve the enquiry and send it to us or reject it.

If you want to make amendments to an enquiry or cancel an enquiry, you must do this within 24 hours of your enquiry being acknowledged. We will charge an administration fee for any changes after this time. If the enquiry has been completed, we will be unable to cancel any changes to the candidate's result.

Important dates

UK PDQ The deadlines for submitting enquiries about results, including enquiries about 'NO RESULT' or 'PENDING' outcomes, are:

- June series: 20 September 2025
- November series: 26 February 2026

We cannot accept requests submitted after the deadlines because we start to dispose of candidate scripts shortly after these dates.

A It is good practice for Cambridge Associates to submit enquiries about results for all their Associate Centres before the closing date. This gives time to check them and resolve any problems before the deadline. Cambridge Associates may set earlier deadlines for their Associate Centres.

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Regulations

(a) The Head of Centre must support all requests.

(b) You must submit enquiries as soon as possible after we have issued results and before the deadlines.

(c) We will not consider:

(i) any telephone requests, including enquiries for 'NO RESULT' or 'PENDING' outcomes. You must submit them through Direct

(ii) some requests involving component(s) where malpractice is confirmed. We will confirm this in your malpractice outcome letter

(iii) any requests from candidates or their parents/guardians/carers

(iv) any requests for a component where we have calculated the component mark.

(d) You can only submit enquiries at component level.

(e) You can submit different services for different candidates in the same syllabus.

(f) You can submit the same or different services for the same candidate in different syllabuses.

(g) You cannot request multiple services for the same candidate for one syllabus.

(h) You must submit all the component enquiries for a candidate at the same time. We cannot accept extra enquiries for the same candidate and syllabus at a later date.

(i) For clerical re-check or review of marking services, you may only select one type of review or re-check service. For example, you cannot ask for a Service 1S for one component and then a Service 2S for another component if they are in the same syllabus.

(j) As well as enquiries for components we have assessed, you may also submit a Service 5 enquiry for any components you have assessed in the same syllabus.

6.3.3 UK How long does it take to process enquiries?

We deal with enquiries in the order we receive them. We normally tell you the outcome of your enquiry within 30 days of receiving it.

If a candidate wants to retake in the next exam series, we cannot guarantee that the outcome will be ready in time to help them prepare for the exam.

If a candidate's grade goes up as a result of an enquiry about results, and you have already entered them to retake the exam, we will credit your centre's account with the entry fee if you want to withdraw them. Please email info@cambridgeinternational.org with details of your candidate and the syllabus. When we have approved your request to credit your centre's account with the entry fee, we will withdraw the candidate and credit your centre's account.

We process Service 9 requests in the order we receive them. If you have submitted a Service 9 enquiry for candidates with other existing enquiries, the status for the Service 9 enquiry will display as 'Pending'. Once the existing enquiries are complete, the status for the Service 9 enquiry will change to 'Submitted'.

The enquiry will not display as 'Completed' on Direct until we upload the report. This may take longer than our normal 30-day turnaround. We cannot say when we will complete Service 9 reports so you cannot use them to decide about retake exams.

6.3.4 Outcomes of enquiries about results

Enquiries about results: Once we have received the enquiry we will upload an acknowledgement letter to the 'Enquiries about results' section of Direct.

We will email you when this letter is available. Please call Customer Services if it is not available 48 hours after you have submitted the enquiry.

We will upload the outcome of your enquiry and any copies of scripts and reports to the 'Enquiries about results' section of Direct. We will email you when they are available.

'NO RESULT' and 'PENDING' enquiries: Once we have received the enquiry we will acknowledge it or email you an outcome within seven working days. Please be aware that the status of your submitted 'NO RESULT' or 'PENDING' enquiry will not update in the 'Enquiries about results' section of Direct.

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Regulations

If a reviewing examiner proposes a change in the candidate's mark at the enquiry about results stage, this may or may not lead to a change in the candidate's mark. Mark changes will be made in line with any pre-established marking tolerance. Find out more about tolerance on our 'Enquiries about results' webpage: www.cambridgeinternational.org/ear

(a) UK If an enquiry leads to a change in the candidate's mark for a component (their mark may go up or down), their syllabus grade will either stay the same or go up and their percentage uniform mark may go up or down.

(b) UK Where an enquiry does not lead to a syllabus grade change, but does lead to a component grade change, we will not reissue any results documents unless you ask us to by emailing info@cambridgeinternational.org

(c) Where an enquiry leads to a candidate's mark going down and that mark is carried forward to a later series, we will use the reduced mark to calculate the candidate's grade in that series.

(d) Where an enquiry leads to a change to a candidate's syllabus grade, we will:

(i) write to you straight away

(ii) issue a revised statement of results

(iii) tell UCAS (the UK organisation that processes applications to higher education), and any other universities that have asked for a similar arrangement (Level 3 qualifications only)

(iv) write to any other university or institution to confirm the grade change if the Head of Centre or Cambridge Associate asks us to

Regulations (continued)

(v) not charge all or part of the fee. See section 6.3.5

(vi) delay sending certificates for any candidate(s) where an enquiry about results outcome is still pending.

(e) You must tell the candidate the outcome.

(f) Very rarely the outcome of an enquiry may mean we need to check the results for other candidates in that syllabus. If this happens we will tell the Head of Centre/Cambridge Associate. We will then carry out the service on any other candidates who may have been affected free of charge. We will tell the Head of Centre/Cambridge Associate the outcome.

6.3.4.1 UK Using photocopied scripts

For Services 1S and 2S, we upload copies of scripts to the 'Enquiries about results' section of Direct.

Regulations

Only teachers at your centre can see the copies of scripts we return. They can decide whether to return them to the relevant candidates. Scripts belong to us. If teachers want to use a script as an example to other students they must ask for the candidate's permission. If they cannot do this they must remove the candidate's name from the script before showing it to other students and make sure the student cannot be identified.

6.3.5 Fees

(a) We charge for enquiries about results. The fees for each service are in our fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge International School – registered as online, we send the fees list to you.

We invoice the Head of Centre for any enquiries about results. We will invoice you six to eight weeks after the deadline for submitting new enquiries.

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(b) We will not charge all or part of the fee if the enquiry leads to a change to the syllabus grade.

(c) For Service 5 requests we will not charge the whole or part of the fee if a syllabus grade changes as a result of an enquiry.

(d) We explain 'NO RESULT' and 'PENDING' outcomes free of charge.

6.3.6 Appeals

To appeal against the outcome of an enquiry about results, see section 7.2.

6.4 Certificates

Subject to regulation 6.4.7, a Cambridge certificate records and confirms a candidate's final results. A certificate is separate from a statement of results. Until certificates are issued, we reserve the right to change a candidate's results.

We send certificates after the deadline for enquiries about results so you have time to query your results.

We send certificates by courier. A We send Associate Centres' certificates to their Cambridge Associate.

The name of the centre is not shown on certificates for private candidates.

PDC Important dates

You will receive your certificates by the following dates. Contact us if you do not receive them.

- June series: end of October 2025
- November series: end of March 2026

If an enquiry about results is still open when we send certificates, the candidate(s) involved will receive their certificates when the enquiry is closed.

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Regulations

(a) Certificates belong to Cambridge University Press & Assessment, of which Cambridge International Education is a part. The following conditions apply:

(i) If the certificate is altered or defaced it is invalid.

(ii) You must return a certificate if we ask you to.

(iii) The certificate should be kept in a safe place.

(iv) We will not issue copies of certificates.

(b) You must check your certificates carefully when they arrive and contact us straight away if any are damaged or missing.

(c) If any information on certificates needs to be changed, for example, the candidate's name is incorrect, follow the instructions in section 6.4.2.

(d) You must store certificates in a secure place until you give them to candidates.

(e) You are responsible for giving all your candidates, including private candidates, their certificates as soon as you can. If you cannot give a certificate to a candidate personally, ask them to let you know when they receive it.

(f) A Cambridge Associates are responsible for sending certificates to their Associate Centres. They must contact us if any are missing or incorrect.

(g) You must keep unclaimed certificates in a safe place for at least 12 months from the date we issue them. After that period, you must return them to the address below with a list of the certificates you are returning. Keep a copy of this list. Never destroy unclaimed certificates.

Cambridge International Education
Shaftesbury Road
Cambridge
CB2 8EA
United Kingdom

(h) You must not copy Cambridge certificates in any form.

6.4.1 What is reported on certificates?

We report results in individual subjects using the grades in the tables on the following pages.

Qualification	Grades shown on certificate
Cambridge IGCSE	• A*(a*), A(a), B(b), C(c), D(d), E(e), F(f) or G(g). • A*(a*) is the highest grade and G(g) the lowest. • We do not report performances below the standard of Grade G(g) on certificates. • Candidates awarded Grades A*(a*), A(a), B(b), C(c), D(d), E(e), F(f) or G(g) have reached standards at least equivalent to the same grades in the General Certificate of Secondary Education (GCSE). Candidates awarded A*(a*), A(a), B(b), C(c), D(d) or E(e) have reached standards at least equivalent to the same grades in the Cambridge O Level.

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Qualification	Grades shown on certificate
Cambridge IGCSE language syllabuses	• For some language syllabuses we report separate oral endorsement grades on a scale of 1(ONE) to 5(FIVE). 1(ONE) is the highest grade and 5(FIVE) the lowest.
Cambridge IGCSE (9–1)	• 9(NINE), 8(EIGHT), 7(SEVEN), 6(SIX), 5(FIVE), 4(FOUR), 3(THREE), 2(TWO) or 1(ONE). 9(NINE) is the highest grade and 1(ONE) the lowest. • We do not report performances below the standard of Grade 1(ONE) on certificates. • Candidates awarded Grades 9(NINE), 8(EIGHT), 7(SEVEN), 6(SIX), 5(FIVE), 4(FOUR), 3(THREE), 2(TWO) or 1(ONE) have reached standards at least equivalent to the same grades in the General Certificate of Secondary Education (GCSE).
Cambridge IGCSE (9–1) First Language English (0990) and Cambridge IGCSE (9–1) English as a Second Language (Speaking Endorsement) (0993)	• For Cambridge IGCSE First Language English Speaking & Listening (0990/04) and Cambridge IGCSE (9–1) English as a Second Language (Speaking Endorsement) (0993/03), we report separate oral endorsement grades as Distinction, Merit or Pass, Distinction being the highest and Pass being the lowest. They are reported as follows: – with Distinction in Speaking & Listening (0990/04), Speaking (0993/03) – with Merit in Speaking & Listening (0990/04), Speaking (0993/03) – with Pass in Speaking & Listening (0990/04), Speaking (0993/03). • We do not report performances below the standard required for 'Pass' on certificates.

Qualification	Grades shown on certificate
Cambridge International Certificate of Education (Cambridge ICE)	• Distinction is awarded if a candidate achieves a Grade A(a) or above in five syllabuses and Grade C(c) or above in two more syllabuses. • Merit is awarded if a candidate achieves a Grade C(c) or above in five syllabuses and Grade F(f) or above in two more syllabuses. • Pass is awarded if a candidate achieves a Grade G(g) or above in seven syllabuses. • If a candidate does not achieve Cambridge ICE but gets a minimum of at least one Grade G(g) in a syllabus we award a Cambridge IGCSE certificate. • If a candidate achieves Cambridge ICE in one series they will receive separate Cambridge IGCSE and Cambridge ICE certificates. • If a candidate achieves Cambridge ICE over two series they will receive a certificate for the individual syllabuses they take at the end of the first series. They will receive separate Cambridge IGCSE and Cambridge ICE certificates at the end of the second series.
Cambridge O Level (referred to as GCE O Level on certificates)	• A*(a*), A(a), B(b), C(c), D(d) or E(e). • A*(a*) is the highest grade and E(e) the lowest. • We do not report performances below the standard of Grade E(e) on certificates. • The text 'Ordinary Level' before the grade awarded shows the level the grade was awarded at for the subject. • One certificate is awarded for Cambridge O Level, Cambridge International AS Level and Cambridge International A Level.

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Qualification	Grades shown on certificate
Cambridge O Level language syllabuses	• For some language syllabuses we report separate oral endorsement grades on a scale of 1(ONE) to 5(FIVE). 1(ONE) is the highest grade and 5(FIVE) the lowest.
Cambridge International AS Level (referred to as GCE AS Level on certificates)	• a(a), b(b), c(c), d(d) or e(e). • a(a) is the highest grade and e(e) the lowest. • We do not report performances below the standard of Grade e(e) on certificates. • The text 'Advanced Subsidiary' before the grade awarded shows the level the grade was awarded at for the syllabus. • One certificate is awarded for Cambridge O Level, Cambridge International AS Level and Cambridge International A Level.
Cambridge International A Level (referred to as GCE A Level on certificates)	• A*(a*), A(a), B(b), C(c), D(d) or E(e). • A*(a*) is the highest grade and E(e) the lowest. • We do not report performances below the standard of Grade E(e) on certificates. • The text 'Advanced Level' before the grade awarded shows the level the grade was awarded at for the syllabus. • One certificate is awarded for Cambridge O Level, Cambridge International AS Level and Cambridge International A Level.

Qualification	Grades shown on certificate
Cambridge International AS & A Level language syllabuses	• For some language syllabuses we report separate oral grades as Distinction, Merit or Pass, Distinction being the highest and Pass being the lowest. They are reported as follows: – with Distinction in Speaking – with Merit in Speaking – with Pass in Speaking. • We do not report performances below the standard required for 'Pass' on certificates.
Cambridge AICE Diploma	• The Cambridge AICE Diploma certificate is issued to candidates who have entered for the AICE Diploma. • Distinction, Merit or Pass will be awarded to candidates who meet the requirements of the Diploma. The total points scored will also be shown. – Distinction is awarded if a candidate achieves a point score of 360 to 420 points. – Merit is awarded if a candidate achieves a point score of 250 to 359 points. – Pass is awarded if a candidate achieves a point score of 140 to 249 points. • To determine the award, we allocate points to each potential counting syllabus according to the grade achieved. • The candidate will also receive a certificate showing the grades achieved in Cambridge International AS & A Level syllabuses. • Details of the award rules for the Diploma are in the Cambridge Guide to Making Entries.

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Qualification	Grades shown on certificate
Cambridge International Project Qualification	• A*(a*), A(a), B(b), C(c), D(d) or E(e). A*(a*) is the highest grade and E(e) the lowest. • We do not record performances below the standard of Grade E(e).

6.4.2 Incorrect details on certificates

You must check centre and candidate details, including the spelling of names and dates of birth on statements of entry and statements of results. You must tell us straight away about any errors before we send certificates. When you receive your certificates, check centre and candidate details, including the spelling of names. To ask for changes send us Results and Certificates – Form 12 with the incorrect certificate and the documents listed on the form.

We do not charge for replacing certificates where grades have changed. You must first send us the incorrect certificate with the form to receive a replacement certificate showing the final grades. We can only make small changes to certificates, for example errors in spellings of candidate names or centre details.

A Associate Centres should tell their Cambridge Associate about any errors on certificates.

PDQ Important dates

We charge for changes to certificates after the following dates. We also charge a courier fee.

- June series: 22 September 2025
- November series: 26 February 2026

Unless they have been lost by the candidate or centre, we will replace certificates until the following dates. After these dates we will send certifying statements.

- June series: 30 April 2027
- November series: 30 September 2027

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Replacement Certificate Application: Results and Certificates – Form 12

6.4.3 Name changes

A certificate is a permanent record of the candidate's achievement. It is in their name, as you entered it, at the time we make the award. We cannot provide replacement certificates to:

- show any changes that take place after the exam, for example a candidate changing their name because they get married or adopt a parent's name
- include part of a name that was not previously entered.

6.4.4 Combining grades on a single certificate

We send a separate certificate each series. We cannot combine grades achieved in different series or at different centres onto one certificate. If candidates took assessments at two different centres they will get two certificates. Each will show the grades they achieved at that centre.

We cannot delete any grades or syllabuses from a certificate.

6.4.5 Lost certificates

We will not replace certificates that have been lost. When you receive certificates from us, keep them in a safe place. If you lose a candidate's certificate, you may apply for a certifying statement on the candidate's behalf. If a candidate loses their certificate, they can apply for a certifying statement (see section 6.5).

6.4.6 Damaged certificates

We can agree to replace damaged certificates as long as we have satisfactory proof of the candidate's identity. See the instructions and deadlines in section 6.4.2. You must return the damaged certificate before we can replace it. We charge a fee per certificate and costs to send the certificate by courier.

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6.4.7 Cambridge changes

In rare cases, as a result of appeals or our quality checks we may need to change statements of results or certificates. We can do this at any time, and without liability to you or your candidates.

6.5 Certifying statements

A certifying statement is an official document that shows a candidate's grades in a particular series. It shows the grades as they appear on the certificate rather than the statement of results.

Certifying statements are fully endorsed by the Vice Chancellor of the University of Cambridge. Educational institutions and employers accept them as a legitimate record of results.

We can only send certifying statements once we have issued the certificate for that series. They show all grades, except for 'UNGRADED', 'NO RESULT' or 'PENDING' outcomes.

We produce a certifying statement for each series and for each qualification. If you need a certifying statement for a candidate who took different Cambridge qualifications in the same exam series, you need to apply for separate certifying statements for each qualification. If you need a certifying statement for a candidate who took the same Cambridge qualifications in different exam series, you need to apply for separate certifying statements for each series.

We can also send a certifying statement to an educational institution or employer as proof of the applicant's results.

For security reasons, we cannot give results by telephone or email.

6.5.1 Applying for a certifying statement

Candidates can ask us for a certifying statement at any time after we send certificates. Or, you can apply for them. You can ask for several at the same time.

There are two ways to apply:

- If you are paying by credit or debit card, apply online at www.cambridgeinternational.org/certstat
- If you are paying by invoice, download Results and Certificates – Form 7 from www.cambridgeinternational.org/forms

We will process requests within four weeks of receiving a correctly completed application.

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6.5.2 UK Applying for a certifying statement for Common European Framework of Reference (CEFR)

Candidates who need to prove their English language skills can apply for a certifying statement for CEFR. This is primarily (but not only) for candidates who have achieved a Cambridge IGCSE in either First Language English or English as a Second Language and who need a student visa to study in the UK.

There are two ways to apply:

- If you are paying by credit or debit card, apply online at www.cambridgeinternational.org/certstat
- If you are paying by invoice, download Results and Certificates – Form 11 from www.cambridgeinternational.org/forms

We process requests within four weeks of receiving a correctly completed application.

6.5.3 Fees

We charge the following fees for certifying statements:

- a search fee for each qualification
- a fee for extra copies, for example if you want us to send the same statement to several addresses. We charge a lower fee if you ask for extra copies at the same time
- a delivery fee for each address if we send the statement by courier or special delivery.

These fees are shown in our fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge International School – registered as online, we send the fees list to you.

If we cannot find a result for a candidate and series, we will credit your centre's account with the delivery fee and the cost of any extra copies, but we cannot credit your centre's account with the search fee.

Administrative forms

Forms available from www.cambridgeinternational.org/forms

- Certifying Statement Application: Results and Certificates – Form 7
- UK Certifying Statement Application for Common European Framework of Reference (CEFR): Results and Certificates – Form 11

6.6 Verifying results

A third party, such as an employer or an educational institution, can ask us to verify a candidate's results at any time. To do this, they must send us Results and Certificates – Form 8 with a copy of the certificate they want us to verify and the supporting information we ask for.

Our certificates have extra security features that can be checked using UV light. Contact us straight away if you think a certificate is not authentic. We can tell you how to check it.

We charge a fee per certificate per candidate to verify results. The fee is in our fees list in the 'My Messages' section of Direct. **NEW** If you are a Cambridge International School – registered as online, we send the fees list to you.

Administrative forms

Form available from www.cambridgeinternational.org/forms

- Third Party Verification of Results Application: Results and Certificates – Form 8

6.7 UK Applying to university

Students should contact the relevant university if they have any questions about admissions.

To find out which universities and institutions recognise Cambridge exams and qualifications, see the recognition policy search database www.cambridgeinternational.org/recognition-search

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6.8 Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint results

6.8.1 Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint diagnostic feedback and statements of achievement

Cambridge Primary Checkpoint tests are for the final year of primary education. The diagnostic feedback gives you an international benchmark of how your candidates performed in English, English as a Second Language, Mathematics and Science. This helps you and your teachers to recognise and address the learning needs of your candidates. We mark the tests.

Cambridge Lower Secondary Checkpoint tests are for candidates beginning courses in Cambridge IGCSE or O Level English, English as a Second Language, Mathematics and Science. We mark the tests.

NEW You will receive electronic and printed copies of statements of achievement (PDF). You will receive electronic copies only of diagnostic feedback reports (PDF) and breakdown of marks (Microsoft Excel).

A Cambridge Associates are responsible for sending diagnostic feedback to their Associate Centres according to their local arrangements.

You can give the statements of achievement and reports to students to your candidates as soon as you receive them.

We are unable to issue results for candidates who have not completed the full assessment in a Cambridge Checkpoint subject.

Extra guidance

For guidance on how to use the diagnostic feedback reports, see the following:

- Cambridge Primary Checkpoint Feedback Guide on the Cambridge Primary website at https://primary.cambridgeinternational.org/checkpoint
- Cambridge Lower Secondary Checkpoint Feedback Guide on the Cambridge Lower Secondary website at https://lowersecondary.cambridgeinternational.org/checkpoint

For more information about Cambridge Primary and Lower Secondary support sites, see section 1.1.11.

6.8.1.1 Chk Electronic and printed diagnostic feedback

We provide the following diagnostic feedback.

In PDF:

- centre report
- report on teaching group
- individual statements of achievement
- individual reports to students.

In Microsoft Excel:

- syllabus summary report
- component report.

We upload Cambridge Primary Checkpoint and Lower Secondary Checkpoint end of series reports to the Cambridge Primary and Lower Secondary websites at a later date.

Diagnostic feedback is not available under the 'Results' tab in Direct. Instead we send diagnostic feedback through the 'My Messages' section of Direct. We do not send results directly to anyone.

A Associate Centres will receive their results according to their local arrangements.

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NEW To download your diagnostic feedback reports and breakdown of marks, go to the 'My Messages' section of Direct.

When you receive your feedback, check that you have all the documents listed above. In particular, check you have a statement of achievement and a report to student for each candidate. If any documents are missing, email info@cambridgeinternational.org straight away. You are responsible for giving your candidates their statements of achievement and reports. A If you work in an Associate Centre, contact your Cambridge Associate if any documents are missing.

Programme	Performance band and Checkpoint score reporting
Cambridge Primary Checkpoint English, English as a Second Language, Mathematics, Science	Basic, Aspiring, Good, High, Outstanding Checkpoint standardised scores on a scale between 0 and 50
Cambridge Lower Secondary Checkpoint English, English as a Second Language, Mathematics, Science	Basic, Aspiring, Good, High, Outstanding Checkpoint standardised scores on a scale between 0 and 50

Qualification	Grade reporting
Cambridge Primary Checkpoint Global Perspectives	Gold(Gold), Sil(Silver), Brz(Bronze) U(Ungraded) shows that the candidate did not reach the standard required for Grade Brz(Bronze).
Cambridge Lower Secondary Checkpoint Global Perspectives	Gold(Gold), Sil(Silver), Brz(Bronze) U(Ungraded) shows that the candidate did not reach the standard required for Grade Brz(Bronze).

6.8.2 Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint Global Perspectives results

We send electronic results for Cambridge Primary Checkpoint and Lower Secondary Checkpoint Global Perspectives through Direct. We also send printed copies of candidate statements of achievement.

We provide the following electronic results files:

- centre results information (Microsoft Excel)
- individual statements of achievement (PDF)
- moderation report (PDF).

You can give the statements of achievement to your candidates as soon as you receive them.

We report syllabus grades on the centre results information sheet as in the table below left.

'NO RESULT' or 'X' means one of the following:

- You told us the candidate was absent or withdrawn and there is no record of their mark. Therefore we cannot award a grade.
- You did not tell us the candidate was absent or withdrawn and there is no record of their mark. Therefore we cannot award a grade.
- We disqualified the candidate. If this happened we will have told you why.

'PENDING' or 'Q' means that we cannot issue a result at the moment but will do this soon.

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Important dates

Chk Your Cambridge Primary Checkpoint and Lower Secondary Checkpoint diagnostic feedback for English, English as a Second Language, Mathematics and Science will be available to download from the 'My Messages' section of Direct on the following dates:

- May series: 19 June 2025
- October series: 18 December 2025

Your **end of series reports** will be available to download from the Cambridge Primary and Lower Secondary support sites on the following dates:

- May series: early July 2025
- October series: late December 2025

We do not send printed copies of your diagnostic feedback or end of series reports.

Chk Cambridge Primary Checkpoint and Lower Secondary Checkpoint Global Perspectives results will be available to download from the 'My Messages' section of Direct on the following dates:

- May series: 19 June 2025

We send you printed statements of achievement by the end of June 2025.

- October series: 18 December 2025

We send you printed statements of achievement by early January 2026.

6.8.3 Chk Incorrect details on results

You must check centre and candidate details, including the spelling of names and dates of birth on statements of entry. You must tell us about any errors straight away, before we send results. Check centre and candidate details when you receive your results. If anything is incorrect, email info@cambridgeinternational.org as soon as possible. We can only make small changes, for example to candidate names, dates of birth or centre details. We upload electronic replacement statements of achievement to the 'My Messages' section of Direct free of charge.

A If you work in an Associate Centre, please tell your Cambridge Associate about any errors.

Important information

Replacement statements of achievement after results release will be sent electronically only.

6.8.4 Chk Name changes

A statement of achievement is in the candidate's name, as you entered it, at the time we issue the statement. We cannot provide replacement statements of achievement to:

- reflect any changes that take place after the test, for example a candidate changing their name because they adopt a parent's name
- include part of a name that was not previously entered.

6.8.5 Chk Combining results on a single statement of achievement

We send a separate statement of achievement each series. We cannot combine scores or grades achieved in different series onto one statement of achievement, or delete any scores or grades from a statement of achievement.

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Section 7: Appeals: Regulations and guidance

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7.1 Introduction

7.1.1 Purpose

This section tells you how to appeal against some kinds of decisions we have made in relation to our general qualifications (where we issue certificates). This includes Cambridge IGCSE, Cambridge IGCSE (9–1), Cambridge IGCSE (Core), Cambridge O Level, Cambridge International AS & A Level and Cambridge IPQ.

A Associate Centres must make appeals through their Cambridge Associate. Private candidates can only appeal through the Cambridge International School or Cambridge Associate they are registered with.

7.1.2 Scope

We accept appeals against five kinds of decision:

1 Outcomes of enquiries about results (see section 7.2).
2 Malpractice decisions (see section 7.3).
3 Access arrangement decisions (see section 7.4).
4 Special consideration decisions (see section 7.4).
5 Late arrival decisions (see section 7.4).

We can only address these through the appeals process, not in any other way, including our complaints process.

Contact Customer Services (info@cambridgeinternational.org) about any other matters.

7.1.3 About the appeals process

You can appeal under the five circumstances in section 7.1.2 as part of the services we provide. These appeals are not a judicial or quasi-judicial proceeding.

7.1.4 Fees

We charge a fee for each Stage 1 and Stage 2 appeal about enquiries about results. The charge is per appeal, not per candidate. See the fees list in the 'My Messages' section of Direct. NEW If you are a Cambridge International School – registered as online, we send the fees list to you.

If your appeal is successful we will not charge you.

7.1.5 More information

You can find more information as follows:

- access arrangements (section 1.3 of this handbook)
- late arrivals (section 5.1.10 of this handbook)
- special consideration (section 5.5 of this handbook)
- malpractice (section 5.6 of this handbook)
- results and enquiries about results (sections 6.1 and 6.3 of this handbook).

Our processes may differ from those of other exam boards. Read this material carefully to make sure you appeal correctly.

If you have any questions contact us at info@cambridgeinternational.org or on +44 1223 553554.

Administrative forms

Forms available from the 'Support Materials' section of Direct:

- Application for an Appeal: Access Arrangements, Malpractice, Special Consideration and Late Arrivals: Appeals – Form 1
- Application for an Appeal Following an Enquiry About Results: Appeals – Form 2

7.2 Appeals against the outcome of enquiries about results

If you have an enquiry about results outcome and wish to appeal, you must follow the procedures in this section. A two-stage appeals process is available.

If you do not follow these procedures, you may lose your opportunity to make an appeal.

The appeals process is not a way of getting another opinion about the candidate's or candidates' work. It is a way to challenge us if you believe we have not followed our procedures.

7.2.1 Making a Stage 1 appeal against the outcome of an enquiry about results

7.2.1.1 Who can make a Stage 1 appeal

You must make a Stage 1 appeal in writing. The Head of Centre must sign and support it.

All appeals must be made by the centre the candidate was registered with. We do not accept appeals directly from parents/guardians or candidates.
A Associate Centres must make appeals through their Cambridge Associate.

You may only make a Stage 1 appeal for candidates who have already received an enquiry about results outcome. You may not make an appeal for a candidate who has received a copy of a script without receiving the outcome of an enquiry about results.

Example 1: You have made enquiries about results for two candidates. One has already received an outcome. You may appeal for the candidate who has already received their outcome. You must wait until the second candidate has received their outcome to make a Stage 1 appeal. If you do not have the outcome for the second candidate by the appeal deadline and you wish to appeal for the first candidate, you will need to submit two separate appeals to meet the deadline for each candidate.

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Example 2: You have made enquiries about results for some, but not all, candidates entered for a syllabus component. You can only appeal against the outcomes of candidates you have made enquiries about results for. You may not include the other candidates. You may only appeal for a whole group if you have made enquiries about results for all candidates in the group.

7.2.1.2 How to make a Stage 1 appeal

To make a Stage 1 appeal you must show you have a permitted reason for appeal. The reasons we consider are that either:

1 We did not comply with the commitments made in our Code of Practice; or

2 We did not apply our procedures properly and fairly in arriving at our judgements.

We will not consider appeals for any other reasons. For example, the following do not, on their own, constitute evidence that we have not complied with the Code of Practice or that we have not followed our procedures properly and fairly:

1 You disagree with our markers' or moderators' judgements, either originally or as part of an enquiry about results.

2 You disagree with our judgements on grade thresholds at either a component or syllabus level.

3 Candidates' results and their results in other assessments are different.

To make a Stage 1 appeal send us Appeals – Form 2, available from the 'Support Materials' section of Direct. You must fully explain the reason for the appeal, otherwise we will reject it.

Submit the form through the 'Enquiries about results' section of Direct within the time frame in section 7.2.1.3. If you are unable to submit the form through Direct you may email it to info@cambridgeinternational.org with 'Stage 1 Appeal – EAR' in the subject line, within the time frame in section 7.2.1.3. Once you have made an appeal, you can only contact us about it in writing. We will not communicate with candidates or parents/guardians involved in the appeal.

7.2.1.3 When to make a Stage 1 appeal

You must send us Appeals – Form 2 within 28 days of the date when we uploaded the outcome letter to Direct. If the enquiry included a request for a copy of the script, you must send the appeal within 28 days of the date we uploaded the outcome letter or the copy of the script – whichever is later. If your appeal is late we will not accept it.

You can make a Stage 1 appeal for more than one candidate, as long as it meets the requirements in section 7.2.1.1. The appeal must be for the same syllabus and component for all candidates. It must be within the 28-day deadline for each candidate. You do not need to appeal for all candidates at one time.

Example 1: You receive the outcome of an enquiry about results for one candidate, which we upload to Direct on 1 January. You have until 29 January to make your Stage 1 appeal following the instructions in section 7.2.1.2.

Example 2: You have made enquiries about results, with return of copies of scripts, for five candidates for the same syllabus and component. We upload the copies of the scripts on 1, 2, 3, 4 and 5 January respectively. To make a Stage 1 appeal for all five candidates in a single group, you would need to submit it by 29 January – the deadline for the earliest script you received. To submit the appeals separately, you must keep within the 28-day limit for each appeal.

Example 3: You have made enquiries about results, at different times, for five candidates for the same syllabus and component. We upload the first outcome letter on 1 January. By 29 January, we have uploaded three of the outcome letters.

To make a Stage 1 appeal you would need to submit it for the first three candidates by 29 January, the deadline for the earliest outcome you received. You may then decide whether to submit appeals for the other two candidates separately.

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7.2.1.4 Stage 1 appeal consideration

We will email you to acknowledge your appeal within three working days of receiving it. If you have not received an email within that time, please contact us to check we have received your appeal.

One or more members of Cambridge staff, none of whom were involved in the original decision, will review your appeal request and any relevant evidence, and will consider whether we:

1 Complied with the commitments made in our Code of Practice; and

2 Applied our procedures properly and fairly in arriving at our judgements.

We will write to you within 21 days of receiving the appeal to let you know whether it was fully successful, partly successful or unsuccessful.

You must tell candidates and parents/guardians the outcome as soon as you receive it.

7.3 Appeals against malpractice decisions

7.3.1 Making a Stage 1 appeal against a malpractice decision

7.3.1.1 Who can make a Stage 1 appeal

You must make a Stage 1 appeal in writing. The Head of Centre must sign and support it.

All appeals must be made by the centre the candidate was registered with. We do not accept appeals directly from parents/guardians or candidates. **NEW** It is your responsibility to make sure that candidates and their parents/guardians are aware of the appeals process. We encourage you to explain the process to them and the approach you are taking in appealing on the candidates' behalf.

A Associate Centres must make appeals through their Cambridge Associate.

7.3.1.2 How to make a Stage 1 appeal

To make a Stage 1 appeal send us Appeals – Form 1 available from the 'Support Materials' section of Direct. You must explain your reasons for appealing against the decision. **NEW** These reasons should include why you believe that we did not comply with the commitments made in our Code of Practice and/or that we did not apply our published regulations properly and fairly in arriving at our judgement. You must give us any extra information or evidence that you want us to consider. We will not accept an appeal based on the following reasons:

1 The individual did not mean to commit malpractice.

2 The individual has a good academic record.

3 The individual could lose a university place.

4 The individual regrets what they did.

Email Appeals – Form 1 to info@cambridgeinternational.org with 'Stage 1 Appeal – MALPRACTICE' in the subject line within the time frame specified in section 7.3.1.3.

Once you have made an appeal, you can only contact us about it in writing. We will not communicate with candidates or parents/guardians involved in the appeal.

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7.3.1.3 When to make a Stage 1 appeal

You must make your Stage 1 appeal within 28 days of the date of the letter telling you of the outcome of the malpractice investigation. If your appeal is late we will not accept it.

Example: You receive a letter, dated 1 January, telling you the outcome of a malpractice case. You have until 29 January to make your Stage 1 appeal following the instructions in section 7.3.1.2.

7.3.1.4 Stage 1 appeal consideration

One or more members of Cambridge staff, none of whom were involved in the original decision, will review your appeal request, including any relevant evidence that you submit, and will consider whether we:

1 Did not comply with the commitments made in our Code of Practice; and

2 Did not apply our published regulations properly and fairly in arriving at our judgements.

We will write to you within 28 days of receiving the appeal to let you know whether it was fully successful, partly successful or unsuccessful.

You must tell candidates and parents/guardians the outcome as soon as you receive it.

For information about the Stage 2 appeals process, see section 7.5.

7.4 Appeals against access arrangement, special consideration and late arrival decisions

If you are dissatisfied with the outcome of an access arrangement application, a request for special consideration or a late arrival outcome, the Head of Centre may appeal. A two-stage appeals process is available.

The outcome of a special consideration request is our decision to accept or not accept an application and does not refer to how much special consideration should be given.

NEW You may request a second review of the tariff awarded in your approved 'Special consideration – present but disadvantaged' application. A second person will review your application and the tariff awarded to confirm its accuracy. To request this, please email info@cambridgeinternational.org and include 'Special consideration – second review' in the subject line.

Important information

If you are submitting an access arrangement or special consideration appeal and you submit new evidence that was not considered as part of the original decision, this may be reviewed and the appeal may not be needed.

7.4.1 Making a Stage 1 appeal against an access arrangement, special consideration or late arrival decision

7.4.1.1 Who can make a Stage 1 appeal

You must make a Stage 1 appeal in writing. The Head of Centre must sign and support it.

All appeals must be made by the centre the candidate was registered with. We do not accept appeals directly from parents/guardians or candidates. NEW It is your responsibility to make sure that candidates and their parents/guardians are aware of the appeals process. We encourage you to explain the process to them and the approach you are taking in appealing on the candidates' behalf.

A Associate Centres must make appeals through their Cambridge Associate.

7.4.1.2 How to make a Stage 1 appeal

To make a Stage 1 appeal send us Appeals – Form 1, available from the 'Support Materials' section of Direct. You must explain your reasons for appealing against the decision. NEW These reasons should include why you believe that we did not comply with the commitments made in our Code of Practice and/or that we did not apply our published regulations properly and fairly in arriving at our judgement. You must give us any extra information or evidence that you want us to consider.

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Email Appeals – Form 1 to info@cambridgeinternational.org with 'Stage 1 Appeal – compliance' in the subject line within the time frame in section 7.4.1.3. Once you have made an appeal, you can only contact us about it in writing. We will not communicate with candidates or parents/guardians involved in the appeal.

7.4.1.3 When to make a Stage 1 appeal

You must appeal within 28 days of the date when we told you about our decision. If your appeal is late we will not accept it.

Example: You receive a letter, dated 1 January, with our decision about the late arrival of a candidate, or your application for access arrangements or special consideration. You have until 29 January to make your Stage 1 appeal following the instructions in section 7.4.1.2.

NEW An appeal can only be made in cases where your application has been rejected.

You may request a second review of the tariff awarded in your approved 'Special consideration – present but disadvantaged' application. A second person will review your application and the tariff awarded to confirm its accuracy. To request this, please email info@cambridgeinternational.org and include 'Special consideration – second review' in the subject line.

7.4.1.4 Stage 1 appeal consideration

Three members of Cambridge staff, none of whom were involved in the original decision, will review your appeal request and evidence (including any new evidence you have submitted). We will consider whether we:

1 Did not comply with the commitments made in our Code of Practice; and

2 Did not apply our published regulations properly and fairly in arriving at our judgements.

We will write to you within 28 days of receiving the appeal to let you know whether it was successful.

You must tell candidates and parents/guardians the outcome as soon as you receive it.

For information about the Stage 2 appeals process, see section 7.5.

7.5 Stage 2 appeals

If you are not satisfied with the outcome of a Stage 1 appeal, you can ask for a Stage 2 appeal. Instructions, including the deadlines, are in:

- section 7.5.1 for appeals against the outcome of enquiries about results
- section 7.5.2 for appeals against malpractice decisions
- section 7.5.3 for appeals against access arrangement, special consideration or late arrival decisions.

The instructions vary depending on the kind of decision you would like to appeal, so it is important to refer to the correct section.

Each Stage 2 appeal is heard by an independent panel who will decide the outcome.

All Stage 2 appeals are dealt with by a team which does not have any involvement in cases before they reach a Stage 2 appeal.

Email all correspondence related to Stage 2 appeals to info@cambridgeinternational.org with 'Stage 2 Appeal' in the subject line. Send a copy to cistage2appeals@cambridgeinternational.org

7.5.1 Making a Stage 2 appeal against the outcome of enquiries about results

If the appeal is not fully successful at Stage 1, you may choose to proceed to Stage 2.

7.5.1.1 Who can make a Stage 2 appeal

You must make a Stage 2 appeal in writing. The Head of Centre must sign and support it.

You may make a Stage 2 appeal for a candidate if they have received an enquiry about results outcome and a Stage 1 appeal outcome. All appeals must be made by the centre the candidate was registered with. We do not accept appeals directly from parents/guardians or candidates. (A) Associate Centres must make appeals through their Cambridge Associate.

Example: You made a Stage 1 appeal against the outcome of an enquiry about results for candidate A and have received an outcome. Candidate B had an enquiry about results outcome, but you did not make a Stage 1 appeal. You may make a Stage 2 appeal for candidate A but not candidate B.

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7.5.1.2 How to make a Stage 2 appeal

To make a Stage 2 appeal send us Appeals – Form 2, available from the 'Support Materials' section of Direct. We will not accept an appeal that is not based on either of the two permitted reasons – either that:

1 We did not comply with the commitments made in our Code of Practice; or

2 We did not apply our procedures properly and fairly in arriving at our judgements.

You must include all your arguments and any evidence you wish to provide. You may give evidence that you did not give at Stage 1.

Email the form to info@cambridgeinternational.org with 'Stage 2 Appeal' in the subject line. Send a copy to cistage2appeals@cambridgeinternational.org within the time frame specified in section 7.5.1.3.

7.5.1.3 When to make a Stage 2 appeal

You must make your Stage 2 appeal within 14 days of the date of the Stage 1 outcome letter. If your appeal is late we will not accept it.

You can make a Stage 2 appeal for more than one candidate, as long as it meets the requirements in sections 7.5.1.1 and 7.5.1.2 You must do this within 14 days of the date of each Stage 1 appeal outcome letter.

Example 1: You receive the outcome of a Stage 1 appeal, dated 1 January, for one candidate. You have until 15 January to make your Stage 2 appeal.

Example 2: You made Stage 1 appeals for two groups of candidates for the same syllabus and component. The Stage 1 outcome letters are dated 1 January and 5 January. If you wish to make a Stage 2 appeal for both groups together, you would need to submit it by 15 January, the deadline for the earliest outcome you received.

7.5.2 Making a Stage 2 appeal against a malpractice decision

If the appeal is not fully successful at Stage 1, you may choose to proceed to Stage 2.

7.5.2.1 Who can make a Stage 2 appeal

You must make a Stage 2 appeal in writing. The Head of Centre must sign and support it.

All appeals must be made by the centre the candidate was registered with. We do not accept appeals directly from parents/guardians or candidates.
A Associate Centres must make appeals through their Cambridge Associate.

7.5.2.2 How to make a Stage 2 appeal

To make a Stage 2 appeal send us Appeals – Form 1 available from the 'Support Materials' section of Direct. You must explain your reasons for making a Stage 2 appeal against the decision. We will not accept an appeal that is not based on either of the two permitted reasons – either that:

1 We did not comply with the commitments made in our Code of Practice; or

2 We did not apply our published regulations properly and fairly in arriving at our judgements.

You must also provide any extra information or evidence that you would like the panel to consider.

Email Appeals – Form 1 to info@cambridgeinternational.org with 'Stage 2 Appeal' in the subject line, copying in cistage2appeals@cambridgeinternational.org within the time frame specified in section 7.5.2.3.

7.5.2.3 When to make a Stage 2 appeal

You must make your Stage 2 appeal within 14 days of the date of the Stage 1 outcome letter. If your appeal is late we will not accept it.

7.5.3 Making a Stage 2 appeal against an access arrangement, special consideration or late arrival decision

If the appeal is not fully successful at Stage 1, you may choose to proceed to Stage 2.

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7.5.3.1 Who can make a Stage 2 appeal

You must make a Stage 2 appeal in writing. The Head of Centre must sign and support it.

All appeals must be made by the centre the candidate was registered with. We do not accept appeals directly from parents/guardians or candidates.
A Associate Centres must make appeals through their Cambridge Associate.

7.5.3.2 How to make a Stage 2 appeal

Send us Appeals – Form 1, available from the 'Support Materials' section of Direct. You must explain your arguments against the decision. We will not accept an appeal that is not based on either of the two permitted reasons – either that:

1 We did not comply with the commitments made in our Code of Practice; or

2 We did not apply our published regulations properly and fairly in arriving at our judgements.

Give us any extra information or evidence that you would like the panel to consider alongside what you provided at Stage 1.

Email Appeals – Form 1 to info@cambridgeinternational.org with 'Stage 2 Appeal' in the subject line, copying in cistage2appeals@cambridgeinternational.org within the time frame specified in section 7.5.3.3.

7.5.3.3 When to make a Stage 2 appeal

You must make your Stage 2 appeal within 14 days of the date of the Stage 1 outcome letter. If your appeal is late we will not accept it.

7.5.4 Before the Stage 2 appeal meeting

7.5.4.1 Scheduling the meeting

When you make your Stage 2 appeal, we will tell you we have received it within three working days. We will usually confirm the date and time of the meeting within 14 days. If you have not received an email within that time, please contact us to check we have received your appeal.

All Stage 2 appeal meetings take place at our offices in Cambridge or remotely. We will inform you of the meeting location, which you cannot change.

If you have told us you wish to attend the meeting, we will also ask you to name representatives from your centre who will attend and provide their email addresses. We will not be able to reschedule meetings to suit your representatives. You may name alternative representatives if those you originally named cannot attend, in line with section 7.5.5.3.

7.5.4.2 Submitting materials for consideration

If you want us to consider evidence or arguments you did not include in your Stage 1 appeal, you must include these in writing when you make your Stage 2 appeal. You must normally submit them electronically.

If you want to include evidence or arguments you could not reasonably have been aware of at the time you submitted the Stage 2 appeal, you may ask the chair for permission. You must send it to us at least five working days before the meeting. You must also explain why the material was not reasonably available at the time you made the Stage 2 appeal. The panel will not accept them if they were available to you when you submitted your Stage 2 appeal.

We strongly encourage you to submit all materials electronically as this is the most secure and reliable method. If you need to send us printed copies, you must send them when you request your Stage 2 appeal. You must provide six copies in the following format:

1 A4 size.

2 No staples, spiral binding or other permanent binding (hole-punched paper bound with tags or in arch-lever files is acceptable).

3 Consecutively numbered.

Contact us if you wish to submit materials that are not easily reproduced.

7.5.4.3 The Appeal Pack

We will send an 'Appeal Pack', normally by email, to everyone attending the meeting (see section 7.5.5) no later than five working days before the meeting. This will contain:

1 All relevant outcome/decision letters and Stage 1 appeal outcome letters.

2 All appeal forms.

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3 All relevant material you sent us as evidence in the Stage 1 appeal and, in the case of malpractice, special consideration, late arrivals and access arrangements, when we first considered the matter.

4 All material you sent us as evidence when you made the Stage 2 appeal.

5 All our evidence.

We may make some sensitive materials available to the panel at the meeting but these will not be distributed. They will be clearly identified on the cover sheet of the 'Appeal Pack'.

If you are attending the hearing and are not able to access the 'Appeal Pack' or any of its contents, please contact us on cistage2appeals@cambridgeinternational.org as soon as possible.

7.5.5 Stage 2 appeal meeting participants

7.5.5.1 The panel of the Cambridge Appeals Committee

At the Stage 2 appeal meeting, a panel of the Cambridge Appeals Committee will consider the appeal.

The panel will consist of an independent chair and two panel members. At least one panel member will be independent. This means they are not, and have not been, members of our board or committees or an employee or examiner with Cambridge University Press & Assessment at any time during the five years before we appointed them. Neither the chair, nor either member of the panel (whether independent or not), will have any personal interest in the decision being appealed.

A Cambridge employee will be appointed to act as servicing officer on behalf of the panel. They will take notes of the meeting, communicate the outcome and prepare a summary record of the meeting (see section 7.5.7.2). The servicing officer will be present for the panel's deliberation after the meeting but will not take part in it. The servicing officer acts for the panel and not for Cambridge.

Other people may also be present to make sure the meeting runs fairly and efficiently.

7.5.5.2 Cambridge representatives

Cambridge will be represented by a member of either the Compliance team (in malpractice, access arrangement, special consideration or late arrival cases) or the Assessment Standards and Quality team (in the case of appeals against the outcome of enquiries about results). Other subject, assessment or specialist staff may also represent Cambridge. There may be up to a total of three Cambridge representatives.

7.5.5.3 Centre representatives

The meetings are designed to be equally fair, whether or not centre representatives attend remotely or in person, and the panel always considers all written submissions.

The usual format of meetings is remote via Microsoft Teams. Please make sure your representatives have a stable internet connection and have joined the meeting via the Teams link no later than five minutes before the hearing is due to start. The chair is able to start the meeting on time even if all representatives are not present, and is entitled to refuse entry to any representatives who arrive late. The meeting will not be delayed, paused, repeated, rescheduled or cancelled due to any problems your representatives may have in their attendance.

Up to three members of your staff can attend. You must tell us if anyone from your centre would like to attend on the Stage 2 appeal form when you request a Stage 2 appeal. If you attend remotely, your Head of Centre must sign a declaration of continued adherence to the terms of the Cambridge Handbook relating to attending the Stage 2 appeal meeting online. We send the declaration once we accept an appeal.

Candidates and their parents/guardians cannot normally attend as representatives. As the Stage 2 appeal is not a judicial or quasi-judicial process, legal representatives cannot attend.

7.5.5.4 Observers

The panel and servicing officer can decide to allow observers to attend. Observers must be:

1 Over the age of 18.

2 Not attending in any capacity as a legal representative or legal advisor.

If observers attend they will count towards the limit of three representatives.

Observers must not try to take part in the meeting in any way. If they do this the chair will give them a warning. After that warning, if an observer tries to take part again, the chair may ask them to leave.

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7.5.5.5 Conduct of participants

All representatives and observers attending the meeting are expected to behave with courtesy to the panel, the servicing officer, and all other participants and observers. The panel will not tolerate rudeness, shouting, attempted intimidation or other inappropriate behaviour. The chair may ask any participant or observer who behaves in such a way to leave. The chair's decision is final. The meeting will then carry on as normal and shall not be prejudiced by the removal. If we need to we may take further steps to make sure the panel, Cambridge staff and centre representatives are safe. We can ban participants or observers from visiting our premises or contacting staff in future.

7.5.6 The meeting

7.5.6.1 Centre not attending

When centre representatives do not attend the meeting, the order will be as follows.

7.5.6.1.1 Introduction

Cambridge representatives will be invited to join the panel in the meeting. The chair will introduce the panel members and ask everyone to introduce themselves. The chair will then describe the procedures that will be followed.

7.5.6.1.2 The centre's position

The chair will summarise the centre's position based on its written submissions.

7.5.6.1.3 Cambridge's presentation

- The Cambridge representatives will be asked to put forward their arguments.
- The panel will be able to ask questions.

7.5.6.1.4 Final summaries

The chair will then invite the Cambridge representatives to summarise their arguments.

7.5.6.1.5 Deliberation

Cambridge representatives will be asked to leave while the panel considers whether there are any questions. The chair may also ask observers to leave. If the panel has more questions, Cambridge representatives will be asked back into the room.

If the panel has no more questions, the representatives will be allowed to leave.

The panel will discuss the matter in private. They will consider:

1 Whether Cambridge's procedures were consistent with the commitments made in our Code of Practice; and

2 Whether Cambridge applied those procedures properly and fairly in arriving at those judgements.

The panel may, after deliberation:

(i) find the appeal successful, in full or in part

(ii) find the appeal unsuccessful; or

(iii) require Cambridge to carry out further work in accordance with instructions from the panel.

7.5.6.2 Centre attending

When centre representatives are attending, the order will be as follows.

7.5.6.2.1 Introduction

Your representatives and Cambridge representatives, along with any observers, will be invited to join the panel in the meeting room. The chair will introduce the panel members and ask everyone to introduce themselves. The chair will then describe the procedures that will be followed.

7.5.6.2.2 The centre's presentation

- The chair will ask centre representatives to put forward their arguments.
- The chair will invite Cambridge representatives to ask the centre representatives questions.
- The panel will be able to ask the centre representatives questions.

7.5.6.2.3 Cambridge's presentation

- The chair will ask Cambridge representatives to put forward their arguments.
- The chair will invite centre representatives to ask the Cambridge representatives questions.
- The panel will be able to ask the Cambridge representatives questions.

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7.5.6.2.4 Final summaries

- Centre representatives and Cambridge representatives will be given a final opportunity to make any comments.
- The chair will then invite first the Cambridge representatives and then the centre representatives to summarise their arguments. To make sure all involved are treated fairly, summaries should include only matters already discussed in the meeting and not introduce any new material or arguments. The chair will tell the panel to ignore any arguments or evidence not included in the Stage 2 Appeal Request Form or allowed under section 7.5.4.2.

7.5.6.2.5 Deliberation

The Cambridge and centre representatives will be asked to leave while the panel considers whether there are any more questions. The chair may also ask observers to leave. If the panel has more questions, both the Cambridge representatives and the centre representatives will be asked back into the room.

If the panel has no more questions, the representatives will be allowed to leave.

The panel will discuss the matter in private. They will consider:

1 Whether Cambridge's procedures were consistent with the commitments made in our Code of Practice; and

2 Whether Cambridge applied those procedures properly and fairly in arriving at those judgements.

The panel may, after deliberation:

(i) find the appeal successful, in full or in part

(ii) find the appeal unsuccessful; or

(iii) require Cambridge to carry out further work in accordance with instructions from the panel.

7.5.6.3 Length of the meeting

The chair may set a time limit on the meeting or on specific parts of it (e.g. presentations). Their decision is final.

When making their presentations, the Cambridge and centre representatives should assume that the panel has thoroughly reviewed the 'Appeal Pack' and focus on explaining their key arguments. The centre should not introduce any new arguments or evidence. They can only do this if extra evidence was allowed in line with section 7.5.4.2. The chair may ask the panel to ignore any extra evidence. Their decision is final.

7.5.7 After the meeting

7.5.7.1 The outcome

After the panel has agreed the outcome, the servicing officer for the appeal will tell the centre. This is usually within two working days of the Stage 2 appeal meeting. In all cases, you will receive the outcome within 28 days of Cambridge receiving the Stage 2 appeal.

The outcome is final. Nobody may discuss the appeal or the issues underlying it with the centre, the candidate or anyone representing the centre or the candidate.

You must tell candidates and parents/guardians the outcome as soon as you receive it. You must also tell them that the outcome is final.

7.5.7.2 Summary meeting record

After the meeting, the servicing officer will prepare a summary. This is not a verbatim account or a transcript. It is a summary of the key points made at the meeting and states the outcome. Once the chair has approved the draft, if you attended the meeting you will be able to suggest any corrections.

You will normally receive a letter containing the final summary within six weeks of the meeting.

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Access arrangements	Access arrangements are the principal way in which Cambridge complies with its duty, as guided by the UK Equality Act (2010), to make 'reasonable adjustments' for candidates with special educational needs, disability, illness, or injury. Where a candidate would otherwise be at a substantial disadvantage in comparison to a candidate with no special educational needs, disability, illness, or injury, we may be able to agree pre-exam access arrangements. These arrangements help a candidate by minimising accessibility barriers and maximising their opportunity to demonstrate their knowledge, skills and understanding in an assessment.
ADIP	The entry code for the Advanced International Certificate of Education Diploma.
Administrative zone	An administrative zone is a part of the world where the clocks read similar times. We have six administrative zones and allocate every school to one depending on their country and location. We publish a different version of the timetable and Cambridge Guide to Making Entries for each administrative zone for each series. Using Key Times and administrative zones together helps us make sure countries in similar time zones have their candidates under exam or supervisory conditions at the same time to maintain the security of question paper content. You can check your administrative zone and Key Times at www.cambridgeinternational.org/preparation
Agreement	The Agreement between Cambridge and a centre or Cambridge Associate for providing programmes and qualifications. The Cambridge Handbook forms part of the Agreement.
Appeals	Under certain circumstances, we provide a formal process for requesting a review of our decision. This process is called an 'appeal'. Cambridge accepts appeals in relation to five kinds of decision: 1 Outcomes of enquiries about results. 2 Malpractice decisions. 3 Access arrangement decisions. 4 Special consideration decisions. 5 Late arrival decisions. For further information about appeals, please refer to section 7 of this handbook.
NEW Apply for Access Arrangements	A service to allow centres to apply for access arrangements for candidates via My Cambridge. We are launching Apply for Access Arrangements in phases throughout 2025 to better support you. When it is available for you to use, we will contact you by email.
Assessment	The method used to evaluate a candidate's performance, for example, a written exam or coursework.
A Associate Agreement	The Agreement between Cambridge and the Cambridge Associate setting out the Cambridge Associate's legal responsibilities for Associate Centres. The Cambridge Handbook forms part of the Associate Agreement.
A Associate Centre	In our operational communications we use the term 'Associate Centre' for an organisation which is affiliated with a Cambridge Associate, whose premises have been inspected and approved, and for whom the Cambridge Associate is responsible under the Agreement. We give the external brand status 'Cambridge International School' to Associate Centres.

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Attendance register	Forms used in the exam room to record the presence or absence of each candidate.
UK **A2C**	If you are a UK centre, see the Cambridge Handbook (UK Supplement) 2025.
Cambridge AICE Diploma	Advanced International Certificate of Education Diploma.
A **Cambridge Associate**	An organisation such as a ministry, exams council, distributor, department of education or other agency, which has responsibility for Associate Centres through an Associate Agreement with Cambridge.
NEW **Cambridge Early Years**	Our Cambridge Early Years programme is for learners aged 3 to 6. It is the first stage in our Cambridge Pathway, which gives students a clear path for educational success from age 3 to 19. Organisations approved to offer Cambridge Early Years are called Cambridge Early Years Centres.
Cambridge Guide to Making Entries	The Cambridge Guide to Making Entries is available before each series from the 'Support Materials' section of Direct. It includes entry option codes and instructions for submitting entries. Entry option codes are specific to each series so make sure you are using the correct guide for your administrative zone.
Cambridge Handbook	This document. The Cambridge Handbook sets out the regulations for running Cambridge assessments, and provides guidance on the administrative tasks exams officers need to carry out during each exam series. It details the responsibilities of centres and Cambridge Associates, and forms part of the legal contract between Cambridge and the centre / Cambridge Associate. Our regulations exist to make sure that Cambridge candidates all over the world have the same exam experience and are treated equally and fairly. The Cambridge Handbook is updated annually, and includes any supplementary documents issued throughout the year. A reference to the Cambridge Handbook means the most recent issue available on Cambridge's websites.
Cambridge ICE	Cambridge International Certificate of Education.
UK **Cambridge IGCSE**	Cambridge International General Certificate of Secondary Education. The international version of the GCSE – GCSEs are national qualifications usually taken by students at around the age of 16 in England.
UK **Cambridge IGCSE (9–1)**	As above but this qualification is available only in zone 3.
Cambridge International AS & A Level	The international version of the AS/A Level. The AS/A Level is a national qualification usually taken at age 16 to 18 in England. For details of assessment approaches for Cambridge International AS & A Level, see section 2.5.2.

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Cambridge International Education	Cambridge International Education is the name of our awarding body and a part of Cambridge University Press & Assessment, which is a department of the University of Cambridge.
Cambridge International School	The external brand status we give to schools that meet our registration quality standards and criteria to successfully register with us and offer our programmes and qualifications. A Cambridge International School can either work with us directly or through a Cambridge Associate.
Cambridge International School – also approved to offer Cambridge programmes online	A centre that delivers Cambridge programmes to some students at its physical premises and to others fully or mainly online. All students, whether studying in person or remotely, are registered with the school and sit their exams at the centre's physical premises.
Cambridge International School – registered as online	A centre that delivers Cambridge programmes for students remotely. A fully online centre has no traditional school campus but may have physical premises where students occasionally meet for extra-curricular or sporting activities. Most of the teaching and learning takes place online. Candidates register to sit their exams as private candidates at a Cambridge exam venue local to them.
Cambridge International School – registered as online (with exam venues)	A centre that delivers Cambridge programmes for students remotely. A fully online centre has no traditional school campus but may have physical premises where students occasionally meet for extra-curricular or sporting activities. Most of the teaching and learning takes place online. The centre is approved to run its own exam venues. Candidates can either be entered for exams directly and sit exams as regular candidates, or alternatively as private candidates at other Cambridge exam venues not connected to the online school.
Chk **Cambridge Lower Secondary Checkpoint**	Assessments available in English, English as a Second Language, Mathematics, Science and Global Perspectives, specially designed for candidates who are beginning courses leading to Cambridge IGCSE or Cambridge O Level exams in these subjects. They are designed for candidates of approximately 14 years of age. Cambridge Lower Secondary Checkpoint assesses skills at the end of stages 7 to 9 of the curriculum for English and English as a Second Language, and the curriculum content of stage 9 of the curriculum for Mathematics and Science.
Cambridge O Level	GCE Ordinary Level. Cambridge O Level is an internationally recognised qualification equivalent to the General Certificate of Secondary Education (GCSE) in England.

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Chk **Cambridge Primary Checkpoint**	Assessments available in English, English as a Second Language, Mathematics, Science and Global Perspectives that provide assessment based on the learning objectives within the Cambridge Primary curriculum frameworks. They are designed for candidates of approximately 11 years of age and cover all major areas of learning in the first years of an international secondary education. Cambridge Primary Checkpoint assesses skills at the end of stages 4 to 6 of the curriculum for English and English as a Second Language, and the curriculum content of stage 6 of the curriculum for Mathematics and Science.
Cambridge University Press & Assessment	Cambridge University Press & Assessment is a non-teaching department of the University of Cambridge. They exist to further the University's mission 'to contribute to society through the pursuit of education, learning and research at the highest international levels of excellence'. Cambridge International Education is part of Cambridge University Press & Assessment.
Candidate	A person who has been entered for an assessment.
Candidate Data	Candidate Data means personal data and, in some cases, special category (sensitive) personal data, as defined in the UK General Data Protection Regulation (GDPR) and Data Protection Act 2018 which relates to a candidate.
Candidate Results Service	A service that gives your candidates access to their results directly via a secure website. Centres can control which of their candidates have access to the site and what they can view through the 'Administer Exams' page on Direct.
Centre	In our operational communications, such as the Cambridge Handbook, we use 'centre' as an overarching term to refer to any type of organisation that has met our registration quality standards and criteria to successfully register with us to offer our programmes and qualifications and make entries for our exams. This includes Cambridge International Schools, Cambridge Associates and Associate centres.
Centre name	The name of a centre, Cambridge Associate or Associate Centre.
Centre number	The five-character code given to a centre, Cambridge Associate or Associate Centre.
Centre status	Centre status is awarded to a school, institution or organisation once it has been approved by and registered with Cambridge as a centre. Cambridge can withdraw this status in line with the conditions of this handbook and the centre's Agreement with Cambridge.
Certificate	A Cambridge certificate records and confirms a candidate's final results.
Certifying statement	An official document issued by Cambridge to show the grades achieved by a candidate in a particular series. Cambridge can send certifying statements at any time to any address, including educational institutions, as long as the original certificate has been issued. Candidates can apply for certifying statements or centres can apply on their behalf.

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Component	A component is part of or a section of the subject exam. An individual syllabus usually has several components. A component is sometimes referred to as a paper.
Component number	The two-digit number allocated to each component of a syllabus.
Coursework Assessment Summary Form **Oral Examination Summary Form** **Speaking Examination Summary Form** **Working Mark Sheet**	These forms should be used when assessing candidates' work in coursework and speaking test components. Depending on the component, you need to complete a Coursework Assessment Summary Form, Working Mark Sheet, Speaking Examination Summary Form, or Oral Examination Summary Form. The forms must show the marks of all candidates entered for the component and must be sent with the samples. For some components you also need to complete an Individual Candidate Record Card for each candidate. Visit the samples database (www.cambridgeinternational.org/samples) to check which forms are required for specific components and to access interactive copies of the forms.
Coursework (Examined)	A component for which the candidate produces work over the course which is assessed by us.
Coursework (Moderated)	A component for which the candidate produces work over the course which is assessed in the centre and moderated by us.

Chk Diagnostic feedback	Comprehensive feedback on a learner's strengths and weaknesses in the key curriculum areas of Cambridge Primary Checkpoint and Lower Secondary Checkpoint – English, English as a Second Language, Mathematics and Science. The feedback helps candidates understand more about their strengths and weaknesses in these subjects.
Digital File Despatch	Digital File Despatch is where we upload confidential materials, pre-release materials and early question papers as digital files, instead of sending printed copies, once centres have made their final entries.
Direct	Direct is a secure website for the direct submission and transfer of data and other information between centres and Cambridge. It is used by Cambridge exams officers to manage exam entries, download results and carry out other key administrative tasks. www.cambridgeinternational.org/direct
Direct online entries	A secure, quick and easy online system for making and submitting entries and amendments.
Enquiries about results	Services available to centres after the release of results if they want to have a candidate's script reviewed or their candidates' coursework re-moderated. See section 6.3 for details.
Entries	The candidates a centre has entered for a Cambridge qualification in a particular series.
Equalities laws	The UK Equality Act 2010 or any statutory successor and/or equivalent legislation in an applicable jurisdiction.

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Estimated entries	An approximation of the number of candidates a centre will enter for assessments.
Exams officer	The person appointed by the Head of Centre to act on behalf of the centre, with specific responsibility for the administration of Cambridge exams. The Head of Centre may also be the exams officer.
Fees	Sums payable by the centre or by the Cambridge Associate to Cambridge, the amounts of which are specified in the relevant fees list, and any fees specified in the Associate Agreement.
Fees list	The official listings published from time to time by Cambridge, detailing its fees.
Forecast grade	The grade a teacher expects a candidate to achieve for a syllabus.
Full Centre Supervision	A specific type of supervision for candidates. For a full definition see the 'Key Times and Full Centre Supervision' section.
NEW Global Listening	A service to allow centres to access and download audio files for listening exams via My Cambridge.
GMT	Greenwich Mean Time – an absolute time reference that does not change with the seasons.
Group award	An award given to a candidate who has studied and passed assessments from a specified number of subject groups. Examples are Cambridge ICE, a group award for Cambridge IGCSE, and the Cambridge AICE Diploma, a group award for Cambridge International A Level.
Head of Centre	The Head of Centre is the person who has been appointed by the Responsible Person as the head or principal of the centre.
Intellectual property rights	All intellectual property rights throughout the world for the full term of the rights concerned, whether or not registered and whether or not registrable, including copyright, database rights, patents, rights in inventions, know-how and technical information, design rights, design patents, registered designs, trade marks (including business and brand names, domain names, devices and logos) and the right to apply for any of the foregoing anywhere in the world.
Internally assessed mark	A mark awarded by the centre for an internally assessed coursework or speaking test component.
Invigilator	A suitably qualified person, sometimes referred to as a supervisor, who is appointed by the Head of Centre to be responsible for the proper conduct of a particular exam in line with Cambridge regulations. Invigilators work closely with and often report to the exams officer.
UK Key Time	A time, defined by the location and country of a centre, specified by Cambridge, when all candidates taking timetabled exams must either be in an exam or under Full Centre Supervision. The Key Time will always be expressed as GMT/UTC. You can find your Key Times at www.cambridgeinternational.org/keytimes
Malpractice	Malpractice is any action that breaks our regulations and potentially threatens the integrity of our exams and certification.

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Marks	The total score or individual points given by an examiner.
Moderation	The process to bring the marking of an internally assessed component to an agreed standard in all participating Cambridge centres.
Multiple-Choice Answer Sheet	Form used by candidates to answer multiple-choice questions.
My Cambridge	A 'single sign-on' service which allows you to access services provided by Cambridge using one set of login details.
Non-coursework test	A component which is administered by teachers or examiners at the centre as an exam within a time period specified by us. This component is internally assessed by teachers at the centre and then externally moderated by us.
Online Learning Area	The Online Learning Area (www.cambridgeinternational.org/learningarea) is where you can access all professional development training for teachers and exams officers.
Option code	A code that indicates the combination of components a candidate is taking. Option codes are specific to each syllabus, series and administrative zone. Option codes are shown in the Cambridge Guide to Making Entries.
Premises	Places which are available to a centre, Cambridge Associate or Associate Centre, and which are used for the purposes of exam administration.

Priority results	A statement of results we send directly to a candidate's chosen educational institutions or employers on the day results are released. The candidate applies for this using Results and Certificates – Form 9.
Private candidate	A candidate taking Cambridge exams who is not a registered student with your centre.
Qualification	A certificated award made by Cambridge to students to demonstrate their achievement.
Responsible Person	The Responsible Person is the person legally responsible for an institution to offer Cambridge assessments and exams. They are responsible for carrying out their duties in line with the Agreement and this handbook, whether or not they have delegated the duties to the Head of Centre or to any other person.
Results	The outcome issued to a candidate after they have completed a component and/or combination of components which together form a valid syllabus qualification.
School Support coordinator	The designated person at a centre who is responsible for creating and maintaining users of the School Support Hub. They also manage access to the Cambridge Primary and Lower Secondary support sites (if required).
Script	A candidate's response to a whole question paper or component.
Secure Exchange	Secure Exchange is available for some syllabuses that require internally assessed samples to be digitally transferred to us.

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Series	A group of exams in the same range, for example, Cambridge IGCSE and Cambridge International AS & A Level, with the same closing date for entries and timetable period. A series is identified by a month and year, for example June 2025.
Session	A period in a day in which an exam takes place, which is either in the morning, afternoon or evening. The evening session only applies to centres in administrative zones 4 and 5.
Special consideration	A post-exam adjustment made to a candidate's mark, by Cambridge, to make allowances for any adverse circumstances, for example illness, bereavement or temporary injury.
Special educational needs	This term refers to candidates who have significantly greater difficulty in learning and accessing assessments than the majority of candidates of the same age. It includes candidates who have sensory impairments, physical needs or medical conditions who require additional/specialist support and/or adjustments in order to access learning and assessments.
Statement of entry	A document showing a candidate's details and the entry options the candidate has been entered for.
Statement of results	A document showing a candidate's details and the syllabus grades they have been awarded.
Submit for Assessment	Submit for Assessment is available for some syllabuses that require marks, samples and forms for some internally assessed and examined components to be sent to us digitally.

Syllabus	A complete description of the content, assessment arrangements and performance requirements for a qualification. A course leading to an award or certificate is based on a subject syllabus.
Syllabus number	The four-digit number allocated to each syllabus.
Teacher-examiner	A teacher-examiner is someone selected by the centre to administer and assess speaking tests. The teacher-examiner should normally be a teacher at your centre. Where this is not possible and it is necessary to look for someone outside the centre, select someone who is fluent in the target language, preferably with recent and relevant teaching experience and with experience of conducting other speaking tests. The person appointed must be given the opportunity to familiarise themselves with the requirements of the speaking tests before conducting any tests.
Timetable deviation	Arrangements proposed by the Head of Centre to resolve any timetable clashes.
UCAS	University and Colleges Admissions Service.
UTC	Coordinated Universal Time – the primary standard by which the world regulates clocks and time.
Venue	A location where assessments are taken.
Verification of results	A service offered by Cambridge if a third party, such as an employer or university, wants to verify results we have issued. The third party or candidate applies for this service using Results and Certificates – Form 8.

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Administrative forms

The majority of our administrative forms are available from the 'Exam administration' area of the Cambridge website: www.cambridgeinternational.org/forms. The name of the form tells you which phase of the Cambridge Exams Cycle it relates to.

You can access special consideration forms from the 'Support Materials' section of Direct. The forms you need to send with your coursework and speaking test samples are in the samples database (www.cambridgeinternational.org/samples).

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ENGLISH LANGUAGE

Paper 9093/11
Reading

Key messages

- Candidates need to ensure that they read a wide range of material from a diverse range of sources such as advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.
- Candidates need to demonstrate knowledge and understanding of the linguistic elements and features of texts such as parts of speech/word classes, vocabulary, figurative language, phonology, morphology, rhetorical devices, voice, aspect, tense, modality, narrative perspective, word ordering and sentence structure, paragraph and text-level structure, formality/informality of register, pragmatics.
- Candidates should develop an intimate knowledge and understanding of the conventions and discourses associated with a diverse range of genres, styles and contexts, enabling them to respond reflectively, analytically, discursively and creatively, as is appropriate to the task or context.
- For **Question 1(a)**, the accompanying instructions and text provide the context and background information to guide the candidates as they produce their directed response. Candidates should use these to make carefully considered choices of appropriate lexis, register and tone to suit the task set and ensure they achieve the highest possible standards of accuracy and expression in their writing.
- For **Question 1(b)**, candidates need to ensure they compare the form, structure and language of the original text and their own, with a clear emphasis on selecting elements from both texts that may be analysed to demonstrate how writers' stylistic choices relate to audience and shape meaning.
- For **Question 2** candidates need to comment on the form, structure and language of a text. They are required to identify characteristic features of the text, relate them to the meaning, context and audience of the writing, organise information in their answers, and write using clear and appropriate language.
- A secure degree of technical accuracy – especially in the use of spelling, punctuation and tenses – is required at this level.

General comments

Candidates accessed and, to differing degrees, engaged with both texts well. The rubric was generally understood, with only a few candidates omitting either a part of a question or a full question. There were some brief responses to **Question 1(a)**. Candidates are required to write between 150 and 200 words. While there is no direct penalty for failing to adhere to this requirement, this is an aspect of the response's relevance to purpose. Candidates should remember that their work is marked for task focus and relevant content as well as expression and accuracy. Largely speaking, though, the paper was handled with understanding and competence. Only a few responses showed a lack of the language skills necessary for text analysis. This session, only a few candidates seemed to struggle to manage their time appropriately; such candidates consequently tended not to complete their last response.

Specific language features were generally well understood, but candidates must ensure that the features they identify are actually present in the passage and that they use specific examples of language use to support the identification of those features and link them to effects created. Not all candidates clearly understood the need to make precise connections between language features and their contribution to the full effect of the passage.

Question 1(a) is a directed response task. Candidates need to follow the instructions carefully to produce a written response informed by language, style and structure to fit a specific form, purpose and audience – in this session, the original text was taken from an information leaflet about beekeeping. Their reworking (or recasting) of the original text should incorporate recognisable conventions of the text type identified in the instructions; in this session it was the text for a speech opening to be given to a local school community (150–200 words) about keeping bees. Careful consideration of the target audience is required. Candidates

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are expected to write clearly, accurately, with relevant content, and effectively for the prescribed purpose and audience.

A good working knowledge of linguistics is indispensable in responding to **Question 1(b)**, where candidates are required to compare the text produced for **1(a)** with the given text analysing form, structure and language. Here, candidates are assessed for their ability to demonstrate comparative understanding of texts, with clear reference to characteristic features and comparative analysis of form, structure and language and how a writer's stylistic choices relate to audience to shape meaning. It is very important that candidates employ some form of comparative approach in their response to **Question 1(b)**. A topical approach guarantees continuous comparison in which a conclusion can be used to emphasise the essential similarities and differences between the two texts. Those who adopted a topical approach tended to be the candidates who demonstrated the most comprehensive linguistic analysis. This series, only a few candidates compared the given text for **Question 1** with that given for **Question 2**, generally writing their comparative commentary after writing their directed response. These candidates did not respond appropriately to the **Question 1(b)** text analysis task.

In **Question 2**, a sound knowledge of linguistics is again required as candidates are assessed on their ability to demonstrate understanding of a text in terms of meaning, context and audience with reference to characteristic features, and their ability to analyse form, structure and language.

Quite a few candidates did not show understanding of the need to make precise connections between language features and their contribution to the full effect of the given text.

Less successful responses could often have been improved through more precise use of language to link evidence with explanatory comments; phrases such as 'allows the reader to think' and 'this helps the readers to imagine' cannot be considered useful text analysis.

Comments on specific questions

Question 1

(a) Candidates were asked to read the text taken from an information leaflet about beekeeping. They were then required to write the opening text of a speech about keeping bees to be given to a local school community as if they were a beekeeper.

The characteristic features and conventions of a speech opening were adopted, and most responses showed clear understanding of the text. Most candidates acknowledged the directions of the rubric in part and were prompted by the contents of the text, addressing their speeches to a school community of students and/or parents and/or teachers.

Detailed responses showed close attention paid to the directive *Write the opening*…, and were structured accordingly with an effective opening (usually expressing gratitude in present tense) and an effective closure which provided a springboard for the rest of the speech, often in the subjunctive mood. Clear and effective responses paid attention to the point of view (a beekeeper), and this was evident in their introductions: 'my name is… and I have been a beekeeper for (xx) years'. Such responses also showed attention paid to the implicitly personal nature of the speech and its implicit purpose – to inform – although many responses simply emulated the persuasive style of the information leaflet.

Stronger responses generally addressed the audience respectfully, acknowledging both students and adults. They clearly identified the speaker's profession as a beekeeper and often included a brief explanation of the role. Many responses effectively engaged the audience early on by posing a question such as 'Who likes honey?' or by seemingly prompting a show of hands with queries like 'Does anybody here know what a hive is?'

The main body of the speech openings in these responses typically focused on explaining what beekeepers do in their important mission to keep bees safe and healthy. Some responses referred to swarming as a key opportunity for beekeepers to collect bees and transport them to a safe location. Occasionally, candidates mentioned the beekeeper wearing protective clothing, reinforcing the message that it is safe to handle bees with the right precautions.

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Lists were often shortened to suit the spoken form, with candidates usually naming just two types of flowers, most often sunflower and one other less common variety, which helped maintain clarity for both speaker and audience. Bee-related puns were used sparingly; when included, they were generally effective, for example, 'bee-kind to our planet', which appropriately emphasised the insect's ecological value.

The second half of many speeches shifted focus to actions students could take to help save bees. Common examples included promoting initiatives like 'Adopt a Beehive' or suggesting that families offer spare outdoor space for siting a hive. Candidates often referred to the first line in the final paragraph – *Honey bees have been on Earth for some 30 million years, but it is only in the last 5000 years* – of the source material to include fun facts, enhancing the appeal of the speech.

Most candidates avoided discussing the risk of bee stings, likely recognising that this might discourage younger students. The opening sections of the speech usually concluded effectively, either with an invitation for the audience to ask questions or a clear signpost of what was to come, for instance, 'Let me now tell you more about the ways you can help in our cause.'

Most candidates paid careful attention to the audience and the context of the piece, adopting an appropriate, modified formal register and a respectful tone whilst employing first, second and third person at various points throughout. Most candidates adapted material from the source text, including the factual details (though not in the same way as mentioned above) *pollinating one third*, *30 million years* and *last 5000 years*, and the many references to plants. Candidates engaged their audiences by employing second person and rhetorical questions, e.g. 'so how can you help in saving honey bees?' and triadic structure, 'flowers, vegetables and trees'. The voice, passion, empathy and agenda of a beekeeper in ensuring the survival of honey bees was captured by one candidate in the sentence, 'Honey bees might be small but, together, they carry one of the world's most important tasks on their backs.'

Many weaker responses offered a summary of the extract, drifted from the focus of the question and original text or quoted large amounts from the original text, which was rarely justified. They often simply listed pieces of information presented in the article without much attempt to shape it to the requirements of the task, especially regarding form, purpose and register. Many candidates failed to copy words accurately that were actually provided in the text, such as *pollination* and *environment*. Weaker responses often employed possession in common plural nouns. This was typically the case with bees ('bee's'), the spelling of which was, again, provided in the text. There were also many instances of unnecessary commas before most coordinating conjunctions. Expressions that did not flow easily included 'Bees grow more plants' and 'Bees are used to make honey'.

Specifically, these responses often began with casual salutations and frequently included multiple bee-related puns; for example, 'bee-utiful flowers' was especially common. They tended to list all the flowers and 'flowering herbs' mentioned in the source text, as well as all the suggested actions the community could take to help save bees. These lists were typically presented without explanation or justification, offering no indication of the relative importance of each action. As a result, activities such as reporting a swarm were presented as equally significant as more impactful efforts like improving communal spaces through the planting of wildflowers.

Striking the balance between showing understanding of the text and crafting an effective response is the key to this question and the tendency was perhaps to be a little too safe. It is important for candidates to be aware that understanding is not necessarily demonstrated by rearranging sections of the given text. The most effective writing often emerged towards the end of responses, once candidates freed themselves from the constraints of systematically addressing the text.

Most of the candidates abided by the guidelines concerning the length of their responses (150–200 words). Several candidates wrote considerably shorter pieces that did not best suit the form and purpose specified.

(b) Candidates were asked to compare their speech opening with the text from the information leaflet, analysing form, structure and language.

To do well in this task, candidates need to analyse form, structure and language and to directly compare different approaches and features in the two texts available to them, i.e. the text given and the one that they have just created. An integrated approach is more effective for this type of

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comparative task than dealing with each text separately. Where textual evidence is selected, candidates should remember to offer clear analysis of how the writer's choices of form, structure and language are related to audience and shape meaning.

Most candidates adopted the framework of the rubric in their responses, comparing and commenting on each aspect in turn. Many responses lacked supporting evidence in their comparisons. It is advised that candidates focus on the difference in formality, tone and registers, and collaborate language with form and structure to give a more robust response in terms of their analysis.

Generally, stronger responses included appropriate and accurate critical terminology to link evidence with explanatory comments on the effects created by the writers of the original passage and directed response. These stronger responses showed a clear distinction between a speech opening and its conventions and the conventions of an information leaflet; these responses regarded the given text and the candidate's own speech opening as of equal status and commented on both extensively. Such responses also offered a considerable amount of detail to illustrate points, showing a strong grasp of each feature and detail selected, and how each related to audience and shaped meaning. Furthermore, they noted that the primary purpose of the leaflet was both to inform and to persuade the audience to become involved. They also noted that the leaflet targets a significantly larger audience than other formats and is primarily intended for adults, as indicated by references to fundraising and the donation of outdoor space. Beekeeping is promoted as a profession, and it is possible that a young person might find the content intriguing enough to consider it as a potential career. The text is structured into smaller paragraphs with clear headings, helping readers to navigate to the sections most relevant to their interests and circumstances. The language used is relatively straightforward and accessible to most adults. Candidates commented that any technical terms, such as *swarming* or *pollination*, are made understandable by the context in which they appear. Finally, these responses considered that the leaflet makes a strong appeal to the public's ecological concerns, not only by emphasising the importance of saving bees, but also by promoting broader environmental restoration efforts, such as the replanting of wildflower meadows. The best noted that *Invite a beekeeper to visit*…, the final sub-heading, effectively contextualised the directed response task.

Comparative points in limited responses were often straightforward with little attempt to provide evidence from each text or to analyse the features identified. These responses were often brief, focused more – occasionally entirely – on the extract than on the directed response, did not compare 'like with like' and tended to summarise content rather than to analyse comparatively, with few or no supporting examples from the texts. They were often very general, showing little awareness of how writers' stylistic choices relate to audience and shape meaning. Some candidates mainly listed the conventions of writing associated with the genres without reference to the texts; and merely pointed out the variety of sentence types or length of paragraphs without any reference to effect. Many weaker responses took a reflective commentary approach – a requirement of Paper 2 – when analysing their own writing, often referring to what they could 'done better' which is not a requirement of the task. Weaker responses showed lack of precision with use of linguistic terminology; frequently, for example, reference was made to high or low register (rather that formal, informal or modified formal) and high, middle or low lexis (rather than high frequency or low frequency lexis).

Specifically, in respect of **form**, many responses offered basic comments: 'one is an information leaflet, and the other is a speech' was usual. Clear and effective responses addressed some of the conventions of each text, linking such conventions to purpose, audience and language. Thus, the conventional use of a boldfaced title, italicised subheading, boldfaced subheadings and 'call to action', from the point of view of the advocate(s) of the 'Adopt a Beehive' scheme in the information leaflet informed, persuaded and/or advised a 'UK based' and/or 'broad, adult audience' because of its implied reference to home ownership – *if you have the space*… – and its directive to *encourage your own local authority*…. Responses often began with a conventional personal introduction and/or a call to action, written from the point of view of a beekeeper. This approach was used to inform, persuade, or advise a mainly young audience of students, although parents and teachers were often included as well. The effectiveness of this approach lay in several features: the initial address named the school community directly; credibility was established by referring to the beekeeper's years of practical experience; the topic was clearly introduced at the outset; some responses included a preview of the main points; and the language throughout was friendly and engaging. Candidates considered the register of each text, with the most effective responses comparing the modified formal and/or informal features of each. It was clear in effective responses

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that attention had been paid to the rubric in that there was recognition that the task involved writing the text for the opening of a speech. Such responses generally closed with an adverbial phrase, e.g. 'here's a list of ways you can help', and/or the hortatory subjunctive to indicate this: 'now, let's look at this in more detail…'.

In respect of **structure**, many responses this series were limited in that they simply itemised the paragraphs in each piece and discussed their lengths – often, at length. Such responses also discussed long and short sentences in a limited manner. However, clear and effective responses compared the ways in which the setting out of 'problem and solution' in an abbreviated 10-point list, in the leaflet, and the use of hypophora, in their own texts, governed the structure of each piece. Attention was paid to the closing sections of the leaflet (with its succession of rhetorical questions from *Why not give them a call*… to *Why not invite*…) and to the intriguing closure and effective springboard in their own texts.

For comments on **language**, comparisons were often formulaic. It was usual for candidates to respond in terms of logos, ethos and pathos. That said, candidates noted the use of use of factual and numerical detail in the leaflet (*pollinating one third*, *30 million years* and *last 5000 years*) and the inclusion of such details in their own texts 'to endorse credibility' and to outline 'the legitimacy' of the task of beekeeping and the 'serious' or 'urgent' tone of the project involved: 'to save honey bees from extinction' because they are 'diminishing at an alarming rate', despite the fact that 'they are vital to all food production'. With this in mind, several candidates commented on the secondary purpose of the information leaflet, noting the 'soft sell' tactic with its inclusion of a hyperlink and details about how 'adoption money' would be spent (one candidate noted the 'hybrid' nature of this text). In addition to register, candidates compared the uses of direct address, with effective responses commenting on the various ways in which number and person were employed (first, second and third) and how each of these were linked to purpose and content. Several candidates compared the mood(s) employed in each text, commenting on the use of declaratives within the body of the text and imperatives and conditionals in the subheadings, in the leaflet, and their own use of declaratives ('to provide information') and interrogatives ('to engage' and/or to provide structure). Several rhetorical features were compared: the tri-colons of the leaflet (*a park, a roundabout or a hanging basket* and *local group, schools and clubs*); the listing of *asters, and sunflowers, hollyhocks*… (usually, identified as asyndetic listing); the metaphor in *bee-magnets* and punning in *abuzz* was compared to their own usage of such features and linked to the friendly tone of each piece. Finally, the use of present tense in each text was compared because it provided 'a sense of immediacy'.

Candidates would be well advised to note that 'comparative' is the most discriminating skill in terms of reading and especially analysis, analysis that not only explains how a technique works generally but also how specific effects are created that relate to audience and shaping of meaning. Furthermore, responses would benefit from clear references to the relevant text; this is particularly important when following a topical approach.

Question 2

Candidates were asked to read an extract from a non-fiction book about snow. They were then required to analyse the text, focusing on form, structure and language.

Most of the responses began with an overview of the purpose and audience and commented on the descriptive and reflective nature of the excerpt.

Candidates appeared to really enjoy this text and there were many detailed and clear responses about the conventions of the **form**. Most candidates were able to comment on some of the conventional features of this extract from a non-fiction book. They commented on the bolded title and the word itself as an instance of Icelandic language. The 'unfamiliarity' of the noun was clarified by the italicised subheading, which provided a translation in the form of a simile. It was noted that the title of the extract appears later in the text as the title of a song by the band Sigor Rós; as such, this was identified as an instance of cataphoric referencing. Clear and effective responses identified the purpose and topic: to inform and entertain a broad audience about snow; the 'topic of snow was linked', in the text, 'to Icelandic culture': to song and language. Candidates identified quotations and factual details (such as references to singer/band names and dates) together with the reference to a meteorologist, Trausti Jónsson. These were seen as indicative of the non-fiction form in establishing credibility. Further, the writer's use of third person assisted in establishing an objective voice in the text.

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In terms of **structural** features, responses frequently displayed confusion about the organisation of the text, and a number of personal opinions were introduced inappropriately. Responses generally commented on the way in which the writer initially 'sets the scene' by a quotation from an early traveller, PC Headley, and some reference was made to the 'dreamy atmosphere' with its focus on 'silence'; the latter, in detailed/effective responses, providing a circular structure since the text ends on the noun *silence*. There were also comments on the abrupt transition from past to present tense and the changing 'atmosphere' of Iceland, encapsulated by the short sentence *Yet the glaciers are vanishing* and the transition in the various metaphors employed, from *barely perceptible crackle of frost* and *howling* to *the throbbing bass* and *elfin […] vocals*. Other features of structure included the reference back to the title in the third paragraph with *Hundslappadrifa*'s cultural resonance as a unique entity of snow: its size (*as big as dog's paws*), its texture and comfort (*soft* and *blankets*) and its ability to bring joy implied through, *Children are glad….*

In respect of **language**, and in addition to the above, reference was made to 'personification' in *tongues of ice*, but comments were often in need of development; furthermore, personification was not clearly understood. Comments on language features were generally not developed. Reference was made to the form, structure and language of music, but little was made of the impact of auditory imagery, apart from *Björk exploded*, suggesting her 'immediate impact' on the music scene. Responses commented on the writer's use of indigenous language to establish credibility. Several candidates commented on the beauty of the language of the final paragraph with its encapsulation of *musical notes*, *flakes falling* and technology and the way in which they recede to *silence*.

In summary, stronger responses demonstrated a clear engagement with the structure of the text, particularly in relation to the opening paragraph. Candidates recognised that this section plays a crucial role in introducing the main idea, as meaning is constructed through the reader's interpretation of the contrast between the initial silence described by Headley and the subsequent rise in tourism. This tourism, prompted by a desire to escape the modern world, is later ironically mirrored by the sounds of Icelandic indie bands and singers, sounds that attempt to replicate the now-absent *crackle of frost* as the glaciers melt. Some of these stronger responses also showed an appreciation of the cyclical structure of the extract, identifying how the concluding paragraph returns to the theme of silence. The image of the snow ceasing to fall allows the microphone to capture only *silence* once again, creating a thoughtful and effective structural echo.

In addition, stronger responses paid close attention to the language of the opening paragraph, noting the evocative use of words such as *exhilaration* and the idiomatic expression *drinking in the sunlight*. These descriptions of the natural world were often linked to later metaphoric representations, such as *musical notes and flakes falling* (as above) and the Icelandic words for different kinds of snow (e.g. *bright*, *calm*), which were understood as suggesting a direct connection between snowfall and the creation of music. This idea was also recognised in the metaphor of the *otherworldly orchestra [that] fades to a soft and dusty patter*. They also noted the contrast between the lyrical, descriptive passages and the stark simplicity of a sentence like *Yet the glaciers are vanishing*. This contrast was seen to create emotional impact and shift the tone.

Some responses reflected on the role of music in the extract, suggesting that lyrics do not need to be fully understood, or even carry clear meaning, to be appreciated. Others concluded that the writer's main message is environmental: highlighting the impact of climate change as the driving force behind the melting glaciers.

Weaker responses usually struggled to make more than a few disparate observations about textual features with correct use of terminology, identification of an apt example and some effort to describe (if not explain) a direct effect created. Weaker responses tended to take a more literal and surface-level approach to the text. These responses often proposed that the intended audience was primarily people considering a holiday to Iceland or fans of indie music, without exploring deeper or more nuanced interpretations. Such responses typically focused on extracting factual details to support the idea that the writer's main purpose was to inform, often pointing to the use of third-person pronouns and the inclusion of proper nouns, especially the names of bands and singers. While many noted the use of the verb *exploded* to describe Björk's rise to fame, and generally understood that this suggested a sudden and impactful emergence, they tended to stop at this observation rather than considering how the language contributed to the wider themes or tone of the piece.

Furthermore, such weaker responses often described style, mood and vocabulary as having 'positive connotations' or 'negative connotations', with little further elaboration or definition. Similarly, a range of precisely constructed language effects were sometimes summed up as 'creating an interesting image' or 'to paint a picture'. It is important that candidates use precise terminology. These weaker responses listed techniques with no reference or example given or explanation.

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Basic responses offered very generalised comments. These responses identified some language features but offered minimal analysis. Such responses tended to summarise the contents of the text, generally at great length.

Selection of evidence by way of quotation was not always expertly used in these responses, with some candidates quoting at far too great a length or merely referring to a range of lines.

Quotation from the text should always be precise, as concise as possible and linked to explanatory comments. Candidates should be advised to: use quotations, evidence and evaluation to produce precise, meaningful commentaries; use appropriate language to link quotations and evidence with explanatory comments; and integrate quotations and evidence into a cohesive argument.

It would be helpful for candidates to be aware that the discriminator 'analysis is coherent and effectively structured' is a feature of the higher levels; a whole-text approach can often provide sophisticated and coherent analysis. A line by-line approach can lead to repetition of the same point, such as the author's use of alliteration. It is worth remembering that the same point cannot be rewarded twice.

Candidates would also be well advised to avoid dependence on too formulaic an approach to the analysis of Reading texts. The categorisation of elements of a text as representative of 'ethos' or 'logos' or 'pathos', for example, needs to be precisely developed by reference to exact effects of language. Candidates should also be advised that a glossary is not part of a given text but provided by Cambridge to provide definitions for words or phrases that may be unfamiliar, or that have specialised or technical meaning within the context of the document, and that consequently they have no need to comment on it.

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ENGLISH LANGUAGE

Paper 9093/12
Reading

Key messages

- Candidates need to ensure that they read a wide range of material from a diverse range of sources such as advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.
- Candidates need to demonstrate knowledge and understanding of the linguistic elements and features of texts such as parts of speech/word classes, vocabulary, figurative language, phonology, morphology, rhetorical devices, voice, aspect, tense, modality, narrative perspective, word ordering and sentence structure, paragraph and text-level structure, formality/informality of register, pragmatics.
- Candidates should develop an intimate knowledge and understanding of the conventions and discourses associated with a diverse range of genres, styles and contexts, enabling them to respond reflectively, analytically, discursively and creatively, as is appropriate to the task or context.
- For **Question 1(a)**, the accompanying instructions and text provide the context and background information to guide the candidates as they produce their directed response. Candidates should use these to make carefully considered choices of appropriate lexis, register and tone to suit the task set and ensure they achieve the highest possible standards of accuracy and expression in their writing.
- For **Question 1(b)**, candidates need to ensure they compare the form, structure and language of the original text and their own, with a clear emphasis on selecting elements from both texts that may be analysed to demonstrate how writers' stylistic choices relate to audience and shape meaning.
- For **Question 2** candidates need to comment on the form, structure and language of a text. They are required to identify characteristic features of the text, relate them to the meaning, context and audience of the writing, organise information in their answers, and write using clear and appropriate language.
- A secure degree of technical accuracy – especially in the use of spelling, punctuation and tenses – is required at this level.

General comments

Candidates accessed and, to differing degrees, engaged with both texts well. The rubric was generally understood, with only a few candidates omitting either a part of a question or a full question. There were some brief responses to **Question 1(a)**. Candidates are required to write between 150 and 200 words. While there is no direct penalty for failing to adhere to this requirement, this is an aspect of the response's relevance to purpose. Candidates should remember that their work is marked for task focus and relevant content as well as expression and accuracy. Largely speaking, though, the paper was handled with understanding and competence. Only a few responses showed a lack of the language skills necessary for text analysis. This session, only a few candidates seemed to struggle to manage their time appropriately; such candidates consequently tended not to complete their last response.

Specific language features were generally well understood, but candidates must ensure that the features they identify are actually present in the passage and that they use specific examples of language use to support the identification of those features and link them to effects created. Not all candidates clearly understood the need to make precise connections between language features and their contribution to the full effect of the passage.

Question 1(a) is a directed response task. Candidates need to follow the instructions carefully to produce a written response informed by language, style and structure to fit a specific form, purpose and audience – in this session, the original text was an extract from a book by an explorer and adventurer. Their reworking (or recasting) of the original text should incorporate recognisable conventions of the text type identified in the instructions; in this session it was the text for a section of a leaflet (150–200 words) advising travellers of the landscapes that they will encounter in Suriname. Careful consideration of the target audience is required.

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Candidates are expected to write clearly, accurately, with relevant content, and effectively for the prescribed purpose and audience.

A good working knowledge of linguistics is indispensable in responding to **Question 1(b)**, where candidates are required to compare the text produced for **1(a)** with the given text analysing form, structure and language. Here, candidates are assessed for their ability to demonstrate comparative understanding of texts, with clear reference to characteristic features and comparative analysis of form, structure and language and how a writer's stylistic choices relate to audience to shape meaning. It is very important that candidates employ some form of comparative approach in their response to **Question 1(b)**. A topical approach guarantees continuous comparison in which a conclusion can be used to emphasise the essential similarities and differences between the two texts. Those who adopted a topical approach tended to be the candidates who demonstrated the most comprehensive linguistic analysis. This series, only a few candidates compared the given text for **Question 1** with that given for **Question 2**, generally writing their comparative commentary after writing their directed response. These candidates did not respond appropriately to the **Question 1(b)** text analysis task.

In **Question 2**, a sound knowledge of linguistics is again required as candidates are assessed on their ability to demonstrate understanding of a text in terms of meaning, context and audience with reference to characteristic features, and their ability to analyse form, structure and language.

Quite a few candidates did not show understanding of the need to make precise connections between language features and their contribution to the full effect of the given text.

Less successful responses could often have been improved through more precise use of language to link evidence with explanatory comments; phrases such as 'allows the reader to think' and 'this helps the readers to imagine' cannot be considered useful text analysis.

Comments on specific questions

Question 1

(a) Candidates were asked to read an extract from a book by an explorer and adventurer. They were advised that they worked for a travel agency that organises expeditions to remote locations for young adults and then required to write the text for a section of a leaflet advising travellers of the landscapes that they will encounter in Suriname.

The characteristic features and conventions of a leaflet section were adopted, and most responses showed clear understanding of the text. Most responses showed close attention to the rubric, recognising the point of view, as directed, in addition to some conventional features of the form and the advisory nature of the task. Most employed a title that embodied both a sense of place and of exoticism in the landscapes (for example 'Lustrous Landscapes of Suriname', 'Suriname's Forests: A Hidden Gem', 'The Last Refuge of Nature' and 'Surreal Suriname'). Responses were conventionally structured, employing subheadings and/or bullet point lists to advise young adults about features of the landscapes to be encountered. In clear and effective responses, such features included adaptations of the *calamitous cliffs*, the *ancient rocks*, the *gorge* with a waterfall, the *impenetrable forest*, the *tropical rainforest*, the *riverside camps*, the *gold mine* and the *mountainous […] peaks*.

Effective responses adapted elements of the original text to provide cautionary interjections about the dangers of the landscapes that might prove 'challenging for young adults': 'Travellers be warned, this expedition is not for the faint-hearted'. Reference was made to appropriate footwear ('wear sturdy shoes') and to 'protective clothing' (wear 'proper equipment and gear') and to insect repellents ('don't forget your bug spray'). These responses tended to use sub-headings to provide coherence (for example 'Wonderful Waterfalls'). In these stronger responses, there was precise selection of adjectives to describe aspects of the landscape ('verdant foliage', 'vertiginous slopes', 'precariously steep', 'sky-scraping trees'); visual ('a perfect sight to behold') and auditory imagery ('a sonic boom jolting your chest') was employed; furthermore, there was a focus on adventurous activities suitable to aspects of the landscape ('sketchy death-defying situation'); some referenced gold mines in a vein of eco-tourism ('despicable activities that defile the forest').

Candidates generally employed direct address, an 'upbeat' tone and present tense to engage and to provide a sense of immediacy: 'Are you tired of always visiting…'. Most candidates recognised

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the secondary purpose of the text, employing persuasive tactics such hyperbole ('you will gain the skills of a real explorer'), tricolon ('majestic landscapes, mountainous walks and exposed rock cliffs') and hypophora ('tired of the same, boring, over-hyped expedition locations?') Most candidates employed first-person plural in recognition of the point of view whilst appealing to the perceived, adventurous nature of young adults, searching for a unique experience: 'our team awaits your arrival' if you 'want to have the thrill of a lifetime'. A sense of excitement and adventure was embodied from the outset in one response by the employment of an imperative: 'Pack your bags!' Most of the leaflet sections closed with a call to action ('Join us now') or with the travel agency's contact details.

Many weaker responses offered a summary of the extract, drifted from the focus of the question (for example did not address *landscapes*) and original text or quoted large amounts from the original text in their directed response, which was rarely justified. They often simply listed pieces of information presented in the article without much attempt to shape it to the requirements of the task, especially regarding form, purpose and register.

In weaker responses, titles often prioritised the travel agency itself ('Eternal Expeditions'); bucket-list-like potential achievements were included ('Conquer the Devil's Egg', 'Mine for gold in Wild West territory'); remoteness was over-emphasised ('lose contact with the rest of the world') at the expense of vivid descriptions of natural features (ancient rock, biggest waterfall, shallow green swamps situated above sea level). Some of these weaker responses did not focus on the *landscapes* as directed in the question. Many weaker responses presented *slumbering dragons* in a literal rather than figurative sense; there were lapses in maintaining a travel agency's perspective, usually found in the leaflet's conclusion ('I do hope you guys have an unforgettable trip!').

Striking the balance between showing understanding of the text and crafting an effective response is the key to this question and the tendency was perhaps to be a little too safe. It is important for candidates to be aware that understanding is not necessarily demonstrated by rearranging sections of the given text. The most effective writing often emerged towards the end of responses, once candidates freed themselves from the constraints of systematically addressing the text.

Most of the candidates abided by the guidelines concerning the length of their responses (150–200 words). Several candidates wrote considerably shorter pieces that did not best suit the form and purpose specified.

(b) Candidates were asked to compare the text of their leaflet section with the extract, analysing form, structure and language.

To do well in this task, candidates need to analyse form, structure and language and to directly compare different approaches and features in the two texts available to them, i.e. the text given and the one that they have just created. An integrated approach is more effective for this type of comparative task than dealing with each text separately. Where textual evidence is selected, candidates should remember to offer clear analysis of how the writer's choices of form, structure and language are related to audience and shape meaning.

Most candidates adopted the framework of the rubric in their responses, comparing and commenting on each aspect in turn. Many responses lacked supporting evidence in their comparisons. It is advised that candidates focus on the difference in formality, tone and registers, and collaborate language with form and structure to give a more robust response in terms of analysis.

Generally, stronger responses included appropriate and accurate critical terminology to link evidence and explanatory comments on the effects created by the writers of the original passage and directed response. These stronger responses showed a clear distinction between a section of a leaflet and its conventions and the conventions of an extract from a book; these responses regarded the given text and the candidate's own speech opening as of equal status and commented on both extensively. Such responses also offered a considerable amount of detail to illustrate points, showing a strong grasp of each feature and detail selected, and how each related to audience and shaped meaning. In respect of the extract, stronger responses noted the expository writing to vividly describe exploration of a not well-known remote location with the purpose of engaging in extreme physical activities; the audience usually being young adventure travellers who themselves enjoy hazardous activities (climbing and abseiling); use of first person

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pronouns to vividly capture the author's direct experiences (*We hold our breath*); 'semi-formal' register mainly owing to the author's more personal and introspective comments (*speak to Helen*, *chapter of my baby's childhood*); appeal to the senses (*murky orange*); short sentences to create tension; the perspective that the author was not sufficiently physically and mentally prepared for his ordeal (*most remote and impenetrable forest*, *I was dying to get to something approaching civilization*, *a bleak start to the next few weeks in the interior*, *missing home desperately*).

Furthermore, stronger responses demonstrated a thoughtful comparison between the given extract and the directed response, as relevant, particularly in relation to purpose and audience engagement. They recognised the need to enthral the audience and pique their interest in a country they may not even know about or have previously considered travelling to. To support this aim, key pieces of advice were often presented in bullet points 'so they stand out' or 'cannot be missed', showing an awareness of how layout can aid communication. Some also argued that graphology can be employed to appeal to a younger audience, citing the use of bold and underlined text, or even 'a different font for title and sub-headings'. There was purposeful use of second-person pronouns, with one candidate commenting that this helped 'close the gap between experienced adventure traveller and aspirational young audience'. They commented that rhetorical questions were used effectively to entice the audience, such as 'Do you dare to venture forth into the remote interior of Suriname?' These were often followed by a clear call to action in the final sentence, including phrases like 'We strongly urge…', which gave the piece a confident and persuasive conclusion.

Comparative points in limited responses were often straightforward, with little attempt to provide evidence from each text or to analyse the features identified. In respect of the extract, weaker responses generally noticed the alliterative title *Forgotten Forest*; they argued that first-person pronouns place an emphasis on the 'narrator' and 'his own story and experiences'; they labelled much of the writing as 'descriptive' with little attempt to show how various effects were created, and attempted to characterise the content ('very beautiful and dangerous terrain'). Furthermore, they found the author's intention to be persuasive (neglecting the many indicators that he was regretful of his decision to go into the Forgotten Forest). These weaker responses often saw the intended audience of the extract as being 'young travellers'. In comparison with the directed responses, where relevant, candidates commented on the 'fast pace' of leaflets created via short sentences and paragraphs to 'energise' the reader (and 'mimic the author'); there was a high incidence of 'you' considered to appeal to and influence the decision-making of impressionable potential customers; such responses saw the use of the semantic field of enjoyment ('joy', 'elated' and 'fun') as 'the primary aim of young travellers'.

Weaker responses were often brief, focused more – occasionally entirely – on the extract than on the directed response, did not compare 'like with like' and tended to summarise content rather than to analyse comparatively, with few or no supporting examples from the texts. They were often very general, showing little awareness of how writers' stylistic choices relate to audience and shape meaning. Some candidates mainly listed the conventions of writing associated with the genres without reference to the texts, and merely pointed out the variety of sentence types or length of paragraphs without any reference to effect. Many weaker responses took a reflective commentary approach, a requirement of Paper 2, when analysing their own writing, often referring to what they could 'done better' which is not a requirement of the task. Weaker responses showed lack of precision with use of linguistic terminology, chronology was not always clearly understood and types of verb received little attention (present continuous, dynamic and stative).

Specifically, in respect of **form**, clear and effective responses addressed some of the conventions of each text, linking such conventions to purpose, audience and language. Thus, the conventional use of a boldfaced title and short subtitle together with the autobiographical nature of the extract, combination of first and third person, factual detail and explorer's point of view served to inform and entertain a broad, adult audience interested in exploration and adventure. In the leaflet text, the conventional use of a title, subheadings, lists, call to action and contact details together with the employment of first and second person and travel agency point of view served to inform, advise and entertain an audience of young people searching for a unique and adventurous 'get-away', or 'adventurers and thrill-seekers', as one candidate put it. Candidates compared the modified formal/semi-formal register of the texts and the ways in which these appealed to their respective audiences.

In respect of **structure**, In addition to comments on form, and in clear and effective responses, candidates commented on the ways in which the extract evoked 'curiosity': beginning with the title

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Forgotten Forest and continuing through various shifts in focus and tone from the 'abrupt', 'dramatic' and italicised, opening paragraph with its focus on the 'dangerous' or 'precarious' surroundings (implied by the noun *Rock!* and *a boulder swoops*) to 'calmer' but, often, 'gloomier' sections when the writer is recounting his frustrations – *the internet connection […] was poor / would have taken weeks of jungle hacking* –, his 'despondency' and 'regrets' (*missing home desperately*, *an unrepeatable chapter of my baby's childhood was slipping away*) and his environmental concerns (*energy companies prowl offshore, coveting*…). Candidates compared how they had created curiosity in their titles and how their focus and tone were dictated by the form and purpose of their pieces and, as such, although they included shifts in focus from informative to advisory, they were far more 'upbeat' in their 'soft sell' tactics. The paragraph sequencing of the extract with its 'temporal references' and 'time shifts', such as *After three weeks* and *our journey began* (though, often, referred to as chronological order), and its various shifts in tense from present to past, was compared to their own sequencing of information and advice (generally their use of subheadings and bullet points) and changes in tense. One candidate indicated that they had 'focused on sights rather than the perilous process of getting to those sights'. Some reference was made to the variety of sentence structures, in each, with the short sentences of the extract which, in some instances, added to the 'intensity' of the unfolding drama (taken from *We hold our breath*) being compared to short imperative and/or exclamatory sentences in their leaflet: 'Book now!'

For **language**, candidates commented on the vivid, sensory imagery of the extract, both visual and auditory. For some candidates, the writer created 'wondrous detail' a 'fantastical mood' in the metaphor *slumbering dragons*. For one candidate, the onomatopoeic *boom* evoked a 'death defying tone'. Candidates commented on the writer's use of alliteration and sibilance (*calamitous cliffs* and *sandy slop*) and how these, in addition to hyperbolic similes, such as *like a fly caught in a storm-blown web*, contributed to the 'entertainment' value and 'drama' of the extract. Candidates compared these rhetorical features to the ways in which they had employed visual imagery and hyperbole to suggest the variety of landscapes to be encountered in Suriname. For one candidate, the lush landscape of Suriname was a 'hidden gem'. For another, the 'fairy tale' landscape of Suriname was 'like heaven on earth'. For yet another, who had noted the writer's concern with both the flora and fauna of the region, the landscape came with 'bat sized mosquitoes' – the latter being employed to contrast the negative tones of the extract, with the positive ones of the leaflet. Finally, candidates commented on the variety of moods in the extract with attention being drawn to the interweaving of factual/numerical declaratives (*13 billion barrels of oil* and *with $10000 apiece*) to establish the writer's credibility. The moods of the extract were compared to their own (as above), with credibility established by reference to the travel agency's credentials (we provide 'professional tour guides') and contact details: 'Contact us at SurinameTravellersAgency@gmail.com.'

Candidates would be well advised to note that 'comparative' is the most discriminating skill in terms of reading and especially analysis, analysis that not only explains how a technique works generally but also how specific effects are created that relate to audience and shaping of meaning.

Furthermore, candidates' responses would benefit from clear references to the relevant text; this is particularly important when following a topical approach.

Question 2

Candidates were asked to read the text from an article about how scientists plan to build biocomputers to emulate the human brain.

They were then required to analyse the text, focusing on form, structure and language.

Most of the responses began with an overview of the purpose and audience and commented on the descriptive and reflective nature of the excerpt.

Most candidates had a clear understanding of some of the conventional features of the article's **form**. Clear responses commented on the bolded and 'telegraphic' title as being 'straightforward' or 'matter-of-fact'. Effective responses identified the 'shocking' or 'sensational' nuances of making *computers out of brain* and that this provided the initial 'hook', arousing the curiosity of a broad audience interested in the 'latest technological developments'. Such responses then commented on how the nuances of the title were clarified in the italicised subheading by explaining that *scientists borrow the performance of the brain for computing* but that a positive outcome for such a 'pioneering project' was not certain, as indicated by the stative verb in *they hope*. For most candidates, the writer's use of formal register conveyed in the use of third person, quotations from reputable/expert sources, data, and jargon was indicative of an objective article, the purpose

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of which was to educate, to inform and even to persuade. For a few candidates, subliminal 'bias' could be detected in the positive tone throughout and the inclusion of quotations from Thomas Hartung, whose aim was to brook 'any opposition' to OI by emphasising the *ethical and socially responsible* vision of the project.

In terms of **structural** features, most candidates commented on the short paragraph structure of the extract, including the one-sentence paragraph in which Hartung is quoted. The latter served 'to emphasise' the storage capacity of the human brain (*2500 terabytes*) and the 'scale' of the OI project in scientists' attempts to emulate such storage capacity in new computers. Effective responses focused on the ways in which paragraphs were sequenced in present tense, opening, topically, with the aspirations of scientists, then shifting to some contextualisation, then to 'technical aspects', then to 'potential benefits to the world' and closing on a reputable source to endorse the credibility of both the project and the article. For some, structural cohesion was considered to have been achieved, in the article, through the writer's employment of repetition at the beginning of paragraphs and throughout the text. They noted that 'scientists and researchers are mentioned' frequently.

In respect of **language**, and in addition to numerical data (linked to science and computing), several candidates commented on the jargon of the article, with one candidate identifying the telescoping of the noun *biocomputers*, and the verb *biocomputing* to provide an effective 'shorthand' for science/computer 'geeks'. The coinage of *organoid intelligence* and its abbreviation 'OI' served to embody the 'exciting' new development in the world of computing. Most candidates identified Hartung's use of tricolon in *fast, powerful, and efficient* which served to emphasise his aspirations for new computers. They also commented on Hartung's use of tricolon in *scientists, ethicists, and the public* which served to endorse his emphasis of *partnership*.

In addition, stronger responses commented on the impressionistic title, especially the phrase *make computers out of brain*; they noticed an optimistic tone (as above) expressed through *they hope* in both lines 3 and 24 (especially as a 'standalone' in the former instance); they also commented on the use of factual content that does not always 'overwhelm the reader', such as *1015 connection points* and *50,000 cells* in respect of the *brain organoids* because 'readers appreciate the human brain consists of many billions of cells'. Such stronger responses commented on instances of tech-related lexis (*silicon*, *transistors*), though the article's relatively little scientific jargon was considered to be a virtue as it might otherwise alienate general readership. They saw the use of third person helped cast scientists as 'higher level entities' who did 'mind-bogglingly innovative work'; these valued the comparison of the human brain's superior capacity (*wired completely differently*) to a *tiny chip* as illustrative of the complexity of the work being undertaken. There was consideration of the metaphor *a host of work* as understatement of what has yet to be accomplished and evaluation of the alliterative, plosive *building biocomputers* as a useful means to encapsulate the article's topic ('a pithy takeaway concept'). The effect of triadic structure *fast, powerful and efficient* was considered to succinctly characterise bio-computing; the rule of three *learn, remember – and perhaps even understand* was seen to serve as an effective segue into the final section of article, i.e. the ethical dimension of the issue.

Weaker responses usually struggled to make more than a few disparate observations about textual features with correct use of terminology, identification of an apt example and some effort to describe (if not explain) a direct effect created. These responses tended to take a more literal and surface-level approach to the text. They found the subject would 'fascinate' a general reader on basis that the audience is familiar with computers and 'we all' have a brain. These weaker responses noted that the sub-heading creates both 'certainty and uncertainty' that could 'confuse many readers'. Statistical information was considered as 'gives readers a solid base to research further the topic' and the article's 'high lexis appeals to intellectual people'. Some candidates questioned the veracity of the Hartang quotation *A community of top scientists has gathered to develop this technology . . . efficient biocomputing* and labelled it 'science fiction'. Often the single-sentence paragraph was 'designed to help the reader remember it'.

Furthermore, such weaker responses often described aspects of the text as having 'positive connotations' or 'negative connotations', with little further elaboration or definition. Similarly, a range of precisely constructed language effects were sometimes summed up as 'creating an interesting image' or 'to paint a picture'. It is important that candidates use precise terminology. These weaker responses listed techniques with no reference or example given or explanation.

Basic responses offered very generalised comments. These responses identified some language features but offered minimal analysis. Such responses tended to summarise the contents of the text, and they generally did this at great length.

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Selection of evidence by way of quotation was not always expertly used in weaker responses, with some candidates quoting at far too great a length or merely referring to a range of lines.

Quotation from the text should always be precise, as concise as possible and linked to explanatory comments. Candidates should be advised to use quotations, evidence and evaluation, to produce precise, meaningful commentaries; use appropriate language to link quotations and evidence with explanatory comments and integrate quotations and evidence into a cohesive argument.

It would be helpful for candidates to be aware that the discriminator 'analysis is coherent and effectively structured' and similar descriptors, are a feature of the higher levels; a whole text approach can often provide sophisticated and coherent analysis. Another consequence of taking a line by-line approach can lead to repetition of the same point, such as the author's use of alliteration. It is worth remembering that the same point is not be rewarded twice.

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ENGLISH LANGUAGE

Paper 9093/13
Reading

Key messages

- Candidates need to ensure that they read a wide range of material from a diverse range of sources such as advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.
- Candidates need to demonstrate knowledge and understanding of the linguistic elements and features of texts such as parts of speech/word classes, vocabulary, figurative language, phonology, morphology, rhetorical devices, voice, aspect, tense, modality, narrative perspective, word ordering and sentence structure, paragraph and text-level structure, formality/informality of register, pragmatics.
- Candidates should develop an intimate knowledge and understanding of the conventions and discourses associated with a diverse range of genres, styles and contexts, enabling them to respond reflectively, analytically, discursively and creatively, as is appropriate to the task or context.
- For **Question 1(a)**, the accompanying instructions and text provide the context and background information to guide the candidates as they produce their directed response. Candidates should use these to make carefully considered choices of appropriate lexis, register and tone to suit the task set and ensure they achieve the highest possible standards of accuracy and expression in their writing.
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- A secure degree of technical accuracy – especially in the use of spelling, punctuation and tenses – is required at this level.

General comments

Candidates accessed and, to differing degrees, engaged with both texts well. The rubric was generally understood, with only a few candidates omitting either a part of a question or a full question. There were some brief responses to **Question 1(a)**. Candidates are required to write between 150 and 200 words. While there is no direct penalty for failing to adhere to this requirement, this is an aspect of the response's relevance to purpose. Candidates should remember that their work is marked for task focus and relevant content as well as expression and accuracy. Largely speaking, though, the paper was handled with understanding and competence. Only a few responses showed a lack of the language skills necessary for text analysis. This session, only a few candidates seemed to struggle to manage their time appropriately; such candidates consequently tended not to complete their last response.

Specific language features were generally well understood, but candidates must ensure that the features they identify are actually present in the passage and that they use specific examples of language use to support the identification of those features and link them to effects created. Not all candidates clearly understood the need to make precise connections between language features and their contribution to the full effect of the passage.

Question 1(a) is a directed response task. Candidates need to follow the instructions carefully to produce a written response informed by language, style and structure to fit a specific form, purpose and audience – in this session, the original text was an article about making journeys on sleeper trains. Their reworking (or recasting) of the original text should incorporate recognisable conventions of the text type identified in the instructions; in this session it was the opening text for a brochure (150–200 words) advertising the launch of a company's new sleeper train journey. Careful consideration of the target audience is required. Candidates

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are expected to write clearly, accurately, with relevant content, and effectively for the prescribed purpose and audience.

A good working knowledge of linguistics is indispensable in responding to **Question 1(b)**, where candidates are required to compare the text produced for **1(a)** with the given text analysing form, structure and language. Here, candidates are assessed for their ability to demonstrate comparative understanding of texts, with clear reference to characteristic features and comparative analysis of form, structure and language and how a writer's stylistic choices relate to audience to shape meaning. It is very important that candidates employ some form of comparative approach in their response to **Question 1(b)**. A topical approach guarantees continuous comparison in which a conclusion can be used to emphasise the essential similarities and differences between the two texts. Those who adopted a topical approach tended to be the candidates who demonstrated the most comprehensive linguistic analysis. This series, only a few candidates compared the given text for **Question 1** with that given for **Question 2**, generally writing their comparative commentary after writing their directed response. These candidates did not respond appropriately to the **Question 1(b)** text analysis task.

In **Question 2**, a sound knowledge of linguistics is again required as candidates are assessed on their ability to demonstrate understanding of a text in terms of meaning, context and audience with reference to characteristic features, and their ability to analyse form, structure and language.

Quite a few candidates did not show understanding of the need to make precise connections between language features and their contribution to the full effect of the given text.

Less successful responses could often have been improved through more precise use of language to link evidence with explanatory comments; phrases such as 'allows the reader to think' and 'this helps the readers to imagine' cannot be considered useful text analysis.

Comments on specific questions

Question 1

(a) Candidates were asked to read an article about making journeys on sleeper trains. They were advised that they worked for a railway company and required to write the opening text for a brochure advertising the launch of the company's new sleeper train journeys.

The characteristic features and conventions of a producing persuasive and promotional brochure openings which focused on the launch of advertising the company's new sleeper train journeys were generally understood. Most candidates employed language typical of marketing material, using emotive vocabulary, rhetorical questions and positive adjectives to highlight the benefits of sleeper train travel. Phrases such as 'wake up in a new city', 'escape the hassle of flying' or 'travel greener, sleep deeper' were common, achieving the desired tone and register. Most responses were conventionally structured, employing subheadings and/or bullet point lists to advise young adults about features of the landscapes to be encountered.

There was a general consistency in register, with many candidates adopting a modified formal tone that reflected a serious business promoting its service to a target audience of experienced or regular travellers, particularly business clients, though some responses also referenced leisure travel and special excursions. Openings were often enthusiastic and eye-catching, with candidates supplying short, relevant titles such as 'Dream Destinations' (a pun on sleeper coaches), and subheadings like 'Book the train ride of a lifetime', which captured attention and set the tone for the rest of the piece.

Effective responses usually addressed the reader as early as possible, often simply through the use of the second person pronoun 'you'. They clearly identified and highlighted the most attractive features of sleeper trains. For example, many noted the promise of a comfortable night's sleep in beds, 'equivalent to those found in 5-star hotels'. The smooth, electric-powered nature of the trains was also referenced, presumably based on the assumption implied by the phrase *renewable energy*. Candidates described either the sleek, modern styling of the trains or their nostalgic appeal, reminiscent of the golden age of rail travel, such as the Orient Express-style 'red velvet seats lined with gold trim that elegantly invite you to take your seat'.

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These responses often appealed effectively to customers' environmental concerns, particularly their desire to reduce their carbon footprint. This was reflected in persuasive lines such as 'travel with a clear conscience […] only 20 kg of CO_2 released per journey'. Candidates also made a virtue of the panoramic experience offered by large windows, which allowed passengers to 'marvel at snowy peaks framed by a starry sky on a crisp Alpine night'.

Finally, stronger responses incorporated the sentiment of enjoyment expressed by Julia Senninger in the direct quotation *It's so much more fun*. This sense of pleasure was further supported by her reference to the opportunity to meet *new, interesting people*.

Many weaker responses offered a summary of the extract, drifted from the focus of the question (for example lacking focus on the *launch* of a new sleeper train) and original text, or quoted large amounts from the original text in their directed response, which was rarely justified. They often simply listed pieces of information presented in the article without much attempt to shape it to the requirements of the task, especially regarding form, purpose and register.

Weaker responses tended to focus heavily on listing destinations and types of travellers, often at the expense of developing a persuasive tone or promoting the specific benefits of sleeper train travel. Rather than highlighting the virtues of electric sleeper services, many took every opportunity to criticise air travel, frequently describing it as 'dirty', which sometimes resulted in an unbalanced or overly negative comparison.

Of these weaker responses, some candidates did not select an appropriate or persuasive name for the company they were representing. For example, 'Station Stripes' fails to clearly communicate the advantages or appeal of sleeper trains. Others produced advertising copy that lacked clarity or coherence, such as the line 'Listen to, NO! embrace the tranquillity', or the unfinished slogan 'Enjoy the miles and miles of open', which left the potential audience confused.

A few responses included content that was irrelevant to the task or lacked audience awareness. One candidate opened with an unnecessarily long historical overview of modes of transportation, while another described the target audience as 'the environmentally cautious', a phrase that unintentionally downplayed the urgency or conviction often associated with sustainable travel choices.

Striking the balance between showing understanding of the text and crafting an effective response is the key to this question and the tendency was perhaps to be a little too safe. It is important for candidates to be aware that understanding is not necessarily demonstrated by rearranging sections of the given text. The most effective writing often emerged towards the end of responses, once candidates freed themselves from the constraints of systematically addressing the text.

Most of the candidates abided by the guidelines concerning the length of their responses (150–200 words). Several candidates wrote considerably shorter pieces that did not best suit the form and purpose specified.

(b) Candidates were asked to compare the text of their leaflet section with the extract, analysing form, structure and language.

To do well in this task, candidates need to analyse form, structure and language and to directly compare different approaches and features in the two texts available to them, i.e. the text given and the one that they have just created. An integrated approach is more effective for this type of comparative task than dealing with each text separately. Where textual evidence is selected, candidates should remember to offer clear analysis of how the writer's choices of form, structure and language are related to audience and shape meaning.

Most candidates adopted the framework of the rubric in their responses, comparing and commenting on each aspect in turn. Many responses lacked supporting evidence in their comparisons. It is advised that candidates focus on the difference in formality, tone and registers, and collaborate language with form and structure to give a more robust response in terms of analysis.

Generally, stronger responses included appropriate and accurate critical terminology to link evidence and explanatory comments on the effects created by the writers of the original passage and directed response. Candidates recognised that the article employed a modified formal or mixed

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register, alternating between first person (from the company's perspective), second person (addressing the reader), and third person (to describe features and provide commentary). These choices supported an informative yet engaging tone, underpinned by a number of credibility-building devices. They noted that, in the given text, quotations from real passengers, such as Julia Senninger, served as indirect endorsements, while statistics such as the comparison of 250kg of CO_2 for air travel vs 26kg for trains reinforced the environmental case. Some candidates also commented on stylistic features, such as the alliterative *coaches and capacity to carry*, the onomatopoeic *buzz* conveying anticipation, and the triadic structure *adventurous, romantic and efficient*, which encapsulates the ethos of sleeper travel in a positively connoted phrase.

The comments from above were compared, as relevant, to their own directed response, noting that their tone was more promotional and energetic, designed to excite and persuade a travel-curious or younger audience. They described their use of direct address ('You deserve to travel in style'), rhetorical questions ('Why waste time in airports when you could wake up in a new country?'), and imperatives typical of advertising language ('Book now!', 'Don't delay!'). Some included short quotations as testimonials, for example 'Competitive cost, environmentally friendly, a relaxing experience', mimicking the article's use of expert or user perspectives.

Many stronger responses also addressed **structure**. Candidates recognised that the article adopted a chronological structure, beginning with a recent example *Back in October* and expanding outward to broader European developments. This helped frame sleeper trains as both a personal and pan-European experience. By contrast, where relevant, directed responses typically featured a thematic structure, organised around key benefits such as comfort, sustainability, and convenience. These were often signposted with bold headings and subheadings, for example 'Why Choose Sleeper Travel?' or 'Your Journey Starts Here' and occasionally bullet points, used judiciously for emphasis. There was also recognition of the present tense to highlight the sleeper service's immediacy and the future tense to suggest aspirations or outcomes: 'Travel will never be the same again'.

In terms of **language**, and in addition to above, many candidates identified that the title of the article suggested a sense of something being revived or brought back to life, aligning with the theme of the resurgence of sleeper trains. They commented on the use of quotations from both rail company representatives and passengers, recognising these as strategies to add credibility and authenticity to the article's claims.

The environmental benefits of train travel were frequently mentioned, with most candidates noting how the article contrasted rail and air travel, typically to the detriment of the latter. The inclusion of facts and figures (such as CO_2 emissions as above) was widely understood as reinforcing the case for sleeper trains, though at times candidates focused too heavily on the air travel comparison, both in analysis and in their own directed response.

Some candidates recognised the use of tripartite structures, such as *adventurous, romantic and efficient*, though fewer explored the effect of listing European cities, which was less commonly analysed. There was also general awareness of the article's romanticised portrayal of train journeys, for instance, the idea that sleeping onboard saves the cost of a hotel and creates a more pleasurable, experience-rich journey.

However, relatively few candidates commented on the wider tone of rejuvenation or revival present in the article. This was perhaps because many were more focused on the competitive advantages of rail over air travel, a theme that also dominated much of the language in their own directed responses. As a result, there was sometimes limited attention to the article's broader emotional appeal, beyond its practical benefits.

Weaker responses were more likely to treat the article and directed response separately, offering descriptions rather than comparisons. Many simply listed features, for example 'the article used quotes' or 'my writing used adjectives', with little explanation of effect or audience engagement. Some overlooked the importance of form and structure, focusing only on surface-level content or language. Others misunderstood the article's purpose, interpreting it as an argument about sleep itself, or mischaracterising its tone as entirely promotional rather than informative.

Less successful commentary also included generalisations such as the article being 'unbiased' for acknowledging both air and rail travel benefits, or over-simplistic observations about third person vs second person use.

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Such weaker responses often did not compare 'like with like' and tended to summarise content rather than to analyse comparatively, with few or no supporting examples from the texts. They were often very general, showing little awareness of how writers' stylistic choices relate to audience and shape meaning. Some candidates mainly listed the conventions of writing associated with the genres without reference to the texts, and merely pointed out the variety of sentence types or length of paragraphs without any reference to effect. Many weaker responses took a reflective commentary approach, a requirement of Paper 2, when analysing their own writing, often referring to what they could 'done better' which is not a requirement of the task. These responses showed lack of precision with use of linguistic terminology.

Candidates would be well advised to note that 'comparative' is the most discriminating skill in terms of reading and especially analysis, analysis that not only explains how a technique works generally but also how specific effects are created that relate to audience and shaping of meaning.

Furthermore, candidates' responses would benefit from clear references to the relevant text; this is particularly important when following a topical approach.

Question 2

Candidates were asked to read an extract from a non-fiction book about mindfulness. They were then required to analyse the text, focusing on form, structure and language.

Most of the responses began with an overview of the purpose and audience and commented on the descriptive and reflective nature of the excerpt. The most successful responses demonstrated not only a sound grasp of language, structure and form, but also an appreciation of the writer's purpose: to reflect, to connect, and ultimately to inspire empathy and action through shared humanity.

Stronger responses demonstrated a clear understanding of the writer's purpose, recognising that *The Invisible Army* was structured not just to recount a personal experience, but to offer advice, inspiration, and a call to action. Many noted that the title itself intrigued the reader, suggesting something hidden yet powerful, with the identity of the 'army' gradually revealed through the narrative and reflections.

These responses often highlighted the opening anecdote, describing how it immediately engaged the reader and created a personal connection. Phrases such as *our home* implied a family unit, and the first-person narrative drew the reader into the experience. Some referred to the speaker as a 'protagonist' or 'narrator' who was 'average' or 'ordinary', which allowed readers to sympathise with their vulnerability.

There was a strong focus on tone and structure, with perceptive commentary on how the piece evolved from a personal account to a broader, more philosophical message. Candidates observed that the use of discourse markers and the shift to a numbered list in the second half served to ease the reader into sensitive reflections, creating an almost conversational guide. One stronger response commented on this as a move 'from emotional recount to philosophical guidance', noting how each point developed the themes of connection and compassion.

Many responses were sensitive to the impact of language choices, including emotive lexis such as *helplessness*, *hurt*, and *flooding our minds*, which conveyed the trauma of the break-in. The use of idiom, like *power of love* and *love in action*, was interpreted as conveying warmth and collective strength, while metaphorical imagery was often seen to reinforce abstract values through emotional resonance.

The imperative mood, used in lines such as *Pick up the phone to say hi…*, was successfully analysed as a gentle call to action, fostering a tone that was empowering rather than forceful. The use of tricolon and repetition, for instance *say hi and check in*, *be honest, share your troubles*, and the repeated use of *do not*, was seen to give rhythm and clarity to the message, as well as reinforce its key ideas.

Stylistic features such as polysyndeton, for example, *and police were called and reports filed*, were explored in stronger responses, for their role in conveying a stream-of-consciousness effect, reflecting the narrator's sense of disorientation or emotional overload. Alliteration, such as *family, friends* and *more and more messages*, was sometimes highlighted for the emphasis it gave to the communal aspects of the narrator's recovery.

The most successful commented on tonal shifts across the piece – from the fear and tension of the initial break-in to a final tone of hope, gratitude and reflection. Several recognised how contrast was used, for

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example between digital communication and human connection, or self-sufficiency and accepting support to develop the message that genuine help is both powerful and needed.

In contrast, weaker responses tended to rely on narrative summary, retelling the events of the break-in and the community's response without analysing how the writer's stylistic choices shaped meaning. While many identified features such as the first-person voice or the emotive language, they often stopped short of exploring the effects of such devices in detail. For instance, some commented that 'this creates emotion' or 'this makes the reader want to read more' without elaborating on how or why.

Some of these weaker responses repeated similar ideas, focusing heavily on the sense of 'hopelessness' or 'community' without developing a nuanced comparison or analysis. Others misunderstood aspects of the text, for example interpreting *one autumn night* as establishing a dark, gothic atmosphere, or suggesting that the narrator's use of advice implied obligation (*must*), when the tone was in fact more invitational.

While many weaker candidates identified the personal tone, lists, and emotive vocabulary, they didn't often link these to the writer's broader purpose or intended audience. Some labelled the text as merely 'emotional' or referred vaguely to 'personal growth' without connecting these ideas to specific stylistic features. There was also a tendency to ignore form and structure, despite clear shifts in paragraphing and tone that reflected the writer's development from personal trauma to communal uplift.

Furthermore, many of these weaker responses neglected to discuss how structure supported meaning, for example, how the lengthier early paragraphs may have been intended to slow the pace and emphasise seriousness, or how the use of a numbered list helped organise advice clearly and accessibly. Likewise, while repetition and rhetorical questions were often mentioned, few candidates analysed their rhetorical or persuasive effect in detail.

Basic responses offered very generalised comments. These responses identified some language features but offered minimal analysis. Such responses tended to summarise the contents of the text, generally at great length.

Selection of evidence by way of quotation was not always expertly used in weaker responses, with some candidates quoting at far too great a length or merely referring to a range of lines.

Quotation from the text should always be precise, as concise as possible and linked to explanatory comments. Candidates should be advised to: use quotations, evidence and evaluation, to produce precise, meaningful commentaries; use appropriate language to link quotations and evidence with explanatory comments; and integrate quotations and evidence into a cohesive argument.

It would be helpful for candidates to be aware that the discriminator 'analysis is coherent and effectively structured' is a feature of the higher levels; a whole-text approach can often provide sophisticated and coherent analysis. A line by-line approach can lead to repetition of the same point, such as the author's use of alliteration. It is worth remembering that the same point cannot be rewarded twice.

Candidates would also be well advised to avoid dependence on too formulaic an approach to the analysis of Reading texts. The categorisation of elements of a text as representative of 'ethos' or 'logos' or 'pathos', for example, needs to be precisely developed by reference to exact effects of language. Candidates should also be advised that a glossary is not part of a given text but provided by Cambridge to provide definitions for words or phrases that may be unfamiliar, or that have specialised or technical meaning within the context of the document, and that consequently they have no need to comment on it.

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ENGLISH LANGUAGE

Paper 9093/21
Writing

Key messages

- Candidates should manage their time carefully, allocating an equal amount of time for each section of the paper. Quite often, the time spent on ***Section A*** seemed to have left candidates insufficient time to meet the required word count in ***Section B*** or to satisfactorily complete the task.
- Candidates must understand the importance of writing in clear, properly punctuated English, with accurate sentence demarcation, to perform well in this exam. Punctuation is a vital and essential aid to communication, especially as a guide to the structure of sentences, so it is imperative that candidates know and understand the basics of sentence construction if they are to succeed on this paper.
- Clear expression in simple and compound sentences without much variety is preferable to expression that does not flow, in long, rambling sentences. Often, weaker candidates lose control of grammar when they attempt to write in long, complex sentences. One error that again occurred regularly was that of separating sentences with commas rather than full stops; another common error was writing in sentence fragments. Clear and accurate sentence demarcation is crucial, followed by the accurate use of a wider range of punctuation.
- Candidates should be aware that relevant content in the correct form is a key aspect of the overall assessment of responses for **Question 1(a)** and ***Section B*** tasks. They should focus on answering each aspect of the task, ensuring that all content is relevant. Writing should be purposeful, without rambling or unnecessary filler content.
- To ensure that candidates do understand the key requirements of each question, it may be helpful to underline key words within the question which indicate the specified form, content, audience and purpose of the tasks chosen. In order to achieve the task (one of the Level 3 criteria on the mark scheme) the instructions must be followed.
- Candidates must be aware of the need for clear paragraphing in their responses, including paragraphing for direct speech. A secure focus on structure is crucial since it helps the reader to feel that the candidate is in control of their writing.
- Candidates who have difficulty with tense selection should focus on writing in one tense, preferably either the present tense or the simple past tense.
- Candidates should be encouraged to proofread carefully, particularly for accurate sentence demarcation and for tense confusion/inconsistency. Such errors impede, sometimes seriously, the overall sense of fluency and cohesion.
- Candidates need to ensure that they provide evidence from their text to support points made in the **Question 1(b)** commentary. It is helpful to candidates to use a clear structure for this question, such as a PEA structure (Point, Evidence, Analysis).
- Candidates should be exposed to a wide variety of different text types, as outlined in the syllabus, so that they become familiar with the conventions of a variety of writing forms and purposes. They should be taught key features of those text types, to enable them to replicate these in their own writing.

General comments

Many candidates self-penalised on the grounds of rubric infringement: some ***Section B*** responses were appreciably short of the minimum word limit and a few candidates did not answer **Question 1(b)** at all. Some candidates wrote well over 400 words for **Question 1(a)**, often at the expense of ***Section B***, which was either short or full of errors, possibly indicating that they had run out of time to check their work.

Stronger responses to **Question 1(a)** focused clearly on the question, comprised effective emails written in an appropriately formal tone. These candidates gave a few clear reasons to support their opinion, often referring to quotations from the original imagined article. Weaker responses often lacked an appropriate tone and relied on anecdotal evidence.

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The strongest responses to **Question 1(b)** maintained a close focus on linguistic and stylistic choices, with the relationship between these features being explained and explored successfully. They used relevant terminology consistently and confidently, and language precisely and appropriately. Weaker responses focused mostly, or entirely, on content and therefore only provided minimal analysis by indirectly outlining the structure of the piece.

Stronger responses on ***Section B*** generally had a strong sense of the appropriate form for the task; (review, story or speech), a clear focus on the question and included appropriate stylistic conventions, as well as relevant content. Weaker responses on ***Section B*** generally contained frequent errors or lacked focus on what the task required. For example, some responses to **Question 2** were simple recounts of the content of the TV series, with very little in the way of critique or personal opinion, some **Question 3** responses lacked any sense of drama or suspense, and some **Question 4** responses were not in an appropriate form for a speech.

Comments on specific questions

Section A: Shorter writing and reflective commentary

Question 1

You recently read a newspaper article which said that the world would be a better place without mobile phones. You decide to write an email to the editor, in response to this article, giving your opinion

(a) Write the text for your email, using no more than 400 words. In your writing, give reasons to support your opinion.

Most candidates structured their writing clearly in paragraphs and demonstrated good awareness of the conventions of an email, using an appropriate tone. However, some candidates failed to adopt a suitable register, becoming overly emotional and sometimes verbally attacking the editor. The majority of candidates objected to the proposition entirely; however, a few agreed with the editor. Many candidates referred to personal experiences and effectively used emotional appeal to support their arguments. Some candidates took a balanced approach before favouring the continued use of mobile phones. There was a tendency by some candidates to confuse social media and mobile phones; these candidates somewhat digressed by discussing how the world would be a better place without social media instead of without mobile phones.

Stronger responses consistently addressed the appropriate audience, often beginning with clear and relevant greetings such as, 'Dear Editor, I have to wholeheartedly disagree.' They included features of an argument consistently throughout, giving clear reasons why mobile phones can be useful. They explored each reason in depth and complex lexical choices helped create a tone of credibility, with phrases like 'substantial impact', 'limiting the opportunities of our future generation' and 'capitalism and consumerism' demonstrating sophistication in language use.

Stronger responses were written in a respectful and professional tone, citing appropriate examples that reinforced the main points. For instance, one candidate wrote, 'On the contrary, many individuals earn a living solely through mobile phones. Influencers earn money using platforms like Instagram, Tik Tok and You Tube.' These candidates made sure to address all aspects of the question, balancing their opinion with some less common lexis, as well as a variety of rhetorical devices. Some candidates made effective use of figurative language to strengthen a point, such as the analogies in this example: 'Phones are as dangerous as knives. Without any training, they can be used to harm people, including the wielder.'

In their development, stronger responses addressed multiple points and elaborated on these with appropriate examples and language techniques. These candidates commonly used rhetorical questions, repetition, pathos, and relevant jargon related to mobile phones. For example: 'Do not you find it beautiful how we can share our opinions from across states, countries, oceans? You must agree that phones have interconnected the world's vast cultures.' Paragraphs were structured with specific purposes in mind, and sentence structures were employed to emphasise key ideas. Many showed evidence of planning, which contributed to a coherent flow throughout the email. Most also wrote close to the 400-word limit, allowing sufficient space to fully develop their ideas and persuasively argue that mobile phones are not the root cause of societal issues. Additionally,

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candidates generally adhered to the email format, including address terms, body paragraphs, salutations, and signatures. For example, a considered final line was: 'I hope you will consider my humble opinions.' This demonstrated awareness of socio-pragmatic factors such as tone, directness, and formality appropriate to the audience and task.

Weaker responses were characterised by a poor awareness of audience and a lack of structure, as well as quite limited development of ideas. This all restricted the candidate's ability to fully meet the requirements of the question. These candidates typically wrote lists of reasons without sufficient elaboration, such as: 'Phones make life easier because we can call more people.' Their tense agreement was often insecure and inconsistent. They showed very little acknowledgement of audience or purpose, with examples like, 'Hi, I think cellphones are good.' Their viewpoints were frequently unclear or contradictory, for instance: 'I think mobiles should not be banned but also for some people they should be banned.' Sentence structures often contained errors such as missing punctuation and run-on sentences, which, along with numerous spelling mistakes, severely hindered communication.

Weaker responses tended to be subjective or emotional and attacked the editor without raising convincing arguments that justified their position on the article. These responses were sometimes very short, often only one paragraph, briefly outlining different ideas such as safety, education, GPS and using the internet, without exploring the subtleties and nuances around each idea. Some responses lacked respect for the audience, expressing outrage and/or shock at the opinions shared by the author of the newspaper article; at times, these were either too aggressive in their approach and language or far too casual in their tone and vocabulary.

(b) Write a reflective commentary on your text, explaining how your linguistic choices contribute to fulfilling the task set.

Many responses lacked true analytical depth, with candidates frequently summarising or paraphrasing what they had written in **Question 1(a)** rather than analysing their choices. One approach that worked well for some candidates was to use a Point, Evidence, Analysis format to analyse form, structure and language. They named, one by one, the techniques used, providing precise evidence and explaining the effect on the audience. However, many responses were limited in detail and did not provide evidence from the **Question 1(a)** response.

Stronger responses clearly identified techniques and elaborated on the purpose behind each one. These candidates quoted specific examples from their **Question 1(a)** writing and explained how the techniques helped achieve a particular effect. One illustrative example is: 'To appeal to my purpose of explaining my reasons for my opinions, I used rhetorical devices like rhetorical questions ("Were you aware that...") paired with statistics ("72 per cent") to back up my ideas and to put the editor in my shoes. This was also done through anecdotes like "just yesterday" to display a sense of knowledge. A friendly tone is also made through exclamatory sentences and parenthesis ("and this was during a coastal sunset too!") which adds a sense of humour and interest.' This example demonstrates how the candidate not only named the techniques but also explained their objectives, which aligns with the expectations for language analysis.

References to logos, ethos and pathos were also very popular. For example, in reference to the impact removing phones would have on small business, one candidate wrote: 'I utilized rhetorical language, specifically pathos, to appeal to emotion and further persuade the audience. In paragraph 7, I write, "What kind of cruel person would want to take that away?" which attempts to make the reader feel guilty by painting them as a villain for holding their opinion.'

Weaker responses tended not to demonstrate any analysis of language, form or style. Instead, candidates often merely stated words or sentences they used without discussing techniques. For example, one candidate wrote, 'I have used the word disagree to show that I disagree.' Similarly, some candidates tended to quote long chunks of their own writing, such as, 'I wrote that "I always make sure to get the weekly paper at the end of each week." This statement shows that I've read the weekly paper for a long period of time.' Although this shows some attempt to explain, it does not constitute analysis of language, form or structure.

Another common tendency was to simply list the techniques used, with statements like, 'I have used this simile' or 'This repetition has been used' followed by examples quoted from their work. these candidates did not explain the purpose or effect of these techniques. For instance stating that repetition has been used without commenting on what it achieves is insufficient to demonstrate true

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analysis. As a result, such responses showed limited analysis. In weaker responses, points were often very vague, with no examples provided, for example: 'The devices I used to get my points across was similes and metaphors. I got my points across through a emotional perspective but also through a serious and intelligent way as well. Overall, I made myself direct with my opinions and even pulled out quoting from the article.' Other responses were extremely short, sometimes under 100 words, and in some cases the question was not attempted.

Section B: Extended writing

Question 2 – Review

You have been watching a new TV series about interior design. You decide to write a review of the series, which will be published in your school magazine. Write between 600 and 900 words.

Most candidates wrote positive reviews, offering opinions on format, presentation and some technical aspects of the series. Most chose to write in an informal register, suitable for a school magazine, and there was generally an awareness that this was a review and that there needed to be some balance expressed, along with a final verdict.

In stronger reviews, candidates engaged their audience from the outset, often making their opinion clear in the title. For example, one review opened with the arresting title, 'The House Healers UK – a bigger disaster than I thought possible.' This was followed by an opening sentence which immediately addressed the audience directly and engaged them: 'Art and design candidates, if you have not turned on BBC One at 5 pm on Thursdays recently, then I would STRONGLY advise you to keep on living in uninformed bliss.'

Stronger responses often included subheadings to focus clearly on areas for review. Some developed the imagined content in an interesting way, for example by including ideas like an 'AI generator' to produce a mock-up of what a room would look like. Additionally, some included a comments section, with associated email address, for readers to write into, thereby fulfilling form and stylistic aspects of real-world reviews of this type. Such candidates also used less common lexis appropriate to the semantic field of interior design, such as 'aesthetically' and 'complementary colour schemes'. Authenticity was created by creating a suitable title for the review, such as 'Dream Designers…Destiny's Designs: a show you must not miss!' There were examples of a convincing sense of reviewer voice which engaged the audience, such as in the following two examples: 'Interior Design for Dummies shows that moving out into your first home does not have to be tough – hence it's a five-star watch for me,' and 'Another aspect that deserves all the praise is the variety of homes that were decorated in the show. Inclusivity, in niche markets like interior design, is an aspect I love to see. The show's hosts Luka and Jackie offered expertise to a wide range of houses—from cramped one-bedroom houses to palatial state-of-the-art mansions.' Some candidates referred in detail to an imagined specific episode, enabling them to write in precise detail rather than in general terms

In weaker reviews, candidates often wrote lengthy narrative accounts of an episode from the series, without giving their evaluation and opinion of the show beyond the very basic, such as: 'The show is good and fun to watch.' Other weaker responses focused too heavily on technological elements at the expense of meaningful review about content, presentation and other relevant aspects of the series. Some candidates spent too long setting the scene, for example describing themselves as 'bored, on a rainy day, scrolling through Netflix for something to watch.' Whilst this could form part of a relevant introductory paragraph, this point was sometimes laboured and starting to stray into diary entry territory, forming too large a section of the task. Other weaker responses were overly negative, giving a low star rating without convincing reasons, while others were very short and in need of development. Many weaker responses also contained numerous grammatical and structural errors.

Question 3 – Story

Write a story called *No Turning Back*, about a person who leaves home one morning and decides never to return. In your writing, create a sense of drama and suspense. Write between 600 and 900 words.

Many stories centred around a teenager experiencing abuse, neglect, or emotional conflict, usually within a troubled home environment involving parents or stepparents. This theme was a common choice, and while it offered opportunities for drama, the treatment of it varied significantly in quality. Whilst many candidates created or attempted to create drama and suspense, some candidates struggled to write consistently in one tense, resulting in a more muddled narrative. Most stories reached a satisfactory ending, even if it was necessarily looking forward to the unresolved future.

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Stronger stories were written with more control and development. These responses were focused on characterisation and setting to enhance their narratives and to build the appropriate atmosphere. For example, one such response described three key places the narrator cycled past on their way out of town, each providing a bit more exposition and context as to why they were leaving, rather than stating it explicitly in the beginning. These candidates demonstrated their ability to use imagery and linguistic techniques to achieve drama and suspense more effectively, such as in: 'My home grieved for me, even though I was not yet gone. Maybe it already knew I was a ghost.' Additionally, showing the character's feelings and reactions rather than merely stating them made for a more engaging response: 'I walked through the empty halls once more. My footsteps echoed through the house like the ghosts that haunted graveyards, an odd sort of hollow grief that trails behind the race of time.'

Stronger stories were successful in building drama and suspense through a carefully crafted structure. One candidate used a ticking alarm clock as a structural device: 'The slow ticking of the clock was her only company. It was consistent, reliable; it never hesitated.' As the girl tried to escape, the ticking of the clock intensified: 'She wished the clock would stop counting for a moment. Time was running out.' The reason for the protagonist wishing to escape an unpleasant home environment was gradually revealed at various points through the narrative, thus maintaining the reader's interest. Another strong response was written from the perspective of a refugee fleeing Lithuania for the USA in WW2, effectively describing small details such as suitcases on the boat and the 'luminous glow of skyscrapers' on arrival at New York: 'The low toned boat horn exclaimed that our journey was over; joy was tinged with sadness knowing we were never going back.'

Some candidates used a time lapse structure and this was sometimes very effective as they made it into a circular narrative, looking back from the perspective of an older person who had made a new life in different place. Occasionally humour was used to good effect, with candidates assuming a sarcastic or world-weary tone and maintaining it consistently throughout the piece. Other candidates utilised pathetic fallacy to set an ominous tone from the outset, for example: 'Dawn breaks over the peaks of snow-capped mountains and the clouds hang heavy and dense in the sky. Dark and black and viscous, they gather; static electricity crackles bright and tense within the cavernous confines of rain-burdened clouds.'

Weaker responses tended to be poorly planned with limited narrative characteristics and more of a focus on a series of events with little development, some not entirely connected to the opening prompt. Weaker responses sometimes used the 'it was an ordinary day'' phrase within the first few lines, followed by a pedestrian listing of a morning routine in the first few lines as an attempt at exposition, rather than integrating the exposition into the action. Weaker responses often lacked originality or relied on clichés. These narratives typically included limited character development and predictable plotlines. They tended to lack descriptive detail and suspense-building techniques.

In these stories, candidates seemed unsure of how to develop their plots or build tension. Often, these responses consisted of just an opening or fragment rather than a full narrative. Grammatical weaknesses and poor sentence demarcation were common, especially in weaker scripts that combined multiple issues, including lack of cohesion, inaccurate punctuation, and inconsistent tenses. A typical example read: 'As Georgina is climbing out her window her hand slip from grapping her window from and cuts herself, she screamed. Her mother dashed through her bedroom door "What on earth are you doing Gina" her mum yells out. Georgina froze at the site of her mother and decided to climb back into her window.' These errors disrupted the reader's engagement and impeded meaning. Additionally, weaker responses frequently fell short of the required word count, resulting in limited character or plot development.

Verb tense control was a particular challenge, with many candidates shifting inconsistently between past and present. Examples such as 'she speak' or 'I was aware I am a guest' demonstrate a lack of mastery over basic grammatical structures. The recommendation for such candidates is to stick to a single, consistent verb tense (preferably past tense) to avoid confusion.

Question 4 – Speech

Your class has just had a discussion about the benefits of studying science subjects at school. Your teacher has asked you to give a speech to first-year candidates at your school, encouraging them to learn science subjects. Write the text for your speech, creating a sense of enthusiasm for science. Write between 600 and 900 words.

Most responses focused quite well on the benefits of learning science subjects and frequently linked this to employment opportunities. A summary of the contents of the speech was usually provided in the conclusion, often with a call to action and a valediction to close. Some candidates demonstrated a solid understanding of

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audience and purpose. Most used at least some features of speech, such as rhetorical questions, and maintained an appropriate tone and register, generally informal but not overly colloquial.

Stronger responses created a genuine connection with the reader, often by establishing a voice or persona. For instance, opening lines like, 'I remember when I was just starting here' and 'We are so lucky that we have the facilities that we do here' added warmth and relatability. These candidates used a range of persuasive techniques to engage their audience directly, for example: 'Even the greatest minds like Marie Curie and Einstein were once candidates just like you' and 'In Environmental Science you will learn how to make a real difference in this world rather than sitting by and ignoring the greater issues.' They also maintained a strong sense of voice, for example: 'Plus, who does not love messing around with chemicals like an evil scientist? Shh, do not tell the headmaster I said that!'

Better responses were imaginative and purposeful. They used extended metaphors and referenced global issues such as 'global conflict' and 'global warming', linking their ideas to wider societal contexts. They also demonstrated grammatical accuracy throughout, with correct spelling and punctuation. An example of a strong, structured greeting was: 'To our Head Teacher, and her Deputy, teachers and fellow students – good morning!' This set a respectful and formal tone suitable for the speech format. The purpose was also made clear early on, as shown by: 'I am speaking to you today about the importance of learning a variety of sciences for our development.'

These responses elaborated on various ideas, for example, how science helps us understand the world, how it can be enjoyable and surprising, and how it leads to diverse careers providing 'infinite paths to go down'. Candidates used effective transitions such as 'moreover', 'furthermore', 'additionally' and 'consequently' to provide flow between paragraphs and ideas. Such candidates enriched their arguments by quoting famous scientists and philosophers, adding credibility and depth to their responses. One candidate wrote: 'Famous philosophers such as Pythagoras and Socrates as well as geniuses like Da Vinci and Tesla […] icons of human history have improved the overall life of humanity due to their inventions and reasoning.' This was often followed by rhetorical questions used purposefully, rather than as a standalone device, such as: 'Why can not you be the next one to influence humanity?' Many concluded their speeches effectively, providing closure and acknowledging the audience. One candidate wrote a personalised motto that left a memorable impression – 'If you want to, you can!' – paired with a simple thank you to the audience for their attention.

In weaker responses, candidates often listed different areas of science without development. Their understanding of science often came across as superficial or stretched. There were some pedestrian responses merely listing and explaining the different sciences, for example: 'Biology is the study of life we learn about the intresting things we may or may not know how we see a specific color, how the water cycle works, cells of organism similarity or differences.' Some weaker responses relied on a rather mundane understanding of studying science, such as in this limited understanding of the anatomy of plants: 'You will understand how they grow which will make your garden flourish even more, and in case you go on a family camping you'll be able to point out the different parts, and tell them which ones they can not orcan eat.'

A significant number of responses contained insecure spelling, punctuation, and grammar. Many responses contained frequent errors of various kinds, for example: 'Our science instructares here make learning science corses easy and fun to understand, so that it is both engaging and comprehendible. You should always take advantage of new ofpertanities to learn what goes on in the earth, your body, in the wild, and so much more.' Such language issues hindered clarity and reduced the overall impact of the writing. Another recurring issue was repetition, often of the same points in different paragraphs with no added effect or purpose. These responses were also frequently under the required minimum word count.

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ENGLISH LANGUAGE

Paper 9093/22
Writing

Key messages

- Candidates should manage their time carefully, allocating an equal amount of time for each section of the paper. Quite often, the time spent on ***Section A*** seemed to have left candidates insufficient time to meet the required word count in ***Section B*** or to satisfactorily complete the task.
- Candidates must understand the importance of writing in clear, properly punctuated English, with accurate sentence demarcation, to perform well in this exam. Punctuation is a vital and essential aid to communication, especially as a guide to the structure of sentences, so it is imperative that candidates know and understand the basics of sentence construction if they are to succeed on this paper.
- Clear expression in simple and compound sentences without much variety is preferable to expression that does not flow, in long, rambling sentences. Often, weaker candidates lose control of grammar when they attempt to write in long, complex sentences. One error that again occurred regularly was that of separating sentences with commas rather than full stops; another common error was writing in sentence fragments. Clear and accurate sentence demarcation is crucial, followed by the accurate use of a wider range of punctuation.
- Candidates should be aware that relevant content in the correct form is a key aspect of the overall assessment of responses for **Question 1(a)** and ***Section B*** tasks. They should focus on answering each aspect of the task, ensuring that all content is relevant. Writing should be purposeful, without rambling or unnecessary filler content.
- To ensure that candidates do understand the key requirements of each question, it may be helpful to underline key words within the question which indicate the specified form, content, audience and purpose of the tasks chosen. In order to achieve the task (one of the Level 3 criteria on the mark scheme) the instructions must be followed.
- Candidates must be aware of the need for clear paragraphing in their responses, including paragraphing for direct speech. A secure focus on structure is crucial since it helps the reader to feel that the candidate is in control of their writing.
- Candidates who have difficulty with tense selection should focus on writing in one tense, preferably either the present tense or the simple past tense.
- Candidates should be encouraged to proofread carefully, particularly for accurate sentence demarcation and for tense confusion/inconsistency. Such errors impede, sometimes seriously, the overall sense of fluency and cohesion.
- Candidates need to ensure that they provide evidence from their text to support points made in the **Question 1(b)** commentary. It is helpful to candidates to use a clear structure for this question, such as a PEA structure (Point, Evidence, Analysis).
- Candidates should be exposed to a wide variety of different text types, as outlined in the syllabus, so that they become familiar with the conventions of a variety of writing forms and purposes. They should be taught key features of those text types, to enable them to replicate these in their own writing.

General comments

Many candidates self-penalised on the grounds of rubric infringement: some ***Section B*** responses were appreciably short of the minimum word limit and a few candidates did not answer **Question 1(b)** at all. Some candidates wrote well over 400 words for **Question 1(a)**, often at the expense of ***Section B***, which was either short or full of errors, possibly indicating that they had run out of time to check their work.

Stronger responses to **Question 1(a)** focused clearly on the question by making the purpose of the speech clear from the outset and comprised effective speeches which engaged their peer group audience and introduced both sides of the debate. These candidates utilised a clear structure and format. Weaker responses were unclear in terms of the purpose of the speech or to whom it was addressed and they tended to focus on only one side of the debate. Ideas were disorganised and often lacked any paragraphing.

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The strongest responses to **Question 1(b)** maintained a close focus on linguistic and stylistic choices, with the relationship between these features being explained and explored successfully. They used relevant terminology consistently and confidently, and language precisely and appropriately. Weaker responses focused mostly, or entirely, on content and therefore only provided minimal analysis by indirectly outlining the structure of the piece.

Stronger responses on ***Section B*** generally had a strong sense of the appropriate form for the task (story, essay or review), a clear focus on the question and included appropriate stylistic conventions, as well as relevant content.

Weaker responses on ***Section B*** generally contained frequent errors or lacked focus on what the task required. For example, some responses to **Question 2** lacked any sense of drama or suspense, some responses to **Question 3** read more like magazine articles than essays, and some **Question 4** responses were simple recounts of the content of the photography course with very little in the way of critique or personal opinion.

Comments on specific questions

Section A: Shorter writing and reflective commentary

Question 1

You are going to take part in a debate at school about whether it is better to have one job for life, or to change careers one or more times. Your headteacher has asked you to open the debate by giving a short speech on the topic.

(a) Write the text for your speech, using no more than 400 words. Introduce both points of view and create a sense of interest in the debate.

Many candidates demonstrated an understanding of the required format, showing awareness of audience and tone. Most candidates were able to generate some relevant arguments in response to the task. Common points in favour of staying in one job included long-term security and pension benefits, the opportunity to build deep expertise, and a strong sense of workplace community. In contrast, arguments supporting career changes often focused on developing broader skills, achieving higher earning potential, and adapting to a rapidly changing job market. Many candidates acknowledged the merits of both sides before clearly stating their own position. This helped to build momentum for the debate and allowed room for potential rebuttal.

Stronger responses usually began with a direct address and attempted to engage their audience early on, for example: 'Today, we have an interesting topic that has been debated for centuries: Is it better to have one job for life, or to change careers one or more times? Think hard here! Explore one land and call it your home or discover numerous corners and choose the best.' This type of introduction captured the spirit of the debate and set a clear direction for the speech. Another approach that created impact with a punchy opening was: 'Survive or thrive? What is it that you intend to do over the course of your working life?'

In stronger responses, candidates consistently used a range of language to create a compelling voice, which gave their speeches a personal and persuasive tone. For example, one candidate wrote: 'Nothing compares to the adrenaline of securing your first job. I remember when…'. Such responses were well-balanced, presenting both the benefits and drawbacks of long-term careers over switching jobs. They moved beyond simplistic ideas like money, status or family expectations, instead exploring deeper motivations and societal factors. Stronger responses were characterised by the inclusion of a variety of rhetorical devices, anecdotes and use of statistics. Stronger responses had an engaging, lively opening address, presenting an interesting hook rather than just rephrasing the question, such as in this example: 'Your life is a story. One with multiple chapters and pages that signify milestones and achievements. You make the choices. You hold the pen.'

Better responses were marked by their clarity, accuracy, and control of grammar and structure. Paragraphing was clear, with transitional phrases such as 'First, let us consider …' helping to guide listeners. Such candidates employed complex sentence structures effectively, as seen in this example: 'Or maybe they would not. Maybe, since they were a kid, they've dreamed of "making it

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big" – discovering something groundbreaking, creating endlessly, or just becoming really important – and really rich – in their field. A zeal that tells them what they're destined for.' These candidates demonstrated a well-developed thesis, maintained a logical flow, and concluded with clarity.

Weaker responses showed some awareness of audience, usually with a greeting, but many closed inappropriately and often lacked a clear opinion or argument. These candidates jumped from one idea to the next without an organising structure or cohesive thesis. Many began with excessive detail, particularly personal anecdotes about childhood dreams or family pressures, then ran out of time or space to complete the task meaningfully. Content was often simplistic, sticking to repetitive points about earning money or stability, for example, without further development.

Weaker responses were composed very simply and lacked a sense of interest, for example: 'When it comes to sticking through one job; it is extremely understandable. Choosing one major career and holding on to it has a good direction.' Grammar and sentence demarcation were significant weaknesses in many lower-level scripts. For example, one candidate wrote: 'But be careful while choosing this critical and decisive decision, there are some crucial points you have to think about and take in consideration, one of them being financial stability, my advice is searching up the yearly salary a average person.' This sentence illustrates multiple issues, including run-ons, incorrect idioms, article misuse, and awkward phrasing.

(b) Write a reflective commentary on your text, explaining how your linguistic choices contribute to fulfilling the task set by your headteacher.

Many responses lacked true analytical depth, with candidates frequently summarising or paraphrasing what they had written in **Question 1(a)**, rather than analysing their choices. One approach that worked well for some candidates was to use a Point, Evidence, Analysis format to analyse the form, structure and language of their responses to **Question 1(a)**. They named, one by one, the techniques used, giving precise evidence from their answer and explaining the effect on the audience. However, most responses were limited in detail and did not provide evidence from their **Question 1(a)** response.

Stronger responses displayed candidates' ability to refer to specific stylistic features and explore their impact on meaning. For instance, one candidate wrote: 'I deploy the simile "Like a heart monitor" to create visualization of the changing careers.' Another wrote: 'Additionally, the metaphor "it could cripple you" demonstrates the negatives of one job for life.' These examples reflect an effort to identify language techniques and explain how they shape tone or contribute to argument.

Stronger responses effectively identified and explained specific linguistic features. For example, some discussed the use of rhetorical questions such as 'Have you ever wondered…?' to involve the audience, or inclusive pronouns like 'we' and 'us' to create a sense of shared experience. These candidates also commented on their use of a formal register and persuasive vocabulary. For example: 'The words "crucial" and "significant" add authority and emphasis.' Where relevant, some responses insightfully explored figurative language, such as metaphors depicting career change as a 'journey' or 'path,' and explained how these enhanced engagement and clarity.

They used relevant terminology consistently and confidently, using language precisely and appropriately. In this example, the analysis is detailed and focused: 'The simile "as risky as poker" suggests that switching careers is like playing poker which is generally considered a risky game. This further develops into an extended metaphor by using the words "royal flush" to describe the potential rewards as a royal flush is the highest value set in the game of poker.'

Such candidates demonstrated their ability to reflect on purposes, academic context and audience and how these factors shape style, tone and approach. They wrote about the spoken mode, politeness, debate protocol and rhetorical features. They traced the lexical patterns relating to both sides of the debate, often characterised by themes of stasis and change: 'trudging every day to the same place of work', 'doing the same thing day in day out can get repetitive and boring. It does not challenge you anymore', 'burnout' versus 'the fickle process of changing jobs and making countless applications' and 'As humans it's in our nature to want to explore and try new things.'

Weaker responses often summarised the content of the debate or made vague comments without providing examples, as in this case: 'The speech offers a new perspective on work troubles, with it being straightforward and simple. There is an avid use of connectors. Vocabulary is also simple and to the point as well as the use of paragraphs that distinguish the tackling of a different subject.

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I used simple words to make the speech more digestible.' Some candidates used written mode features to describe spoken mode features, for example referring to question marks rather than questions: 'This question mark helps to keep readers engaged throughout the text.' Other weaker responses tended to list a few basic features, mentioning devices like 'repetition' or 'pronouns', but with little or no attempt to explain how these were used or what effect they had on the reader. Frequently, these candidates listed words they had used without referencing the technical term or discussing its purpose. Many analyses were very short and were therefore insufficiently developed to demonstrate a sound understanding of form, structure, or language.

Section B: Extended writing

Question 2 – Story

Write a story which begins with the following sentence: *As I walked past the painting of the man, I was sure that his eyes were following me*. In your writing, create a sense of drama and suspense. Write between 600 and 900 words.

While some narratives demonstrated real creativity and linguistic flair, many fell short due to lack of planning, control and sustained development. More successful candidates tended to pick an appropriate location to fit with the prompt (museum, art gallery, mansion, antique shop) and then followed on their narrative from this point. A common technical fault was insecurity of tense throughout the piece: often, writing would move from the past to the present and back again frequently and in ways that did not suggest deliberate authorial intent.

In stronger responses, candidates demonstrated a clear ability to use language effectively to build atmosphere, tension, and imagery. They maintained focus on a single time frame, often a moment of confrontation with the painting, and shaped their narratives with intention and coherence. Tension was often created through sharp, controlled sentences such as, 'And there it was. I could never escape it.' These candidates made full use of descriptive and figurative language, bringing their stories to life through imagery like, 'Wave after wave of fear crashed throughout my body,' and 'the city retching heavily to rid itself of the panic we all felt.' Such vivid language added depth and mood. Stronger responses also displayed grammatical control, accuracy in spelling and punctuation, and a conscious use of structure to craft a complete and satisfying narrative. One strong example of descriptive control was: 'Deep in the school, past classrooms, lockers, and teacher's offices, lay a wide, open hall. Clumps of candidates hurried to grasp a glance, swarming the painting like bees swarming their hive.' Similarly, metaphors like 'my heart was an unruly drum' and expressions such as 'to soothe my beating heart' or 'I forced a staggering breath' reflected an elevated use of language to evoke emotion and develop tension.

Another way candidates successfully created tension was to establish a sense of ambiguity in the opening which stimulated reader engagement, for example: 'Though recently I did not know what to believe, who to trust. My life, once picture perfect, seemed to be spiralling out of control and all I could do was stand there and watch.' The use of analepsis was an effective device in this task, provided candidates were able to confidently master their tenses. Some candidates approached the task as the onlooker having some mental or psychological issue, creating a more intense sense of drama and suspense. This was then often revealed at the end. For example, 'There is no way a painting's eyes were following me. "Get it together", I mutter under my breath.'

One candidate wrote from the perspective of a security guard in an art gallery: 'From afar, there seemed nothing extraordinary about this man in a long brown trench coat, sneering at all the tourists that stood before him.' This candidate demonstrated a wide range of vocabulary and sentence structures, along with strong control over narrative organisation. Techniques such as internal monologue and sensory description were used effectively to create a growing sense of unease: 'I could feel a chill running down my spine as those eyes seemed to read my deepest, darkest thoughts.'

Weaker responses tended to be poorly planned, with limited narrative characteristics and more of a focus on a dramatic series of events with little development, some not entirely connected to the opening prompt. Weaker responses sometimes used the 'let's rewind a little' phrase within the first few lines but never returned to the prompt sentence, making for a fragmented response.

In weaker responses, candidates often struggled to use the prompt meaningfully. The painting was often treated as a throwaway detail rather than a central narrative device, as seen in the line, 'And I saw a painting with the eyes that followed me before I went back home.' These stories tended to lack planning, with seeming uncertainty over how to develop a plot or build tension. Often, these responses consisted of just an opening or fragment rather than a full narrative. Grammatical weaknesses and poor sentence demarcation

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were common, especially in scripts that combined multiple issues such as lack of cohesion, inaccurate punctuation and inconsistent tenses. A typical example read: 'I felt a shiver down my spine as a slowly turned around, I knew I wouldnt find anyone there… My hands wouldnt stop shakşng as I dailed the number.' These errors disrupted the reader's engagement and impeded meaning. Additionally, such candidates frequently failed to reach the required word count, resulting in limited character or plot development.

Verb tense control was a particular challenge, with many candidates shifting inconsistently between past and present. Examples such as 'she speak' or 'I was aware I am a guest' demonstrate a lack of mastery over basic grammatical structures. The recommendation for such candidates is to stick to a single, consistent verb tense (preferably past tense) to avoid confusion.

Question 3 – Essay

In class, you have been discussing whether it is better to spend your holidays in your home country, rather than travelling abroad. Your teacher has asked you to write an essay on the topic, giving your opinion. Write between 600 and 900 words.

Most candidates attempted to present both sides before offering an opinion. However, many responses lacked the formality required by the question and some were almost speech-like, including phrases like: 'Let's look at'. Other responses read more like magazine articles. Most candidates explored the topic to some degree but struggled to present a solid and well-reasoned opinion, as required by the task. In several cases, arguments presented were contradictory, which undermined the quality and coherence of the writing.

Stronger responses evidenced candidates' ability to present balanced arguments with clear examples, comparing cost, cultural experiences, and convenience. These responses used some cohesive devices and maintained a formal tone. For example: 'While holidays in your own country have their advantages like convenience and affordability, travelling abroad provides us with unique experiences that allow us to grow and connect with the wider world.' One environmentally conscious response evaluated the carbon emissions incurred in travel abroad, while another advocate of staying at home, keenly aware of diversity, suggested: 'Do not go to another gargantuan metropolis from whence you came, go to the interiors that may yet be untouched by rampant homogenous development.'

Stronger work was structured logically through the use of discourse markers such as 'On the other hand', 'furthermore' and 'it is not always as simple as that' to clearly link and contrast points. These candidates also used a range of language to craft a persuasive and reflective tone, with well-developed ideas that went beyond surface-level reasoning. One wrote: 'I could take out the latest holiday brochure and spend all of my allowance, or we could look closer to home and experience our own culture.' Such candidates also used this task to showcase their descriptive ability combined with the warmth of personal voice, for example: 'Best of all, travelling takes you to the most exquisite palate of incredibly sumptuous foods from all cultures – what one would not do for just one soft, fruity scoop of Italian gelato?'

Weaker responses often displayed misunderstanding of the task. These candidates sometimes launched straight into the task with a minimum of planning. For instance, one candidate began by writing: 'Holidays are favourite time for students and teachers. Since they are quite short, most of the people prefer to spend them abroad to make holidays unforgettable and probably one of the most engaging. Also it's too inconvenience.' Many produced narrative-style accounts instead of argumentative essays, for example: 'The day had come. I was finally boarding the plane.' Others simply listed reasons to go on holiday, without providing commentary or forming a viewpoint. Their pieces lacked development, with limited or no attempt to weigh perspectives or express a clear opinion. Instead, they relied on vague or repetitive points such as staying at home being cheaper. One response read: 'The question has too many answers but at different individuals with different thinking of life. If there are friends we can enjoy movie nights or pot locks, despite Its of no use.' Such errors in sentence construction, grammar, and spelling were frequent, often impeding meaning. These responses showed little awareness of structure or form, and the writing lacked the clarity and cohesion necessary for higher-level achievement.

Question 4 – Review

Last weekend, you did a one-day photography course for beginners. You decide to write a review of this course, which will be published on a photography website. Write between 600 and 900 words.

The review form was generally understood by most candidates, with most using evaluative lexis to some extent. The large majority were positive reviews of the photography course and there were some overly

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negative reviews, which sometimes became rather monotonous. Balanced arguments were raised – on what went well during the course and what did not go well – with a few providing suggestions for improvement.

Stronger reviews were balanced and had an element of credibility. There was some use of specialist language and field-specific lexis such as 'lighting/camera angle/shot' that would be appropriate for the review. Their use of headings, summaries, and final ratings strengthened the clarity and readability of their reviews. They also used conventions of the genre such as informal but informative language, subheadings, personal anecdotes, and ratings. For example, some candidates established their motivation for doing the course: 'As an avid traveller, I am always looking to capture beautiful moments in nature, but I fail to.' They evaluated aspects like tuition quality, value for money, and the expertise of instructors. For example, some described 'various cameras,' or mentioned 'the newly released 660 Canon' and provided insight into how such equipment enhanced the learning experience. The use of headings was a feature of stronger work, helping to organise content into sections while signposting focus areas for the reader.

Stronger responses tended to have an engaging and consistent voice throughout, the writers not only providing details of the course, but also their feelings and reactions too. They kept form in mind throughout, using evaluative language and providing recommendations: 'Overall, this course was one of the best I have experienced in recent years, and I urge you to take it too. You'll end the day with a dozen beautiful pictures, a smile on your face, and a sense of pride knowing that you created your own art.' They effectively developed a relationship with the reader and structured the review to focus on several key aspects of the experience, such as the venue, teaching quality, course content, and outcomes. For example, one candidate remarked, 'The organisation of the course was a real surprise,' effectively embedding a personal opinion. Others took a creative approach to tone and introduction, for example: 'Welcome back to the blog, clickers! That's what I call photographers who click at everything. You are in for a ride, for today I am going to talk about "SNAP ON THE MAP!" a photography course hosted by Tomorrow's Photos for beginners.' These openings established a clear voice while immediately situating the reader in a review format.

Weaker responses often showed misunderstanding or only partially addressed the requirements of the review genre. Some responses read more like descriptive accounts of the day or course without offering critical opinion or evaluation. First impressions of the organisers were overly long. There were several straightforward recounts with little evaluation of the course, even at the close. Such responses therefore lacked key features of a review, including little or no direct address to the audience. The 'beginners' aspect of the question did not feature much in weaker responses. Others presented the review as an afterthought – for instance, 'I give this 5/5' – and did not build meaningful commentary around their experiences. Some candidates spent long paragraphs listing what they knew about photography or different cameras, often unrelated to the course itself. Grammar, punctuation and spelling errors were frequent, as in: 'As soon as I entered the workers there welcomed me with choclates which were amazing and hot Arabic coffee.' Sentence boundaries were often unclear and verb tense usage was inconsistent. Some candidates switched between past and present without purpose, making the structure difficult to follow.

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ENGLISH LANGUAGE

Paper 9093/23
Writing

Key messages

- Candidates should manage their time carefully, allocating an equal amount of time for each section of the paper. Quite often, the time spent on ***Section A*** seemed to have left candidates insufficient time to meet the required word count in ***Section B*** or to satisfactorily complete the task.
- Candidates must understand the importance of writing in clear, properly punctuated English, with accurate sentence demarcation, to perform well in this exam. Punctuation is a vital and essential aid to communication, especially as a guide to the structure of sentences, so it is imperative that candidates know and understand the basics of sentence construction if they are to succeed on this paper.
- Clear expression in simple and compound sentences without much variety is preferable to expression that does not flow, in long, rambling sentences. Often, weaker candidates lose control of grammar when they attempt to write in long, complex sentences. One error that again occurred regularly was that of separating sentences with commas rather than full stops; another common error was writing in sentence fragments. Clear and accurate sentence demarcation is crucial, followed by the accurate use of a wider range of punctuation.
- Candidates should be aware that relevant content in the correct form is a key aspect of the overall assessment of responses for **Question 1(a)** and ***Section B*** tasks. They should focus on answering each aspect of the task, ensuring that all content is relevant. Writing should be purposeful, without rambling or unnecessary filler content.
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- Candidates who have difficulty with tense selection should focus on writing in one tense, preferably either the present tense or the simple past tense.
- Candidates should be encouraged to proofread carefully, particularly for accurate sentence demarcation and for tense confusion/inconsistency. Such errors impede, sometimes seriously, the overall sense of fluency and cohesion.
- Candidates need to ensure that they provide evidence from their text to support points made in the **Question 1(b)** commentary. It is helpful to candidates to use a clear structure for this question, such as a PEA structure (Point, Evidence, Analysis).
- Candidates should be exposed to a wide variety of different text types, as outlined in the syllabus, so that they become familiar with the conventions of a variety of writing forms and purposes. They should be taught key features of those text types, to enable them to replicate these in their own writing.

General comments

Many candidates self-penalised on the grounds of rubric infringement: some ***Section B*** responses were appreciably short of the minimum word limit and a few candidates did not answer **Question 1(b)** at all. Some candidates wrote well over 400 words for **Question 1(a)**, often at the expense of ***Section B***, which was either short or full of errors, possibly indicating that they had run out of time to check their work.

Stronger responses to **Question 1(a)** focused clearly on the question and made for effective blog entries which engaged the peer group audience. They created a sense of enthusiasm for learning and encouraged the audience to learn a new skill. Weaker responses were unclear in terms of the purpose of the blog. These candidates often gave an account of how they learned a new skill without there being any sense of it being their first blog entry. Their ideas were disorganised and sometimes lacked any paragraphing.

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The strongest responses to **Question 1(b)** maintained a close focus on linguistic and stylistic choices, with the relationship between these features being explained and explored successfully. They used relevant terminology consistently and confidently, and language precisely and appropriately. Weaker responses focused mostly, or entirely, on content and therefore only provided minimal analysis by indirectly outlining the structure of the piece.

Stronger responses on ***Section B*** generally had a strong sense of the appropriate form for the task (review, descriptive piece or speech), a clear focus on the question and included appropriate stylistic conventions, as well as relevant content. Weaker responses on ***Section B*** generally contained frequent errors or lacked focus on what the task required. For example, some responses to **Question 2** were simple recounts of the walking tour, with very little in the way of critique or personal opinion, some responses to **Question 3** were more narrative than descriptive, and some **Question 4** responses lacked any sense of being in an appropriate form for a speech.

Comments on specific questions

Section A: Shorter writing and reflective commentary

You have just started learning a new skill. You have always wanted to learn this skill, but you never thought you would be able to. You decide to write a blog about your experience.

(a) Write the text for your first blog entry, using no more than 400 words. In your writing, create a sense of enthusiasm for learning new skills.

Most candidates demonstrated a good awareness of blog conventions, especially the use of a conversational, light-hearted tone, and they approached this question enthusiastically. Subjects ranged from various sports, such as running, basketball, tennis and golf, to hobbies such as massage, origami, playing the guitar, crocheting and cooking. There was typically a strong emphasis on the difficulty of learning a new skill but also a recognition that the process of learning was extremely satisfying. Approaches varied, with some candidates opting for an anecdotal style, citing a long-lost yearning to play the piano, for example. This required 'dusting off my grandma's piano' which briefly evoked memories from childhood, wishing to honour their grandma's memory. Referencing members of a family as 'coaches' in acquiring a new skill was quite a common approach taken, and it came across to the reader as genuine and touching.

Stronger blogs included a range of conventions to organise the text, including catchy titles and sub-headings. These candidates grasped the purpose of the task and clearly outlined the fact that they had *just begun* to learn a new skill, rather than recounting full mastery of it. Such candidates understood the conventions of a blog and used them effectively to build a rapport with the reader. Some responses did include informal lexis, such as, 'So there you go guys, there's my story of how I learned a new skill', which was, in many cases, appropriate, due to the genre. When used judiciously, this informal tone helped establish a conversational and authentic voice.

Many strong responses began with engaging openings that sparked reader interest, such as*:* I've always had a fascination with novel party tricks like juggling or pen spinning.' This kind of introduction set the tone and provided a natural lead-in to the main narrative. Stronger entries often addressed the reader directly, employing questions or reflections, for example: 'Trust me, a little bit of something new can work wonders for your general happiness,' and 'For anyone who has tried something and failed, I encourage you to push through.'

Some responses deployed subject-specific lexis effectively to show a sense of growing mastery of the skill, while not forgetting the need to explain some of this lexis to the more general readership. In this response, the candidate wrote about learning to cook: 'I've always been bad at anything related to the culinary arts, from gingerbread cookies that wail in agony to soup that looks like something out of the Wastelands. I've never been a Picasso or Van Gogh of cooking'.

More successful candidates demonstrated their ability to describe the difficulty of learning the new skill whilst also conveying a sense of enthusiasm. Many encouraged the reader to give it a go by using an encouraging tone and suggesting common barriers to learning the specific skill. One notable blog, in which the writer described himself as 'feeling like Sisyphus struggling to push back against the endless waterfall of years' was written about a course in coding. Another drew this conclusion: 'Every time I fail, it is just more progress to break the barrier and learn and grow.'

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Many weaker entries simply described an activity, without reference to the process of learning the skill. These candidates often adopted a more generalised approach by saying the skill was beneficial without giving any specific examples. Other weaker responses were very short, sometimes of under 150 words, or focussed too heavily on the backstory of why the writer wanted to learn the skill, rather than the process of starting to learn it, hence demonstrating misinterpretation of the prompt. Some responses described an extended journey of practice and eventual mastery, thereby drifting away from the actual requirements of the task. This often resulted in a loss of focus and underdevelopment of key ideas.

In terms of structure, weaker responses were sometimes unfocused or lacked cohesion, with tangential details that distracted from the core narrative. Additionally, many of these responses revealed a struggle to convey a consistent or appropriate tone for a blog. One of the most significant weaknesses was a lack of control over verb tenses. As this task required clear shifts between past and present tenses, for example recounting a past experience while reflecting on it in the present, candidates who did not demonstrate tense accuracy were hindered in both clarity and style. Weaker responses were often brief, lacking in details as to the importance of learning something new. Sentences were undeveloped, as in 'I learned so much' but never saying what or how. Other weaker responses contained frequent errors of all kinds, as in this example: 'Im not tall enought and I do not know how to walk properly. Maybe I did not born to be a model. My body was my insecure and my dream was to big for me.'

(b) Write a reflective commentary on your text, explaining how your linguistic choices contribute to fulfilling the task set.

One approach that worked well for many candidates was to use a Point, Evidence, Analysis format to analyse the form, structure and language of their responses to **Question 1(a)**. They named, one by one, the techniques used, giving precise evidence from their blog entries and explaining the effect on the audience. However, some responses were limited in detail and did not provide any evidence from the **Question 1(a)** response.

Stronger responses displayed candidates' ability to identify key elements of blog writing and demonstrated thoughtful reflection on their language and stylistic choices. For example, some noted their use of the first-person perspective to convey personal experience and their deliberate shift to second person to 'address the audience and create a sense of relatability and intimacy'. This demonstrated clear awareness of both audience and form. A few candidates also acknowledged the typical demographic of a blog audience, often younger readers, and used this to justify their use of colloquial language. Terms like 'so there you go guys' or signoffs like 'Peace out' were explained as part of establishing a more informal register, suitable for the genre and audience. One candidate commented on the importance of their final sentence, 'Why have you not tried something new dear friends?' The analysis was clear: 'This not only appeals to typical features of a blog, by engaging with the reader in a casual manner, but it makes the reader ponder on their own unfulfilled passions as well.'

In addition, stronger responses engaged with lexical choices, noting the use of positive diction such as 'victorious' and 'confident' to foster a sense of empowerment and encouragement. These candidates understood the role of tone in achieving purpose, and linked language choices directly to audience impact. Other candidates gave some precise analysis, such as in this example: 'In addition the author utilizes hypophora within the reflection. They write "Was I afraid of falling? Not really. Was I afraid of proving my parents right? Maybe a little bit. Was I afraid of failing? Probably." The use of hypophora brings a sense of the author's train of thoughts as if going down a list of the author's fears. It brings focus to the fears the author experienced in a concise fashion.'

In many weaker responses, candidates focused almost exclusively on the content of their responses, providing no analysis of their linguistic choices. Weaker responses were lacking terms of construction of the **Question 1(a)** response using specific linguistic techniques, stylistic choices, or an awareness of form. As a result, they were left with very little material to analyse in **Question 1(b)**. Instead of identifying and evaluating specific choices, many summarised the content of their blog or made vague statements about tone or style without supporting examples. They often concentrated on describing structure and format with generalised comments such as, 'I use typical aspects seen in a blog such as paragraph format and a title.'

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In weaker responses, while candidates attempted to explain that their writing was intended to be 'encouraging' or 'relatable', they rarely unpacked *how* these effects were achieved. A common weakness was commenting only on the number of paragraphs or sentence types used – for example, 'I used five paragraphs' or 'I used simple and compound sentences' – without explaining the purpose or effect of these structural decisions. This lack of detail or connection of techniques to intended effects significantly limited the effectiveness of the analysis.

Many weaker responses were also short, included no examples, contained frequent errors or were inappropriate in tone. One typical response included the following vague paragraph: 'The structure of my blog was very organise. It had short or long paragraphs. For languages in my blog, I had imperative verbs throughout my writing to show what tense this writing was on. I included some past tense to my blog. There was some simile sentence in my blog.' Other responses were extremely short, sometimes under 100 words, and in some cases the question was not attempted.

Section B: Extended writing

Question 2 – Review

You recently saw an advertisement for a two-hour city walking tour called *Hidden Secrets*. You went on the tour last weekend. Write a review of this tour, which will be published on a travel website. Write between 600 and 900 words

Many candidates relied heavily on an anecdotal style, with lengthy preambles covering details regarding gatherings in the reception areas of hotels, with commentary on the appearance of the tour guide and other members of the tour. The 'hidden secrets' aspect of the tour was overlooked by some candidates, though it was integrated well by others who followed a clear review form, with some evaluative lexis being included.

In stronger responses, candidates employed a paragraphed, chronological structure – often with the use of headings and sub-headings – to describe the tour, and provided clear recommendations. They used an engaging, informative tone to both describe the walking tour and to address the extent to which it exposed the 'hidden secrets' of the area. They often provided a brief backstory but then focused on reviewing key elements of the tour such as the tour guide, the sights seen, the organisation, and the experience itself.

An effective strategy was to begin with an engaging introduction that captured attention and clearly stated the review's purpose. For example, a candidate wrote: 'One would think that the "secrets" of the beautiful city of Paris would have all been uncovered long ago, but the walking tour my wife and I recently took part in blew that theory out of the water.'

Such candidates established a clear personal voice, for example: 'Initially I was worried that my kids would not enjoy the tour, but they loved it!' They also addressed their audience directly, using phrases like, 'Happy travels everyone!' and employed description to good effect, as in this example: 'There lay cherry blossom trees encapsulating the beautiful architecture.' One candidate, reviewing Panoma Beach, used language to illustrate the beauty of the sea – 'a pool of glistening sea foam' – together with a stop on the tour to marvel at the hidden secrets of 'shells like pearls'

Other candidates employed a humorous or faintly ironic tone with some success, as in this example: 'While I do not doubt that Washington has many hidden secrets, they will remain hidden for eternity if this tour company continues in business. The biggest "hidden secret" on this tour was the "voluntary" added gratuity they charged us at the end of the tour. Secret indeed…'.

Weaker responses were often purely anecdotal with narrative descriptions of the tour, which relied on a chronological approach and offered little in the way of personal feedback or evaluation of whether one should do the tour or not. The review portion was sometimes tacked on at the end in a rather ad hoc fashion that fell short of meeting the task's purpose thoroughly. Some candidates did not name the location, or they made a name up, or place names were vague with no reference or attempt to explore 'hidden secrets.'

Such candidates tended to write a very personal account of a tour, not always of a city, without really addressing the prompt. The purpose and audience were often unclear and structure was weak, leading to disorganised, rambling responses: 'When we finally arrived at the meeting point there were loads of people waiting around and we had to just hope we were in the right group. They were handing out water bottles but we were at the back so we did not get any, and it was a hot day too so we really could have used some water to stop us getting dehydrated.'

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Weaker responses tended to be overly critical without suggesting what would make the tour better, and many were short, sometimes of well under 400 words. Some candidates started with fairly clear introductions that attempted to grab the attention of the reader and mainly stated the review's purpose. However, their language was overly simplistic and failed to address the specifics of the tour, resulting in a monotonous tone that failed to engage the reader.

Question 3 – Descriptive piece

Write a descriptive piece called *The Valley*. In your writing, focus on sound, colour and movement to help your reader imagine the scene. Write between 600 and 900 words.

Some candidates used a narrative frame, which was sometimes successful but occasionally replaced more relevant, descriptive content. A range of interpretations was seen; as well as natural settings of woods and rivers, some interpreted a more urban landscape. Better responses were often linked by the passing of time such as a twenty-four-hour period or the passing of the seasons.

In stronger pieces, the writer maintained focus on the present rather than trying to explain how they had got to the valley. Use of advanced vocabulary and phrasing kept the focus on the sounds, colours and movements in the valley's surroundings, for example: 'A small stone path snaked through the valley like a winding river of rock darting in between the patches of bright flowers.'

Such candidates often made use of sensory language, particularly sound and imagery. One effective example described 'the excited hum of conversation among the bumblebees', which introduced a subtle sense of life and movement to the setting. Another used visual imagery to evoke scale and permanence: 'With the entire valley nestled between them, they stood like stony guards, moving for no one and standing mighty and proud.' The best responses demonstrated rich vocabulary and figurative language throughout, with vivid imagery and striking similes. For instance, one candidate wrote, 'An astonishing sight, a rich kaleidoscope of vibrant blooms sprouting from the lush expanse of grass,' which was both precise and evocative. Another offered an original and humorous sensory comparison: 'Those flowers smell like your dead grandmother's perfume; feminine yet forceful.'

Such moments elevated the work by offering the reader both imaginative flair and concrete detail, hallmarks of higher-level descriptive writing. Candidates who succeeded in this task usually demonstrated stronger technical control, particularly with grammar, spelling and sentence variety, and were more disciplined in maintaining focus on setting rather than drifting into narrative. Another candidate wrote: 'The valley was teeming with life. Millions of years of sharp rain and howling winds had created a deep gash within the crust of the earth. The afternoon sun loomed above the valley as the foliage and animals bathed in the sunlight.'

Weaker responses lacked cohesion, drifted into narrative, or relied too heavily on generic description. Even where some descriptive language was attempted, it was often vague or overused – for example, references to 'birds chirping', 'the sun shining' and 'a peaceful valley' appeared repeatedly without variation or deeper effect. These candidates also tended to rely on basic vocabulary and struggled with sentence control, leading to repetitive phrasing and grammatical inconsistency.

Frequently in very weak responses, candidates misinterpreted the task, shifting into full-blown narrative mode with minimal, or superficial, descriptive content. These responses focused on plot-driven action rather than atmosphere or setting, resulting in a loss of focus on the descriptive requirements of the task. The setting was mentioned briefly or in passing, with little development of sensory experience or concrete detail. Some candidates used the title to write a story about a place called 'The Valley' without creating effective description or focus on sensory imagery. They also changed tenses frequently and were imprecise in their direction and sense of writing style. They described how they had travelled to the valley and often peopled their description with characters who had lengthy backstories. These characters often engaged in conversations, which meant several lines of poorly punctuated speech with no focus on description.

Question 4 – Speech

You are going to take part in a debate at school about whether children should be allowed to use social media before the age of 16. Your headteacher has asked you to open the debate by giving a speech on the topic. Write the text for your speech, discussing both points of view and creating a sense of interest in the debate. Write between 600 and 900 words.

Candidates generally adopted a clear structure, discussing the advantages of allowing 16-year-olds to access social media. Most responses had an opening address and a suitable closing line. However, not all

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candidates included direct address to the audience, making the text more of a discursive essay than a speech. Introductory paragraphs were common, giving some context with regards to the place of social media today. Most arguments were credible, including the need to understand what is happening in the world since newspapers do not attract the average 16-year-old. The importance of maintaining contact with their peers was a common argument. Candidates referenced the pandemic and social isolation as a further strong argument.

Stronger responses showed understanding of the need to present a balanced discussion, addressing both the benefits and drawbacks of social media use among young people. These responses were often structured using effective discourse markers such as 'however', 'in contrast', or 'moreover' to transition between contrasting viewpoints. They also demonstrated an awareness of their audience by using a respectful tone and controlled rhetorical techniques.

More successful candidates often employed logos, pathos, or ethos to establish credibility and connect with their listeners. For example, one candidate cited a relevant statistic: 'A study shows that teens with social media learn 30 per cent more about political and economic issues than teens without social media.' Another appealed to unity and broader social values: 'At the end of the day, social media is a tool that brings people together, not rips them apart.' Such candidates sometimes indicated their personal stance subtly, while still remaining open to other ideas. They were careful not to alienate any portion of their audience and demonstrated maturity in tone, thought, and structure. Their use of evidence, examples, and rhetorical strategies helped to deliver a reasoned and persuasive argument.

Stronger responses reflected in depth on the dangers of social media for young people and many commented on the effect of social media on mental health. A range of rhetorical techniques was employed, which served to pique interest in the audience, as in this example: 'While doomscrolling, social media consumers mindlessly consume more and more vacuous content. Have you ever felt like hours of your life have gone by in an instant while on social media?' Stronger responses provided a concluding paragraph, offering the writer's own point of view or summarising the main points: 'No matter how beneficial social media can be, it is the actual detriments that must, at the end of the day, be taken account of.'

In weaker responses, candidates often struggled to maintain the appropriate register. Many slipped into overly informal language or relied heavily on colloquial expressions and flawed structures. In addition to register issues, weaker responses often focused on a single side of the argument, usually opposing the ban, and presented it vociferously, without acknowledging alternative perspectives. Some responses veered into general arguments about mobile phone use or communication, thereby missing the more specific requirement to address social media and its impact on young people. As a result, these responses tended to lack focus, development and structural coherence.

Other weaker responses lacked paragraphing and demonstrated a lack of technical accuracy, such as in this example: 'The world is to leanient with social media. Social media isnt safe for anyone. Its not the platform. Its the people. The people who let children on these platforms and the people who should have common knawlege for children.'

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ENGLISH LANGUAGE

Paper 9093/31
Language Analysis

Key messages

In Paper 31, candidates are required to respond to two compulsory questions. The topic for **Question 1** in **Section A** is *Language change* and the topic for **Question 2** in **Section B** is *Child language acquisition*. Each of the two compulsory questions have 25 marks available, meaning that the question paper as a whole carries 50 marks.

The main requirement in both compulsory questions is for responses to present analytical findings drawn from the stimulus material. Ideas need to be evidenced throughout by data selected from the texts supplied. Furthermore, points raised are required to contain references to the relevant area of wider study of the topic.

General comments

In June 2025, several responses to both sections of the question paper were brief, meaning ideas were underdeveloped, and responses focussed mainly on presenting their understanding of linguistic concepts, models and approaches rather than selecting data from the stimulus material.

In **Question 1**, Assessment Objective 5 is weighted more heavily at 15 marks, therefore, there is an expectation of a more in-depth engagement with the given data. In **Question 2**, conceptual references need to be tied relevantly to selected data because of the weighting of Assessment Objective 4 (15 marks).

Comments on specific questions

Section A

Question 1 – Language change

This question requires candidates to read Texts A, B and C and analyse how the texts exemplify the various ways in which the English language has changed over time. Text A was extracted from the opening of *The Quality Papers*, a magazine of short stories, published in 1827. Text B was a word table illustrating the top five modifying adverbs found with *conceited* taken from the Early English Books Online Corpus (1470s – 1690s) and the English Web Corpus (2020). Text C was an *n*-gram graph for the words *shew* and *show* (1780 – 2000).

Writing

Analyses tended to be set into a clear and usually logical sequence of paragraphs. Candidates tended to organise their work according to a series of linguistic frameworks which included grammar, syntax, morphology, semantics or pragmatics. In limited responses, lexical or graphological frameworks were those most frequently used.

Some sophisticated analysis was seen where candidates had made use of technical terminology fluently and with ease although there were also some terminological inaccuracies, with a minority of candidates incorrectly identifying the modifying adverbs in Text B as adjectives, despite the question stem making this clear. This suggests that closer attention to word class and grammatical precision is required.

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In June 2025, some responses included reference to irrelevant material such as accounts of historical periods including the Roman, Nordic or French invasions of Britain. These tended to be offered as an introduction to the main body of the analysis. Candidates could be reminded that analytical responses do not need lengthy introductions and could result in wasted examination time. The same can be said of conclusions which repeat material which has already been seen in the main body of the response.

Conceptualisation

Most responses commented on the process of standardisation, relating prescriptive grammar influences, such as those of Robert Lowth or other 18th-century grammarians to the discussion. Greater awareness of prescriptivist and descriptivist views, for example those of Honey, Crystal or Aitchison and their connection to punctuation norms or syntactical device would strengthen responses. There was appropriate reference to Johnson's Dictionary (1755) and the role of the printing technology in promoting linguistic consistency. These ideas were often well-integrated with some relevant sociological comment and demonstrated sound understanding of internal and external influences on language change.

More effective responses cited Romaine, Fairclough or Goodman in analyses of levels of formality and how informalisation maybe a driver for gradual change in the English language. Less convincing were arguments which sought to translate perceived archaic constructions into contemporary English to illustrate points regarding levels of formality without recourse to theoretical models or approaches.

Halliday was usually relevantly cited in terms of what was described by most candidates as 'functional theory' and also more clearly as the theory of lexical gaps. However, random fluctuation (Hockett) or cultural transmission (Bandura et al) were generally not attributed even though they were the were the approaches most often suggested to account for changes.

The concepts of pejoration, amelioration, narrowing and broadening were often applied to consideration of 'conceited' as seen in Text B although there was some inaccuracy seen in such labelling. Jespersen's notion of the Great Vowel Shift was frequently applied to account for the orthographical change in *shew* for *show* seen in Text C. 'Industrialisation' and even 'globalisation' were also offered as reasons for change seen in Text C, sometimes with limited arguments. More useful were references to Chen's S curve model which was easily identified in the *n*-gram graph or to Aitchison's PIDC model.

Data handling

In June 2025, there was a tendency for weaker responses to include fewer items for analysis from the stimulus which led to surface-level analysis. In basic responses only items from the notes at the foot of Text A drew commentary. There was also a tendency to label those items which might be outside a candidate's everyday lexicon as 'archaic' or 'obsolete' although such items may have been more accurately described as 'low frequency' which should have been expected from a prose text of 1827. Lexemes from Text A inaccurately labelled in this way included *quest, illuminated, ascertain, graced* and *paunch*.

Limited responses mainly focused on the punctuation in Text A, with attention to what was often described as 'unusual spacing' between *Ryde* and the question mark, and then *RISE* and *EARLY!* There was further similar discussion of the use of the '.,' after *Dr. B*, the use of italics, capitalisation, the asterisks replacing the name in line 19, moving on to the use of semi colons, dashes, commas and the length of sentences. However, clearer responses progressed to lexical analysis which included *thither, beget, paunch,* or *lowermosts*. Nonetheless, a common error was noted where candidates had indicated that *beget* was from the French 'baguette'.

Although in contemporary English the inappropriateness of describing someone as *portliest* was frequently discussed, only effective or sophisticated responses extended commentary to make a deeper morphological analysis of the inflection *–est* even though there were a number of incidences of this seen in Text A.

In June 2025 analyses were more synthesised than those seen in previous examination sessions. For example, clear and more effective responses drew findings together from Texts A and Texts C in consideration of the lexeme *shew*. However, there was still the tendency to organise responses with analysis of Text A, moving to a separate analysis of Text B and then a further separate analysis of Text C. This approach usually led to brief descriptions of the data in Text C where time may have become an issue during the examination.

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Section B

Question 2 – Child language acquisition

The stimulus material for **Question 2** comprised a transcription of a conversation between Izzy (age 3 years) and her mother who were at home, having breakfast. Candidates were required to analyse ways in which Izzy and her mother are using language in this conversation. In their responses, candidates were further required to refer to specific details from the transcription, as well as to ideas and examples from their wider study of child language acquisition.

Understanding

Almost all responses demonstrated a clear understanding of the conventions of Conversation Analysis Transcription with only very few commenting that both the child and the mother were at fault in their lack of use of punctuation. The transcription provided many opportunities for comment on characteristic features, but basic or limited responses selected only those features which had been indicated in the transcription key.

Characteristic features which could have been identified for analysis in terms of how the mother was using language included her frequent separation of clause with pause and micropause, her questioning technique of using pitch variation in both closed and open questions, for example *are you going to eat yours↗* and *what do we need to do↗*, her use of plural pronouns to indicate the close relationship between herself and Izzy and joint activity in *lets blow on it*, recasting of Izzy's emerging phonological competence rather than explicit correction, and maintenance of her level of politeness in controlling behaviour, for example *dont stand on that chair please*.

With regard to characteristic features illustrated in the child's utterances, opportunities for identification and analysis included Izzy's residual substitution of phoneme /r/ in */pɒwɪdʒ/↗* and */kæwɪ/* even though she appeared able to produce the consonant cluster in *wobbly*, reception and transmission of negation, competence in turn-taking with one minor lapse, initiation and fulfilment of adjacency pairs, omission of auxiliaries – occasionally coupled with emphasis as in *I NOT LIKE IT*, pitch variation in questioning and stressed syllable as in *coat*. Subject verb agreement appeared as virtuous error at times as in *daddy like /pɒwɪdʒ/* although there was clear cognition in comparing states as in *too wobbly* and *too hot*.

Most responses demonstrated an understanding of a selection of the characteristic features shown above. More effective responses described features fully and labelled using technical terminology with consideration not only being to what the features were but also why they were being used.

Conceptualisation

Some responses used only the child's age to identify that Izzy had reached the telegraphic stage of language acquisition. However, more effective responses provided differential diagnoses using analysis of her utterances to illustrate that whereas at times her speech had telegraphic tendencies there was some clear evidence that she had progressed into the post-telegraphic stage.

This was similar to the way in which only the child's age was used to identify which of Piaget's stages of cognitive development Izzy had reached. Where it was stated that she remained in the sensorimotor stage, the argument became implausible as there was clear evidence (including her egotistical utterances) that the preoperational stage was more accurate.

Most candidates introduced Skinner's notion of behaviourism to an extent. There was clear evidence of positive and negative reinforcement in the mother's utterances, for example in *thats it* and *we're not going yet* respectively.

A number of Hallidayan functions of spoken language were evident in the transcription with clear responses correctly identifying the personal function in *I NOT LIKE IT*, the regulatory function in */kæwɪ/ me* and the heuristic function in *we /gəʊɪn/ see papa tom↗.* At times, there was mislabelling of these functions and at times they were described as 'stages' which led to an impression of limited understanding of Halliday's approach.

In effective responses, details according to Bellugi's Stage 3 of language acquisition were referenced as Izzy was seen to use a variety of pronouns, including person, subject, number and possession – further evidence that Izzy had progressed into the post-telegraphic stage.

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As in previous examination sessions, Chomsky was frequently cited but comments were not always tied to identification of characteristic features from the transcription. This was similar to the way Vygotsky's Zone of Proximal Development was introduced. The Vygotskyan approach was often discussed but evidence from the text was not always supplied although the mother could be seen to scaffold the child into constructing a list, for example in lines 20 and 23.

Data handling

In June 2025, some responses were limited in their selection of data for analysis, relying more on identifying features for generalised discussion rather than demonstrating keen analytical skills.

Analysis should include exploration of how the grammatical structure of specific utterances supports the identified feature or by examining word choice and selection in relation to how it might function in a communicative role. For example, Izzy's repetition in *i like /pɒwɪdʒ/ (.) mummy like /pɒwɪdʒ/ (.) daddy like /pɒwɪdʒ/ (1) what bout nanny and papa tom↗ /deɪ/ like /pɒwɪdʒ/↗* provides a clear example of how she seeks to build social connections. Here, the coordinated simple clauses and use of familiar nouns reflect her developmental stage, while the rising intonation suggests she is prompting a response — showing emerging pragmatic competence in her understanding of turn-taking.

Clear, effective or even insightful responses attempted phonological analysis although these varied in their accuracy and precision. Often, Izzy's substitution of the voiced plosive /d/ in place of the voiced fricative in /*deɪ*/ was inaccurately labelled as consonant cluster reduction. Similarly, the rhotic /*r*/ was described as a plosive phoneme at times. Her pronunciation of /*suːz/* was also mislabelled with some limited descriptions stating that she was 'not able to pronounce the letter h'. Candidates are reminded of the difference between graphemes (used in written language) and phonemes (used in spoken language and as seen in Conversation Analysis transcription).

The child's pronunciation difficulties were frequently described as 'mistakes' whereas in there were many instances of emerging competencies, for example in *we /gəʊɪn/* where Izzy's deletion of the final /g/ may indicate imitation of the caregiver's more colloquial production of continuous present tense at other times – a possible further indication of how a young child might use language to establish her position in a close social setting.

Overall, although clear to effective analysis was seen at times in June 2025, Data handling was the least well addressed of the three assessment objectives. This was due mainly to fewer selections being made from the transcription and reliance on generalised descriptions of identified features.

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ENGLISH LANGUAGE

Paper 9093/32
Language Analysis

Key messages

Paper 32 presents stimulus material in ***Section A –*** *Language change*, and ***Section B –*** *Child language acquisition*. Candidates are required to provide two sustained and cohesive analytical responses by making a careful selection of data from each of the texts provided, and to support their analysis with relevant knowledge and understanding from their wider study of the two language topics.

Each section of the question paper carries 25 marks, giving 50 marks overall. Assessment Objectives 2, 4 and 5 are applied in Section A, and in Section B, Assessment Objectives 1, 4 and 5 are applied.

General comments

In June 2025, there were some brief responses particularly to ***Section B*** of the question paper which meant that there was a lack of development of ideas. In general, responses focused mainly on presenting linguistic concepts, models and approaches rather than selecting data from the stimulus material.

However, in **Question 1**, it is Assessment Objective 5 which is weighted more heavily at 15 marks therefore there is an expectation of a more in-depth engagement with the data. In **Question 2**, conceptual references were tied relevantly to selected data because of the weighting of Assessment Objective 4 (15 marks).

Comments on specific questions

Section A

Question 1 – Language change

The stimulus material for **Question 1** comprised three texts. Text A was the opening of an essay published in 1773 about the mineral water found naturally in the Liverpool area of England; Text B was a word table illustrating five of the top collocates for 'spa' from the Early English Books Online Corpus (1650s – 1780s) and the Cambridge International Corpus (1980s – 1993), and Text C was an *n*-gram graph for the words 'acidulous' and 'acidic' (1760 – 1980).

Candidates were required to read Texts A, B and C and analyse how Text A exemplified the various ways in which the English language has changed over time. In their responses, they were further required to refer to specific details from Texts A, B and C, as well as to ideas and examples from their wider study of language change.

Writing

Although responses were brief at times, most analyses were set into a clear and usually logical sequence of paragraphs. Candidates had also tended to organise their work according to a series of linguistic frameworks. In limited responses, lexical or graphological frameworks were those most frequently used whereas clear or effective responses presented analysis led by commentary on grammar, syntax, morphology, semantics or pragmatics.

Some sophisticated analysis was seen in responses that used technical terminology fluently and with ease although there were also some terminological inaccuracies, with a minority of candidates incorrectly identifying the collocates in Text B as 'replacement words', despite the question stem making this clear. For examples, some basic responses claimed that the words *treatment* and *waters* had changed their meanings

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to become *pamper* and *whirlpool* respectively. This suggests that closer attention to word class and grammatical precision is required.

In June 2025, some lengthy introductions were seen which contained information that was not relevant to the stimulus material. These usually included accounts of historical periods which had gone before any of the publication dates of the texts provided and were therefore not plausibly discussed. Candidates could be reminded that analytical responses do not need lengthy introductions and can result in wasted examination time. A more productive approach would be to begin immediately by setting Text A on a timeline, which in this case would have been just inside the upper date limit of Early Modern English.

Conceptualisation

The most frequently cited reference to Text A was that to Halliday's Systemic Functional Linguistics, usually weakly described as 'Halliday's functional theory'. Halliday was generally referenced in terms of the ideational metafunction where the passive voice was noted to structure information to emphasise processes and outcomes rather than agents. A small number of responses referred to the Latinate structures in the text, but did not always successfully connect this to Latin's enduring influence on scientific discourse — a point well-articulated in the work of theorists such as David Crystal.

Levels of formality were frequently discussed, though not always in terms of the scientific register presented in Text A, nor was the concept of scientific advancement as a driver for language change. However, the concept of prescriptivism was referenced by most candidates as was the opposite concept, descriptivism, though seldom attributed as a specific theorist's approach. More effective responses cited Romaine, Fairclough or Goodman in analyses of how informalisation may be responsible for gradual change in the English language. Less convincing were arguments which sought to translate perceived archaic constructions into contemporary English to illustrate points regarding levels of formality without recourse to theoretical concepts or approaches.

A number of responses referred to random fluctuation theory although not all attributed it to Hockett, leaving the reference incomplete. There was generally, however, a clear identification of how seemingly minor and 'random' variations which may have begun in error in language use can, over time, lead to one form becoming dominant. While this occasionally lacked depth, it nonetheless demonstrated a willingness to engage analytically with the data provided, particularly in Text B.

A smaller number of responses accurately applied Chen's S-curve model to findings from Text C, though even fewer analysed the change through its three key stages: innovation, acceleration and stabilisation. Those who did were able to offer more nuanced, theory-driven commentary. A greater number of effective responses referenced Aitchison's three stages of language change — slow emergence, rapid growth, and final stabilisation — and applied these or their understanding of Aitchison's PIDC model to their findings from Text C.

The concepts of pejoration, amelioration, narrowing and broadening were often applied to consideration of 'spa' as seen in Text B although there was some inaccuracy seen in such labelling – where broadening would have been the most precise. There was also evidence of speculative etymological analysis of the lemma which led to ideas on the concept of borrowing. French was usually seen as the loaning superstrate (spa derives from the Belgian town of Spa but it was not expected that this should be known).

Data handling

In June 2025, there was a tendency in limited responses to label those items which might be outside a candidate's everyday lexicon as 'archaic' or 'obsolete' although such items may have been more accurately described as 'low frequency' which should have been expected from a prose text of 1773. Lexemes from Text A inaccurately labelled in this way included *inattention, impregnated* and *pungent*.

There were some thoughtful comments on the graphological features. Some responses noted its distinctive graphological conventions, such as the prominent use of section headings *PREFACE* and *§ i. Of Mineral Waters* in general, recognising these as precursors to the structured formats seen in later academic and scientific writing.

Others discussed orthographic features, including the use of the long s (ſ) in words such as *diſcovered, uſed*, and *poſſeſs'd*. These were mainly accurately identified as typographical conventions typical of 18th-century printing, which gradually disappeared by the early 19th century. There were also references to elided spellings (for example in *promis'd, fix'd* and *poſſeſs'd*), with a number of responses linking these to older

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stylistic conventions and poetic influence. However, some limited responses made links to Shakespeare, which tended to be implausible.

Most responses made successful observations about capitalisation, identifying how both concrete nouns (*Spring, Stone Quarry, Spa Water*) and abstract concepts (*Virtues, Humanity, Society*) were capitalised. This was correctly linked to the lack of standardisation in 18th-century English, as well as to typographic conventions that assigned emphasis or social status through visual prominence.

In analysis of Text C, more effective responses tracked how *acidic* initially gained recognition within scientific circles (innovation), subsequently increased in popularity as it aligned with broader trends in scientific discourse (acceleration), and ultimately became embedded in usage, superseding the more archaic acidulous (stabilisation). An in-depth morphological analysis of these two lexemes was seen only in insightful analyses, however.

In general, there was still the tendency seen in previous examination sessions to organise responses with separate analyses of Text A, Text B and Text C. This approach usually led to brief descriptions of the data in Text C where time may have become an issue during the examination. More effective and fuller responses applied analytical skills to all three texts in ***Section A*** of the question paper.

Section B

Question 2 – Child language acquisition

The stimulus material for **Question 2** comprised a transcription of a conversation between Faizal (age 2 years) and his mother which had taken place at home. Candidates were required to analyse ways in which Faizal and his mother were using language in this conversation. In their response, candidates were further required to refer to specific details from the transcription, as well as to ideas and examples from their wider study of child language acquisition.

Understanding

All responses demonstrated a clear understanding of the conventions of Conversation Analysis Transcription. The transcription provided many opportunities for comment on characteristic features but basic or limited responses selected only those features which had been indicated in the transcription key.

Characteristic features which could have been identified for analysis in terms of how the mother was using language included her extended responses to Faizal's interrogatives as seen in *a snowman is where we roll lots of snow into a big big ball and make it look like a man*, her questioning technique which provided a variety of closed, open and tag questions as in *you like your red hat (.) yes↗* and *what else would we need to make it look like a man↗,* her use of inclusive plural pronouns, for example, *shall we go and find our warm clothes*, and her choice to recast rather than explicitly correct Faizal's pronunciation difficulties.

In terms of how the child was using language, characteristic features which were present for identification included substitution of phoneme /r/ in */wed/* and consonant cluster reduction in */fʌfɪ/ /bɒl,* deletion of final phoneme and plural in /pebuː/, omission of the copula verb and indefinite article in *what snowman↗,* fulfilment of adjacency pairs, clear understanding of turn-taking with minimal interruption, intonation technique including pitch variation, stressed syllable and volume increase (for example in *go <u>now</u> (.) we go NOW mummy*, repetition, mirroring of the mother's syntactical patterns, ability to express preferences, the emergence of negation and understanding of temperature, as seen in *i cold mummy* and *warm clothes*.

Most responses demonstrated an understanding of some of the characteristic features shown above. Responses became more effective when features were described fully and labelled using technical terminology with consideration not only being to what the features were but also why they were being used.

Conceptualisation

Limited to clear responses had used only the child's age to identify that Faizal had reached the holophrastic or telegraphic stages of language acquisition. More effective responses provided evidence from the range of characteristic features listed above to consolidate their differential diagnosis. Some basic responses interpreted Faizal's utterances set into phonemic representation as an indication that he remained in the babbling stage which was incorrect.

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There was frequent clear citation of major theorists, for example Skinner, Vygotsky and Bruner with reasonable explanations for their inclusion being provided. More effective responses progressed beyond Skinner's operant conditioning by integrating Vygotsky's Zone of Proximal Development, illustrating how Faizal's mother was scaffolding his language acquisition, *for example by explaining a snowman is where we roll lots of snow into a big big ball.* Most responses also applied Bruner's Language Acquisition Support System (LASS) with varying degrees of clarity, highlighting the mother's use of questions, prompts, and shared routines as in *shall we go and find our warm clothes now then?*

Effective responses incorporated Nelson's criticism of Motherese, arguing that Faizal's own language use and interaction with his environment might be more crucial to his development than the specific style of maternal speech. The Fis Phenomenon was also introduced to demonstrate the extent of which Faizal's level of understanding outweighed his level of production, as seen in *i like /fʌfɪ/ /bɒl/ it tickle.*

Piaget's theory of cognitive development was generally well applied, with appropriate references to the transcript in terms of his acquisition of object permanence and examples of egocentricism indicating the preoperational stage. Nevertheless, some candidates incorrectly placed Faizal in the sensorimotor stage without taking account of characteristic features which illustrated that he had progressed beyond that. These could have included him knowing that he should *not eat /pebuː/* which was a demonstration of him not only remembering that she should not eat pebbles but also that he is able to articulate that memory.

A number of Hallidayan functions of spoken language were evident in the transcription with clear responses correctly identifying the personal function in *i like /spaɪz/*, the regulatory function in *we go NOW mummy* and the heuristic function in *what snowman↗.* At times, there were inaccuracies in the labelling of these functions and at times they were described as 'stages' which led to an impression of limited understanding of Halliday's approach.

As in previous examination sessions, Chomsky was frequently cited but comments were not always tied to identification of characteristic features from the transcription. Further weak or incomplete references were made to some referred to Genie and the critical period with some citation of Lenneberg.

Data handling

In June 2025, some responses were limited in their selection of data for analysis, relying more on identifying features for generalised discussion rather than demonstrating keen analytical skills. This led to an imbalance noted between Assessment Objective 1 – Understanding and Assessment Objective 5 – Data Handling. Some responses which demonstrated at least a clear if not detailed understanding of the transcription provided little or no data selection, which was problematic given the task's focus. Close, consistent engagement with the transcript is crucial to an effective response.

Candidates are further reminded that analysis should include exploration of how the grammatical structure of specific utterances supports an identified feature or by examining lexical choice in relation to how it might function in a communicative role.

Clear, effective or even insightful responses attempted phonological analysis although these varied in their accuracy and precision. Often, Faizal's substitution of the voiced plosive /d/ in place of the voiced fricative in /*deɪ*/ was inaccurately labelled as deletion. Similarly, the rhotic /r/ was described as a plosive phoneme at times. However, more precise labelling was seen in analysis of *i like /speʃə/ (2) and i like /spaɪz/* with deletion of liquid /l/ in */speʃə/* and assimilation of initial syllable together with consonant cluster reduction in */spaɪz/.*

In limited analyses, the child's pronunciation difficulties were frequently described as 'mistakes' whereas there were many instances of emerging phonological competencies, thus a deficit approach had been taken. Responses could instead have explored Faizal's mirroring of the mother's lexical choices and syntactic pattern, including tag question seen in *you got /wed/ hat↗ (.) yes↗* a possible further indication of how a young child might use language to establish his position in a close social setting.

Overall, although effective analysis was seen at times in June 2025, Data handling was the least well addressed of the three assessment objectives. This was due mainly to fewer selections being made from the transcription and reliance on generalised descriptions of identified features.

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Paper 9093/33
Language Analysis

Key messages

In Paper 31, candidates are required to respond to two compulsory questions. The topic for **Question 1** in **Section A** is *Language change* and the topic for **Question 2** in **Section B** is *Child language acquisition*. Each of the two compulsory questions have 25 marks available, meaning that the question paper as a whole carries 50 marks.

The main requirement in both compulsory questions is for responses to present analytical findings drawn from the stimulus material. Ideas need to be evidenced throughout by data selected from the texts supplied. Furthermore, points raised are required to contain references to the relevant area of wider study of the topic.

General comments

In June 2025, there were some brief responses to both sections of the question paper which led to undeveloped ideas. In general, it seemed that candidates had not fully observed the weighting of the assessment objectives which is different in the two sections. Even in some clear responses to **Question 1**, they seemed to include as much evidence of wider study as possible, rather than to provide an in-depth analysis of the language data. Conversely, some clear responses to **Question 2** touched lightly and quickly on linguistic models and approaches yet offered full explanations of minor characteristic features which had been spotted in the transcription. Candidates could be reminded of the assessment objective weightings to address this issue.

Comments on specific questions

Section A

Question 1 – Language change

The stimulus material for **Question 1** comprised three texts: Text A was an article about cooking, published on the Good Housekeeping website in 2023; Text B was a word table illustrating five of the top collocates for 'epic' taken from the Early English Books Online Corpus (1470s – 1690s) and from a corpus of online English (2020 – 2022), and Text C was *n*-gram graph for 'microwave oven' and 'air fryer' (1950 – 2019).

Candidates were required to read Texts A, B and C and analyse how Text A exemplified the various ways in which the English language has changed over time, by referring to specific details from Texts A, B and C, as well as to ideas and examples from their wider study of language change.

Writing

Overall, analyses tended to be set into a clear and usually logical sequence of paragraphs. Candidates had also tended to organise their work according to a series of linguistic frameworks. In limited responses, lexical or graphological frameworks were those most frequently used whereas clear or effective responses presented analysis led by commentary on grammar, syntax, morphology, semantics or pragmatics.

Some sophisticated analysis was seen where candidates had made use of technical terminology fluently and with ease although there were also some terminological inaccuracies, with a minority of candidates demonstrating misunderstanding of the concept of collocation as shown in Text B. This suggests that closer attention to word class and grammatical precision is required.

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In June 2025, although clarity and control of expression was generally clear, some material was presented which was not made relevant to the task. This tended to be offered as an introduction to the main body of the analysis. Candidates are reminded that analytical responses do not need lengthy introductions and can result in wasted examination time. The same can be said of conclusions which merely repeat material which has already been seen in the main body of the response.

Conceptualisation

Most responses commented on the processes of standardisation and informalisation, relating descriptive grammar influences on linguistic creativity, such as the invention and widespread use of the internet and social media, to language change as seen in Text A. Crystal was briefly cited in limited responses although more effective responses referenced Romaine, Fairclough or Goodman in analyses of levels of formality and how informalisation maybe a driver for gradual change in the English language. Fairclough was also cited in terms of synthetic personalisation as seen in the direct address to the audience in Text A, for example with the rhetorical *Curious about exactly what an air fryer is?*

Halliday was usually relevantly cited in terms of what was described by most candidates as 'functional theory' and also more clearly as the theory of lexical gaps. Random fluctuation (Hockett) or cultural transmission (Bandura et al) were generally not attributed even though they were concepts frequently suggested to account for changes. Some responses selected from the range of hyphenated examples such as *all-purpose*, *cult-status* and *perfectly-seared* to illustrate random fluctuation in the development of compounding over time.

The concepts of pejoration, amelioration, narrowing and broadening were often applied to consideration of 'epic' as seen in Text B although opinions varied on which of these four concepts could be most accurate label. Jespersen's notion of the Great Vowel Shift was frequently introduced as evidence of wider study of the language topic, as was Johnson's dictionary of 1755, Caxton's printing press of 1476 and the influence of Shakespeare, although these references were not made entirely relevant to the stimulus material. Industrialisation and even globalisation were also offered as reasons for change seen in Text A and these were much more plausibly introduced. Additionally, references to Chen's S curve model or to Aitchison's PIDC model were useful in exploration of Text C.

Data handling

Text A offered many opportunities for language analysis. Most candidates engaged with the playful nature of lexical and grammatical items presented by the text originator. Those which drew the most frequent attention included the clipping in *mozz* and diminutive in *veggies* and the rhythmic or humorous qualities offered by examples of alliteration such as *crispy, crunchy and craveable*.

Although Text A contained many incidences of stylistic features of contemporary popular journalism, for example the use of conjuctions *And* and *But* to begin sentences, incomplete constructions as in *So. Much.* and the inclusion of hyperlinks, there were examples of lexical items from classical Greek and Roman literature which provided contrast in line 7 with *ode* and *epic* used to construct hyperbole. These items enabled synthesis of commentary using Texts A and B.

Text B was generally interpreted well although some basic responses demonstrated misunderstanding of the nature of collocates, stating that the word table illustrated changes in meaning of the items so that 'majesty now means fantasy and tragedy now means failure' which is incorrect.

Only very few responses undertook morphological analysis of the items in Text C where the peak shown for *microwave oven* in 1990 could indicate wider reception and public interest in scientific or technological advancement in the late 20th century as well as the development of compounding. The sharp incline after 2015 of *air fryer* could provide further evidence of informalisation in a move away from the scientific register of *microwave,* and the widespread unquestioning acceptance of nonsensical nature of the name of the appliance as it is not possible to fry air.

In June 2025 analyses were more synthesised than those seen in previous examination sessions. In general, there was still the tendency seen in previous examination sessions to organise responses with separate analyses of Text A, Text B and Text C. This approach usually led to brief descriptions of the data in Text C where time may have become an issue during the examination. More effective and fuller responses apply analytical skills to all three texts in ***Section A*** of the question paper.

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Section B

Question 2 – Child language acquisition

The stimulus material for **Question 2** comprised a transcription of a conversation between Otto (age 5 years), Felix (age 8 years) and their mother. The interlocutors were at home, playing a board game.

Candidates were required to analyse ways in which Otto, Felix and their mother were using language in the conversation. In their responses, candidates were further required to refer to specific details from the transcription, as well as to ideas and examples from their wider study of child language acquisition.

Understanding

All responses demonstrated a clear understanding of the conventions of Conversation Analysis Transcription. However, although the transcription provided many opportunities for comment on characteristic features, basic or limited responses selected only those features seen in the text which had been indicated in the transcription key.

Characteristic features which could have been identified for analysis in terms of how the mother was using language included the way in which she had adopted the role of mediator by using language to address behaviour and to progress the activity, her choice not to correct or recast any deviation from standard grammar or pronunciation which may be perceived as different from the usual methods of child directed speech (for example in *it doesnt matter how he says it felix (2) we all know what he means)*, her use of timed pause and micropause to assist the children's understanding, and her use of simple polite yet direct forms in mainly declarative structures such as *felix you need to be more kind to your brother please*.

With regard to characteristic features illustrated in the children's utterances, opportunities for identification and analysis included fulfilment of adjacency pairs with some interruption to the turn-taking, ease with negation and contraction as in *no i did not,* Otto's residual virtuous errors in construction, for example, *i can not do it cos hes putting me off to think*, use of the diminutive *mummy* from Otto and the contrasting clipped *mum* from Felix, prosody including raised and decreased volume, pitch variation for closed and open questions, repetition and use of emphatic stress, for example in *fell over not falled over*.

Most responses demonstrated an understanding of a selection of the characteristic features shown above. However, responses became more effective when features were described fully and labelled using technical terminology with consideration not only being to what the features were but also why they were being used.

Conceptualisation

Limited or clear responses had used only the children's ages to identify that Otto had reached the post-telegraphic stage of language acquisition and that Felix is continuing his language development beyond the initial stages.

Evidence from the transcription was selected in most responses to indicate that Otto may still remain in the preoperational stage according to Piaget; given the age of Felix it was generally stated that he should have reached the concrete operational stage. Clear or effective responses used evidence to substantiate claims including that of understanding of cause and effect and inductive reasoning in Felix's utterance: *and you should know that from school*.

A number of Halliday's functions of spoken language were evident and most responses described the way in which Felix used the regulatory function in *say it properly* as well as the representational function in *he sounds like a baby*. On the other hand, Otto's utterances were seen to demonstrate the personal function, for example in *my knees hurty* and the mother's language being used in an interactional way, as in her *lets get on with the game.* Some insightful responses had selected and differentiated these functions to illustrate how each of the interlocutors had used language to establish their individual roles in the conversation.

Most responses described the way in which the mother was using scaffolding to encourage Otto. Some attributed this to Bruner's Language Acquisition Support System rather briefly although more effective responses referenced the mother as Vygotsky's More Knowledgeable Other, somewhat accurately stating that her approach using initiation, response and feedback was designed to bring Otto into a zone of proximal development. Evidence for this was provided in *so ive shaken a three and a five (2) how many does that make* ↘ and the following utterance: *nearly right otto (1) we need a bigger number than seven*.

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Although Chomsky and the Language Acquisition Device, as in previous years, was introduced but generally not thoroughly explained, effective responses demonstrated understanding of the notion of Universal Grammar by including Otto's natural use of the English morphological rule for numbers in *eleventy twelve*.

Data handling

In June 2025, some responses were limited in their selection of data for analysis, relying more on identifying features for generalised discussion rather than demonstrating keen analytical skills.

Limited responses tended to describe items presented as phonetic representation as 'mistakes', taking a deficit approach rather than attempting to provide evidence of progression through cognitive development and phonological competence which is almost complete apart from Otto's rhotic phoneme substitution in*/wɪpʌnd/*.

There was some clear analysis of grammatical forms, however, using the same item, */wɪpʌnd/*, to discuss overgeneralisation of past tense, and reduplication of comparative *be more kinder* in which Otto has ignored his mother's modelling of the correct form. Tense was also considered in Felix's utterance *i havent complained did i mum* ↘ in a somewhat generalised manner although this selection is an example of how children at eight, and who are in the continuing development stage of acquisition, may have residual grammatical or syntactical difficulties in extended spontaneous constructions.

Overall, although clear to effective analysis was seen at times in June 2025, Data handling was the least well addressed of the three assessment objectives. This was due mainly to fewer selections being made from the transcription and reliance on generalised descriptions of identified features.

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ENGLISH LANGUAGE

Paper 9093/41
Language Topics

Key messages

The overall title for 9093 Paper 41 is *Language topics*. The question paper is set into two sections, each containing one compulsory question. Each question carries 25 marks, with 50 marks being available for the question paper as a whole. For each question, there is a specific question frame, pertinent to the stimulus material and appropriately relevant to a particular aspect of the language topic.

The topics considered in Paper 41 are *English in the world* provided in the question paper in ***Section A***, as **Question 1**, and *Language and the self*, positioned as **Question 2** in ***Section B***. Assessment Objectives 1 (Understanding **–** 10 marks), 2 (Writing **–** 5 marks) and 4 (Conceptualisation **–** 10 marks) apply to both questions.

General comments

The main requirement in Paper 41 is for candidates to provide sustained, discursive essays in response to the focus of the question. As in previous examination sessions, at times there was evidence that analysis of the stimulus material had been undertaken, with responses containing commentary on the text originator's use of language. This was seen more in responses to **Question 2** rather than in those to **Question 1**. Such analysis is not required in Paper 41 and any response comprising such material ran the risk of becoming irrelevant.

In June 2025, despite the engaging nature of the stimulus material, some responses were rather brief, particularly in ***Section B***, meaning that ideas remained undeveloped. Moreover, particularly in responses to **Question 1**, there was a good deal of evidence of candidates wanting to present the entirety of their understanding of the broader language topic instead of selecting what they considered to be the most important points raised in the text. This led to loss of focus and a lack of development of any main, relevant points.

Nonetheless, some clear to effective work was seen at times, mainly in ***Section A***. Such responses retained focus on the ideas presented in the stimulus material and the specific frame of the question. More effective essays provided relevant support drawn from wider study of the language topics and demonstrated clarity and control of expression throughout.

Comments on specific questions

Section A

Question 1 – *English in the world*

The stimulus material for **Question 1** was a series of extracts from the Indian online newspaper The Print, titled *Dear Indians, MTI (Mother Tongue Influence) stigma is just language apartheid. Make English another bhasha*, which was published in 2021.

Candidates were required to discuss what they felt were the most important issues raised in the text relating to the influences on the *use and status of English in an international context*. They were further required to refer to specific details from the text as well as to ideas and examples from their wider study of English in the world.

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Assessment Objective 1 – Understanding (10 marks)

The stimulus material presented a number of points which candidates could select for discussion, including a definition of the linguistic concept described in the text as *mother tongue influence* which is the way international learners of English were taught by teachers who spoke in a regional rather than British or American accent. Further elements for discussion included the overwhelming view of the text originator that Indian learners should *embrace MTI* even though some aspirational Indians are trying desperately to forget their mother tongue and the reasons why Indian speakers of English should be concerned if their accent betrayed their mother tongue if, as the text originator stated, there should be a complete acceptance that the English language has multiple registers, dialects and accents, even in the United Kingdom and beyond.

Most candidates selected at least some of these points although in a large number of limited responses some misunderstanding was demonstrated in discussion of the text originator's view that mother tongue influence should be seen as *normal, natural and healthy*; even some clearer responses had stated that it was the British received pronunciation which the author viewed as *natural* and therefore it was not surprising that mother tongue influence could lead to *cultural inferiority and self-hatred*. Candidates are reminded that close reading of the stimulus material is necessary to gain as much insight into the ideas presented as possible.

As in previous examination sessions, basic or limited responses referred to the stimulus material only minimally, choosing instead to present knowledge and understanding of their wider study of English in the world. Candidates are reminded that even where this knowledge and understanding of the language topic is demonstrated as extensive, focus on the stimulus material should underpin the question frame – in this case the *use and status of English in an international context* and not the other way round.

Assessment Objective 2 – Writing (5 marks)

On the whole, those responses which were sustained were clearly organised into a logical sequence of paragraphs. This controlled approach demonstrated commendable writing skills including clear to effective introductions which provided a succinct precis of the text and gave a brief overview of the points which were to follow. On the other hand, limited introductions provided either a history of the emergence of the English language into its current form, or an extended overview of the language topic. Candidates are reminded that Assessment Objective 2 does not only cover aspects of writing such as spelling, punctuation and grammar: relevance of content and development of ideas are also assessed by applying that AO.

The most cohesive and coherent discussions followed a strong standpoint supported by a logical progression of ideas, well-integrated theoretical citation, and purposeful reference to the text. In contrast, weaker responses often meandered, lacking a stated line of argument or lapsing into general commentary.

Tone and register were generally maintained; clear discourse markers were usually seen to develop ideas or to introduce new points. Some loss of control was evident in responses which were overly long, indicating a move away from the original direction in the writing: extending a response into a continuation booklet does not necessarily mean that the essay has remained focused and relevant. On the contrary, it is more likely that the writing is not succinct, that the essay may have become repetitious or that some of the material presented is not relevant.

Assessment Object 4 – Conceptualisation (10 marks)

In June 2025, a wide range of linguistic issues, concepts, models and approaches were referenced, usually relevantly and accurately.

Kachru's model of concentric circles was the most frequently-cited theory and understandably so, as it offers a clear, accessible, and relevant framework in relation to the specific points raised in the stimulus material and the question frame. However, there were some recurring errors in its application. Limited responses tended to describe Kachru's model in simplistic terms, often misidentifying India's position as originally posited, or failing to accurately articulate its norm-developing role.

Clear to effective responses used Kachru's framework as a springboard to explore deeper postcolonial themes such as linguistic imperialism, language death – including progression to extinction according to UNESCO – and the dynamics of language revitalisation as seen, for example, in Wales or New Zealand. These more effective responses demonstrated a deeper grasp of linguistic theory and often integrated examples drawn from broader academic contexts.

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Encouragingly, effective and, at times, sophisticated responses developed discussion by referencing more contemporary theorists. Macaulay's notion of English as a colonial tool was seldom cited, while more developed responses incorporated the work of McArthur and Phillipson. These responses not only explored English as a global lingua franca but also engaged with its benefits and drawbacks, particularly in relation to cultural homogenisation and linguistic hybridity. Examples provided included Chinglish, Konglish and Japlish.

Some effective responses drew on Platt, Weber and Ho's work on World Englishes and discussed the concept of hybridisation in detail. Jennifer Jenkins was cited with some confidence, and several candidates used her work on English as a lingua franca to argue for a more inclusive and pluralistic understanding of global English, often contrasting this with older deficit models.

Section B

Question 2 – *Language and the self*

The stimulus material presented in **Question 2** was taken from a podcast called *Ideas*, broadcast by the Canadian broadcaster CBC Radio in 2021, titled *The ongoing search for the perfect climate change metaphor.*

Candidates were required to discuss what they felt were the most important issues raised in the text relating to the ways in which language can *shape and reflect the ways people think*. They were further required to refer to specific details from the text as well as to ideas and examples from their wider study of Language and the self.

Assessment Objective 1 – Understanding (10 marks)

Most responses selected at least some of the specific points raised in the stimulus material, including explanations of how the use of metaphors in material concerning climate change could be more meaningful than providing factual information because data may not always be understood or their use may lead to what is described as the *information deficit model*. The view that *Metaphors are central to how we talk and think about a lot of aspects of our world* was widely discussed, as was the feeling that it was crucial to select *the right metaphor to get people motivated*.

Limited responses relied on the examples of metaphors provided **–** *heat-trapping blanket, house on fire*, and *melting ice cream cone* to demonstrate a generalised understanding of the stimulus material. However, clear to effective responses discussed in detail the dangers of *relying on war metaphors* as some people's interpretations may assign glory, bravery and success to war instead of the intended interpretation of collective continuous striving with no end point to allay climate change.

Clear responses responded thoughtfully to Professor Kai Chan's contribution in which he proposed the metaphor of love as an alternative to fear- or crisis-based metaphors like war, although only insightful responses offered counterarguments to Chan's suggestion.

Assessment Objective 2 – Writing (5 marks)

In June 2025, many brief responses were seen in ***Section B***, possibly indicating that time management during the examination had been a problem. Candidates are reminded to ensure that their response time should be used equally between ***Section A*** and ***Section B*** in order to maximise the potential to gain marks.

As in previous examination sessions, some responses were limited by the inclusion of literary analysis of the stimulus material instead of linguistic discussion of the specific ideas which it presented. At times, responses offered analysis of the text originator's tone, use of imagery and narrative point of view and did not engage with ideas underpinning the question frame. Often these responses were overly long and lacking in precision and relevance.

However, those responses which were appropriately and relevantly sustained were generally crafted into a clear organisational structure with ideas flowing through a logical sequence of paragraphs. Introductions were generally succinct giving a clear overview of ideas which were to be discussed or a short precis of the stimulus material. However, conclusions tended only to repeat points already stated rather than end by reaffirming a strong linguistic point of view.

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Assessment Objective 4 – Conceptualisation (10 marks)

It was evident that while some candidates had surface knowledge of linguistic determinism or relativity, many lacked a clear understanding of these concepts. The result was superficial commentary, often unmoored from the actual text. References to Sapir and Whorf were sometimes made, but tended to rely on examples such as the Hopi tribe which did not meaningfully enhance the argument. Furthermore, most responses did not distinguish between the strong and weak hypotheses, which were critical to assessing how the text relates to linguistic relativity.

Effective responses showed a grasp of the weak hypothesis, linking it thoughtfully to the extract's discussion of the *information deficit model*. These responses argued that the shift from factual communication to metaphorical language reflects an understanding that people's perception of climate change is mediated by language – a key tenet of linguistic relativity. Some effective responses also applied a determinist viewpoint, arguing that the very need for metaphor suggests a deterministic assumption: namely, that if climate change is not framed in specific, emotionally resonant ways, people will struggle to conceptualise it or take action. This showed some sophisticated thinking, especially where responses evaluated how metaphors do more than communicate – they structure thought and behaviour.

Effective responses engaged confidently and accurately with George Lakoff's theory of conceptual metaphor. These responses demonstrated an assured understanding that metaphors are not merely decorative, but fundamental to thought, and that abstract concepts are understood through familiar, embodied experiences (for example *blanket, house on fire*, and *war*). Sophisticated discussion explicitly found echoes of Lakoff in Stephen Flusberg's idea: *Metaphors are, to use a metaphor, baked into language*.

The concept of love as proposed by Chan was often linked to Universalism, which led to discussions of how universal cognitive and emotional frameworks (sometimes citing Pinker but with little development) enable such metaphors to transcend language-specific differences. Clear responses drew attention to Chan's rhetorical question: *Everybody knows what that word means, right?* interpreting this as a tacit appeal to universal understanding, reinforcing the idea that the metaphor of love works precisely because it draws on a shared human emotional capacity, supporting a universalist position.

Some discussion of genderlect theories was provided in limited responses which stated that metaphors of war would be more meaningful to a male audience and metaphors of love could be more meaningful to a female audience. Even where Robin Lakoff, Cameron and Tannen were cited in some irrelevant detail, such wide-reaching generalisations were not plausible.

There were also many citations of the four maxims of conversation according to Grice. In most cases these references were implausible and usually not tied relevantly to specific points from the stimulus material or to the question frame.

In some very long responses, presentation of conceptualisation dominated the response throughout. Rather than carefully selecting and applying the most appropriate theoretical examples to points being made, at times there were successions of paragraphs which only discussed various linguistic models or approaches, making no mention of how or why they supported ideas from the text. Candidates are reminded that in Paper 41, focus on the stimulus material, the question frame and reference to conceptualisation should remain intertwined throughout a sustained but firmly-directed response in order to maximise marks being awarded.

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ENGLISH LANGUAGE

Paper 9093/42
Language Topics

Key messages

The overall title for 9093 Paper 42 is *Language topics*. The question paper is set into two sections, each containing one compulsory question. Each question carries 25 marks, with 50 marks being available for the question paper as a whole. For each question, there is a specific question frame, pertinent to the stimulus material and appropriately relevant to a particular aspect of the language topic.

The topics considered in Paper 42 are *English in the world* provided in the question paper in ***Section A***, as Question 1, and *Language and the self*, positioned as Question 2 in ***Section B***. Assessment Objectives 1 (Understanding – 10 marks), 2 (Writing – 5 marks) and 4 (Conceptualisation – 10 marks) apply to both questions.

General comments

The main requirement in Paper 42 is for candidates to provide sustained, discursive essays in response to the focus of the questions. As in previous examination sessions, at times there was evidence that analysis of the stimulus material had been undertaken, with responses containing commentary on the text originator's use of language. This was seen more in responses to **Question 2** rather than in those to **Question 1**. Such analysis is not required in Paper 42 and any response comprising such material ran the risk of becoming irrelevant.

In June 2025, despite the engaging nature of the stimulus material, some responses were rather brief, particularly in ***Section B***, meaning that ideas remained undeveloped. Moreover, particularly in responses to **Question 1**, there was a good deal of evidence of candidates wanting to present the entirety of their understanding of the broader language topic instead of selecting what they considered to be the most important points raised in the text. This led to loss of focus and a lack of development of any main, relevant points.

Nonetheless, some clear to effective work was seen at times, mainly in ***Section A***. Such responses retained focus on the ideas presented in the stimulus material and the specific frame of the question. More effective essays provided relevant support drawn from wider study of the language topics and demonstrated clarity and control of expression throughout.

Comments on specific questions

Section A

Question 1 – *English in the world*

The stimulus material for Question 1 was taken from an article published in the British newspaper The Guardian in 2022 titled *English is picking up brilliant new words from around the world – and that's a gift*.

Candidates were required to discuss what they felt were the most important issues raised in the text relating to *the causes and effects of the expansion of English around the world*. They were further required to refer to specific details from the text as well as to ideas and examples from their wider study of English in the world.

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Assessment Objective 1 – Understanding (10 marks)

The stimulus material presented a number of points which candidates could select for discussion. These included whether English could be viewed as a global language with examples of its predominance around the world, given that the text provided information that there are *1.75 billion global speakers*. Discussion was often developed with ideas of *ownership* of English and the extent to which it had become *shared* across the world.

Such ideas led naturally into explorations of English *in all its diversity* which had evolved due to borrowing, or indeed the *important reframing* of terminology from *loanwords* to *gifts* as defined by the text originator. Clear to effective responses brought forward arguments for, and relevant counterarguments to, the point that lexical gifts might be enriching English as it becomes more widely shared in response to the text's position that *Speakers of world varieties of English are remaking its vocabulary to better express their identities, cultures and everyday realities.*

Limited responses tended to focus solely on the examples of English borrowing from other languages for *lack of a direct English equivalent* provided in the stimulus material including the Portuguese *saudade*, the Dutch *gezellig* and *nomakanjani* from isiZulu. Clearer or more effective responses explored the text originator's notion that borrowing had been, and remains, part of the natural evolution of all living languages.

As in previous examination sessions, basic or limited responses referred to the stimulus material only minimally, choosing instead to present knowledge and understanding of their wider study of English in the world. Candidates are reminded that even where this knowledge and understanding of the language topic is demonstrated as extensive, focus on the stimulus material should underpin the question frame – in this case *the causes and effects of the expansion of English around the world* – and not the other way round.

Assessment Objective 2 – Writing (5 marks)

On the whole, those responses which were sustained were clearly organised into a logical sequence of paragraphs. This controlled approach demonstrated commendable writing skills including clear to effective introductions which provided a succinct precis of the text and gave a brief overview of the points which were to follow. On the other hand, limited introductions provided either a history of the emergence of the English language into its current form, or an extended overview of the language topic. Candidates are reminded that Assessment Objective 2 does not only cover aspects of writing such as spelling, punctuation and grammar: relevance of content and development of ideas are also assessed by applying that AO.

The most cohesive and coherent discussions followed a strong standpoint supported by a logical progression of ideas, well-integrated theoretical citation, and purposeful reference to the text. In contrast, weaker responses often meandered, lacking a stated line of argument or lapsing into general commentary.

Tone and register were generally maintained; clear discourse markers were usually seen to develop ideas or to introduce new points. Some loss of control was evident in responses which were overly long, indicating a move away from the original direction in the writing: extending a response into a continuation booklet does not necessarily mean that the essay has remained focused and relevant. On the contrary, it is more likely that the writing is not succinct, that the essay may have become repetitious or that some of the material presented is not relevant.

Assessment Objective 4 – Conceptualisation (10 marks)

In June 2025, a wide range of linguistic issues, concepts, models and approaches were referenced, usually relevantly and accurately, although somewhat briefly. Taking the fundamental standpoint from the stimulus material, the issue of colonial influence and concepts of linguistic borrowing, cultural homogenisation and linguistic hybridisation were frequently seen. English as a killer language and cultural imperialism were also frequently referenced, although not always attributed to Pakir and Phillipson respectively.

Basic or limited responses introduced the standpoints of descriptivism and prescriptivism in relation to the stimulus material, although these introductions did not go beyond generalised description. This was similar to the frequent but often inaccurate inclusion of quotes from Crystal which were not tied to any specific points.

Understandably, Kachru's model of concentric circles was generally cited, even in basic responses, and it offered a clear, accessible and relevant framework in relation to some specific points raised in the stimulus material and the question frame. Effective responses used Kachru's Three Circles Model not just descriptively but as a springboard to interrogate issues such as borrowing, nativisation, and anxieties over

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linguistic purity. From here, responses often branched into discussion of more contemporary or less well-known theories, including Tom McArthur's model of World English, Macaulay's notion of English as a colonial tool and Jennifer Jenkins' work on English as a lingua franca.

Some insightful discussion was seen in responses which explored the complex sociolinguistic outcomes of the global spread of English including code-mixing and the pathway to language death according to UNESCO. Effective responses analysed the phenomenon of hybrid languages such as Singlish to discuss the socio-political tensions between local identity and perceived linguistic legitimacy. A small number of responses incorporated relevant personal experiences from their own bilingual education or observations of English use in multicultural contexts, to add authenticity and insight to their argument.

Section B

Question 2 – *Language and the self*

The stimulus material presented in **Question 2** was taken from an article on the BBC website, published in 2021 titled *Africa's lost languages: How English can fuel an identity crisis*.

Candidates were required to discuss what they considered to be the most important issues raised in the text relating to the ways in which language can *shape and reflect personal and social identity*. They were further required to refer to specific details from the text as well as to ideas and examples from their wider study of Language and the self.

Assessment Objective 1 – Understanding (10 marks)

The stimulus material offered viewpoints gained from two lived experiences: the first, from Khahliso, offered insight from a regional language speaker who was bullied for her lack of proficiency in English; the second was from Amaka who described her identity crisis which had resulted, conversely, from her not knowing Igbo and who had taken steps to learn her native language as an older student. Basic or limited responses used the above examples to paraphrase the presented narratives without exploring the wider linguistic consequences of the details provided.

However, clear responses selected at least some of the specific points raised in the stimulus material, including how language can be used to discriminate, and therefore in regions around the world, English *can open and close doors*. These differentiated views were developed by the text originator with the notion that *Language gives you a sense of community*, although most responses provided more engagement using the idea that, in the past, children have been *forced to speak English*.

In terms of the language topic, *Language and the self*, clear or effective responses explored ways in which a speaker's *diction* can engender discrimination or how learning languages other than one's mother tongue can allow one to *see the world in a different light*.

Assessment Objective 2 – Writing (5 marks)

In June 2025, many brief responses were seen in Section B, possibly indicating that time management during the examination had been a problem. Candidates are reminded to ensure that their response time should be used equally between Sections A and Sections B in order to maximise the potential to gain marks.

Although a number of responses to **Question 2** were brief, there were also responses which were overly long and lacking in precision and relevance.

However, those responses which were appropriately and relevantly sustained were generally crafted into a clear organisational structure with ideas flowing through a logical sequence of paragraphs. Introductions were generally succinct giving a clear overview of ideas which were to be discussed or a short precis of the stimulus material. However, conclusions tended only to repeat points already stated rather than end by reaffirming a strong linguistic point of view.

Overall, tone and register were appropriately maintained and discourse markers allowed a degree of fluency through clear to effective responses. There was a tendency, however, to use rhetorical questions in the main body of some discussions, possibly in an attempt to provide journalistic flair. This approach to crafting academic writing is not advised because if there are questions to be posed, then they should be answered by the candidate.

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Assessment Objective 4 – Conceptualisation (10 marks)

In those responses which were sustained, a wide range of mostly relevant conceptual references was seen. These included those to Michael Pearce's work on language and social groups, as well as examples of accent studies such as those conducted by Gary Ives.

As expected, there were many citations of landmark sociolinguistic theories such as Giles' Communication Accommodation Theory, Labov's overt and covert prestige, Tajfel and Turner's social identity theory and Milroy and Milroy's social network theory. Effective responses referred to Fishman's theory of language and ethnicity as well as Butler's performativity in relation to the construction of social identity. There was also some insightful reference to Gumperz as a critical source on code switching, presenting it as a strategy for navigating the social and linguistic expectations of the various social groups to which an individual belonged.

Support for arguments with real-world illustrations such as the overt prestige associated with Received Pronunciation in the UK and the covert prestige enjoyed by African American Vernacular English in the US was plausible where it was relevantly tied to specific points made in the stimulus material. However, less plausible was reference to theories pertaining to English and its impact on the world as these would have been better placed in a response to Question 1. Conceptualisation which was misplaced included reference to Kachru's concentric circles model or concepts such as Phillipson's linguistic imperialism and Pakir's English as a killer language which refer to the pre-eminence of English and the resultant language death.

There were also many citations of the four maxims of conversation according to Grice. In most cases these references were implausible and usually not tied relevantly to specific points from the stimulus material or to the question frame. This was similar to inclusions of Bernstein's elaborated and restricted codes, the Sapir-Whorf hypothesis and Tannen's genderlect which were not made relevant to the discussion.

In some very long responses, presentation of conceptualisation dominated the response throughout. Rather than carefully selecting and applying the most appropriate theoretical examples to points being made, at times there were successions of paragraphs which only discussed various linguistic models or approaches, making no mention of how or why they supported ideas from the text. Candidates are reminded that in Paper 42, focus on the stimulus material, the question frame and reference to conceptualisation should remain intertwined throughout a sustained but firmly-directed response in order to maximise marks being awarded.

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ENGLISH LANGUAGE

Paper 9093/43
Language Topics

Key messages

The overall title for 9093 Paper 43 is Language topics. Thus, the question paper is set into two sections, each containing one compulsory question. Each question carries 25 marks, with 50 marks being available for the question paper as a whole. For each question, there is a specific question frame, pertinent to the stimulus material and appropriately relevant to a particular aspect of the language topic.

The topics considered in Paper 43 are *English in the world* provided in the question paper in ***Section A***, as Question 1, and *Language and the self*, positioned as **Question 2** in ***Section B***. Assessment Objectives 1 (Understanding **–** 10 marks), 2 (Writing **–** 5 marks) and 4 (Conceptualisation **–** 10 marks) apply to both questions.

General comments.

The main requirement in Paper 43 is for candidates to provide sustained, discursive essays in response to the focus of the question. As in previous examination sessions, at times there was evidence that analysis of the stimulus material had been undertaken, with responses containing commentary on the text originator's use of language. This was seen more in responses to **Question 2** rather than in those to **Question 1**. Such analysis is not required in Paper 43 and any response comprising such material ran the risk of becoming irrelevant.

In June 2025, despite the engaging nature of the stimulus material, some responses were rather brief, particularly in ***Section B***, meaning that ideas remained undeveloped. Moreover, particularly in responses to **Question 1**, there was a good deal of evidence of candidates wanting to present the entirety of their understanding of the broader language topic instead of selecting what they considered to be the most important points raised in the text. This led to loss of focus and a lack of development of any main, relevant points.

Nonetheless, some clear to effective work was seen at times, mainly in ***Section A***. Such responses retained focus on the ideas presented in the stimulus material and the specific frame of the question. More effective essays provided relevant support drawn from wider study and demonstrated clarity and control of expression throughout.

Comments on specific questions

Section A

Question 1 – *English in the world*

The stimulus material for **Question 1** was an extract from an article published on a business website in 2021 titled *Is English taking over the world? Or is the world taking over English?*

Candidates were required to discuss what they felt were the most important issues raised in the text relating to *the changing use of English in the world*. They were further required to refer to specific details from the text as well as to ideas and examples from their wider study of English in the world.

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Assessment Objective 1 – Understanding (10 marks)

The stimulus material presented a number of points which candidates could select for discussion. These included consideration of the potential of any impact experienced in the text originator's notion that English is becoming the language of international trade, the linguistic concept of borrowing including any *random collection of origins*, the reasons for transmission and absorption of loanwords into the English language including any colonial legacy, the author's conceptualisation of what they describe as *tentpole words*, changing international perceptions of the *coolness factor* of English, the concept of code switching and whether it may be deemed necessary for reasons of *pragmatism, efficiency and pronunciation*.

Most responses provided a selection of at least some of these points with a tendency to focus more on the well-known concept of borrowing rather than exploring the idea of tentpole words being used in a variety of regions *because they describe a thing that was not there before*. Only very few responses explored the questions posed by the text originator in the title of the text, *Is English taking over the world? Or is the world taking over English?*

Effective responses demonstrated a deeper reading of the stimulus material, discussing the validity of the text originator's final point that there may be instances when English, as used by some multilingual speakers, can sound *pretentious and inauthentic*.

Basic or limited responses referred to the texts only minimally, choosing instead to present knowledge and understanding of their wider study of English in the world or an historical account of the development of the English language over time. Candidates are reminded that even where this knowledge and understanding of the language topic is demonstrated as extensive, focus on the stimulus material should underpin the question frame – in this case *the changing use of English in the world* – and not the other way round.

Assessment Objective 2 – Writing (5 marks)

On the whole, responses were clearly organised into a logical sequence of paragraphs. This controlled approach demonstrated commendable writing skills including provision of clear to effective introductions which provided a succinct precis of the text and gave a brief overview of the points which were to follow.

On the other hand, limited introductions provided either a history of the emergence of the English language into its current form, or an extended overview of the topic, *English in the world.* Candidates are reminded that Assessment Objective 2 does not only cover aspects of writing such as spelling, punctuation and grammar: relevance of content and development of ideas are also assessed by applying that AO.

Tone and register were generally maintained; clear discourse markers were usually seen to develop ideas or to introduce new points. Some loss of control was evident in responses which were overly long, indicating a move away from the original direction in the writing: extending a response into a continuation booklet does not necessarily mean that the essay has remained focused and relevant. On the contrary, it is more likely that the writing is not succinct, that the essay may have become repetitious or that some of the material presented is not relevant.

Assessment Objective 4 – Conceptualisation (10 marks)

A wide range of linguistic issues, methods, concepts and approaches were referenced in response to **Question 1**, most of which were accurately cited although not all were attributed to their originator.

The most frequent citation used was of Kachru's Circles of English model with a generally accurate account of how Kachru had differentiated use of English in the inner, outer or expanding circles. Using the text originator's reference to Hindi, Japanese, German or Korean speakers, most responses referencing Kachru made accurate placements of these speakers' home nations according to the original model. Effective responses sought to discuss whether Kachru's differentiation may have changed and become outdated, in consideration of any changing use of English internationally.

Crystal and Diamond were also frequently referenced, although not always accurately, and with little relevance to the discussion in hand. At times, conceptualisation was generalised, especially in terms of English as a 'killer language', language death, and influences of colonialism. Some citations were somewhat out of place and would have been better positioned in a response to **Question 2** of Paper 43. These included references to the Sapir-Whorf Hypothesis, Giles' Communication Accommodation Theory and Bernstein's elaborated and restricted codes.

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Clear or effective conceptual references included detailed accounts of Schneider's dynamic model, McCrum's default position, Widdowson's spread and distribution, Modiano's circles and the channels described by Galloway and Rose and how these approaches might reflect the ways in which the use of English is changing. The most effective, or even insightful, responses took care to reference only those theoretical examples with direct relevance to the point being made rather than present a succession of names of theorists whose work was either outside the scope of the stimulus material or was only minimally appropriate to the discussion.

Section B

Question 2 – *Language and the self*

The stimulus material presented in **Question 2** was an extract from an article in the American magazine *The Atlantic*, published in 2021 and titled *Why We Speak More Weirdly at Home*.

Candidates were required to discuss what they felt were the most important issues raised in the text relating to the ways in which language can *shape and reflect social identity*. They were further required to refer to specific details from the text as well as to ideas and examples from their wider study of Language and the self.

Assessment Objective 1 – Understanding (10 marks)

The main thrust of the article was delivered in its subtitle: *When people share a space, their collective experience can sprout its own vocabulary, known as a familect*, thus a number of opportunities for discussion on the concept of language used within familial relationships was offered.

Specific points raised by the text originator included the ways in which, and reasons for, development of a *secret* language or, as described a *private lexicon*, how and why the *shared experience* of being part of a family unit can affect language and its users, the value of being able to extend one's familect to others resulting in the effect of *welcoming outsiders into one's clan,* the personal and social values of being able to express *our nonpublic selves in all their weird glory*, and how and why a sense of community might be developed in using a familect or other private language.

Most candidates engaged with the purposes of forming at least a private, if not secret, language and drew upon examples from their personal experience to enhance their response and demonstrate their understanding of the concept of familect.

Clear to effective responses explored how relationship dynamics, described in the article in terms of Mignon Fogarty's podcast might be enhanced and form a strong social identity for the family unit internally and possibly also externally. Limited responses, on the other hand, tended to take a narrative approach in recasting the humorous experience of Alex Roberts where *half a hog* had come to mean a small unit of measurement of liquid instead of making an in-depth exploration of Cynthia Gordon's final comment: *moment by moment, in everyday language use, we create our families*.

Assessment Objective 2 – Writing (5 marks)

Writing skills generally demonstrated structural control in that most responses were crafted into a logical sequence of paragraphs, headed by appropriate discourse markers. Some effective introductions provided a succinct overview of the main points which would be presented in the body of the essay. Limited introductions tended to define the difference between idiolect and sociolect without reference to the stimulus material, even though the familect concept was clearly a specific aspect of sociolect. Most discussions concluded with a generalised repetition of points already stated instead of reaffirming a strong linguistic point of view.

Tone and register were generally maintained throughout and content of responses was mostly relevant even in brief responses. This gave the impression that completing a sustained discursive response equal to that provided to **Question 1** had not been possible due to time constraints. Candidates are reminded to plan their examination time carefully, including giving themselves enough time for deep reading of the stimulus material.

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Assessment Objective 4 – Conceptualisation (10 marks)

Using knowledge and understanding gained from the June 2024 stimulus material for **Question 2** for Paper 43, responses plotted the concept of familect plausibly against examples of cryptolect, including that developed in prisons, Polari and Cockney Rhyming Slang. These two concepts sat well together as support for evidence selected from the stimulus material.

The setting of the family unit gave a natural opening for reference to the strong ties defined in Milroy's Social Network theory, the notion of In-groups according to Tajfel, and Giles' Communication Accommodation Theory. Effective responses were developed by introducing how language can be used to exclude as well as to include. These discussions cited Kramarae's Muted Groups or Eckert's Jocks and Burnouts to support points made in terms of how private sociolects may be perceived as secret and exclusionary to anyone outside the established social group.

At times, however, there was loss of focus on the question frame which asked specifically for discussion of *social identity*. In such cases, responses began to present irrelevant citations which were more suited to explorations of language and thought, with references being made to the Sapir-Whorf Hypothesis, Universalism, Innatism and Language of Thought. Candidates are reminded of the importance of maintaining focus on the question frame and the stimulus material and not to add in the names of theories and theorists just because they are known. Relevant conceptualisation should be tightly knitted into a response which is sustained and firmly directed in order to maximise its potential for marks being awarded.

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Cambridge International AS & A Level

ENGLISH LANGUAGE **9093/11**

Paper 1 Reading **May/June 2025**

2 hours 15 minutes

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You must answer on the enclosed answer booklet.

You will need: Answer booklet (enclosed)

INSTRUCTIONS

- Answer **all** questions.
- Follow the instructions on the front cover of the answer booklet. If you need additional answer paper, ask the invigilator for a continuation booklet.
- Dictionaries are **not** allowed.

INFORMATION

- The total mark for this paper is 50.
- The number of marks for each question or part question is shown in brackets [ ].

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Section A: Directed response

Question 1

Read the following text, which is taken from an information leaflet about beekeeping.

(a) You are a beekeeper who plans to visit a local school to give a speech to the school community about keeping bees. Write the opening of your speech. Use 150–200 words. [10]

(b) Compare your speech opening with the leaflet, analysing form, structure and language. [15]

10 ways to help the honey bee

Honey bees are responsible for pollinating one-third of all the foods we eat.

Content removed due to copyright restrictions.

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Why not invite a local beekeeper to visit and tell you more about the facts and folklore that surround this fascinating and ancient species?

Section B: Text analysis

Question 2

Read the following text, which is an extract from a non-fiction book about snow. The text explains an Icelandic word for snow.

Analyse the text, focusing on form, structure and language. [25]

Hundslappadrífa

Snowflakes as big as a dog's paw (Icelandic)

One of the first Icelandic tourists, P C Headley, wrote of riding across the island on horseback 'in a sort of grave exhilaration, gazing as in a dream at the hills, and drinking in the sunlight, content with silence and the present'. More and more people have been journeying to Iceland, hoping to find silence away from the modern world in the great snowfields and frozen tongues of glacial ice. Yet the glaciers are vanishing. The first to melt away was *Ok*, in 2019, and scientists fear that of 400-plus glaciers, none will remain by 2200. The barely perceptible crackle of frost in the air has been replaced by throbbing bass, and the howling wind by elfin, high-pitched vocals. Today Iceland is as well known for its music as the ice from which it takes its name. In the 1990s the enigmatic singer Björk exploded onto the indie music scene, introducing many English native speakers to the concept of diacritics[1] – and then came a riot of Icelandic indie and post-rock bands, of which Sigur Rós remains the headliner. While Björk tactically chose to sing in English, Sigur Rós achieved success even with British and American audiences who could not understand the words.

Over time, Sigur Rós lyrics became impossible for Icelanders to understand too – some of the band's songs aren't sung in Icelandic either. The lead singer Jónsi began to apply his eerie falsetto to a newly invented language: 'Hopelandic', or 'Vonlenska' in Icelandic. This is not so much a language (since it has no vocabulary or grammar), but rather 'a form of gibberish vocals' that fits to the music and acts as another instrument. Many singers do this while composing, when they've decided on the melody but haven't yet written the lyrics, but the exercise rarely makes it into the final score. Hopelandic appears on the Sigur Rós albums *Von*, *Ágœtis byrjun* and *Takk* …, and throughout the enigmatic album *()*. The name *()* is suggestive – is hope beyond words?

It was probably only a matter of time before the human voice melted away from Jónsi's productions altogether. In 2019 he created a haunting ambient album, *Lost and Found*, with Alex Somers, which the pair dropped on the world just before a North American tour. 'It falls somewhere between what was, what is, and what will be,' Somers said, cryptically. 'Sound friends that you may have heard or seen before appear; familiar, but different.' One track is named *Hundslappadrífa*, which translates as 'snow as big as a dog's paws'. These large snowflakes cluster together, and fall swiftly and softly from clouds in calm weather, softening the bleak landscape. Children are glad when 'hundslappadrífa' blankets the grey city streets as it is ideal for making snowballs. According to Icelandic meteorologist Trausti Jónsson, the term first appeared in print in a newspaper report in 1898. Iceland has a rich vocabulary for snow: the default is 'snjór' (snow), while 'mjöll' is snow that has just fallen; there are variations like 'skœðadrífa' (bright snow) and 'logndrífa' (calm snow). But 'hundslappadrífa' has a particular magic of its own.

The song *Hundslappadrífa* elides the experience of precipitation and listening: musical notes and flakes falling, chords gradually accreting in the listener's memory. In the end this delicate, otherworldly orchestra fades to a soft and dusty patter, which can only be a real

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field recording of snowfall. The microphone is held up into swirling flakes, documenting them as other artists have angled a camera lens down upon them – and then there is silence.

[1]*diacritics*: marks written above or below letters that change their original pronunciation

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ENGLISH LANGUAGE **9093/11**

Paper 1 Reading **May/June 2025**

MARK SCHEME

Maximum Mark: 50

Published

This mark scheme is published as an aid to teachers and candidates, to indicate the requirements of the examination. It shows the basis on which Examiners were instructed to award marks. It does not indicate the details of the discussions that took place at an Examiners' meeting before marking began, which would have considered the acceptability of alternative answers.

Mark schemes should be read in conjunction with the question paper and the Principal Examiner Report for Teachers.

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Generic Marking Principles

These general marking principles must be applied by all examiners when marking candidate answers. They should be applied alongside the specific content of the mark scheme or generic level descriptions for a question. Each question paper and mark scheme will also comply with these marking principles.

GENERIC MARKING PRINCIPLE 1:

Marks must be awarded in line with:

- the specific content of the mark scheme or the generic level descriptors for the question
- the specific skills defined in the mark scheme or in the generic level descriptors for the question
- the standard of response required by a candidate as exemplified by the standardisation scripts.

GENERIC MARKING PRINCIPLE 2:

Marks awarded are always **whole marks** (not half marks, or other fractions).

GENERIC MARKING PRINCIPLE 3:

Marks must be awarded **positively**:

- marks are awarded for correct/valid answers, as defined in the mark scheme. However, credit is given for valid answers which go beyond the scope of the syllabus and mark scheme, referring to your Team Leader as appropriate
- marks are awarded when candidates clearly demonstrate what they know and can do
- marks are not deducted for errors
- marks are not deducted for omissions
- answers should only be judged on the quality of spelling, punctuation and grammar when these features are specifically assessed by the question as indicated by the mark scheme. The meaning, however, should be unambiguous.

GENERIC MARKING PRINCIPLE 4:

Rules must be applied consistently, e.g. in situations where candidates have not followed instructions or in the application of generic level descriptors.

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GENERIC MARKING PRINCIPLE 5: Marks should be awarded using the full range of marks defined in the mark scheme for the question (however; the use of the full mark range may be limited according to the quality of the candidate responses seen).
GENERIC MARKING PRINCIPLE 6: Marks awarded are based solely on the requirements as defined in the mark scheme. Marks should not be awarded with grade thresholds or grade descriptors in mind.

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English & Media subject specific general marking principles
(To be read in conjunction with the Generic Marking Principles (and requiring further guidance on how to place marks within levels))

Components using level descriptors:

- We use level descriptors as a guide to broad understanding of the qualities normally expected of, or typical of, work in a level.
- Level descriptors are a means of general guidance and should not be interpreted as hurdle statements.
- Where indicative content notes are supplied for a question, these are *not* a prescription of required content, and must not be treated as such. Alternative correct points and unexpected answers in candidates' scripts must be given marks that fairly reflect the knowledge and skills demonstrated.
- While we may have legitimate expectations as to the ground most answers may occupy, we must at all times be prepared to meet candidates on their chosen ground, provided it is relevant ground (e.g. clearly related to and derived from a relevant passage/text and meeting the mark scheme requirements for the question).

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Annotations guidance for centres

Examiners use a system of annotations as a shorthand for communicating their marking decisions to one another. Examiners are trained during the standardisation process on how and when to use annotations. The purpose of annotations is to inform the standardisation and monitoring processes and guide the supervising examiners when they are checking the work of examiners within their team. The meaning of annotations and how they are used is specific to each component and is understood by all examiners who mark the component.

We publish annotations in our mark schemes to help centres understand the annotations they may see on copies of scripts. Note that there may not be a direct correlation between the number of annotations on a script and the mark awarded. Similarly, the use of an annotation may not be an indication of the quality of the response.

The annotations listed below were available to examiners marking this component in this series.

Annotations

Annotation	Meaning
	Assessment Objective 1
	Assessment Objective 2
	Assessment Objective 3
	Good point
	Error (analysis)
	SPAG error
	Unclear expression / errors throughout
	Good language
	Lifted material
	Purpose

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Annotation	Meaning
Q	Addressing the question
Q ?	Uncertain relevance to the question
R	Repetition
TE	Tense error

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English Language specific marking instructions:

AO1 Read and demonstrate understanding of a wide variety of texts. (Understanding)

- Marks should be awarded for the accuracy of the candidate's understanding of the text and its features, **not** for any analysis of them which is recognised under AO3.
- Where comparison is required, marks should be awarded for the candidate's recognition of similarities and differences between the texts and their features, **not** for any consequent analysis.
- When awarding a 'best-fit' mark within a Level for each AO, consider each bullet point equally.

AO2 Write effectively, creatively, accurately and appropriately, for a range of audiences and purposes. (Writing)

- Marks should be awarded equally on the basis of the level of the candidate's written expression (range of features used and accuracy) and the development of their writing (its organisation and relevance to task and audience).
- When awarding a 'best-fit' mark within a Level for each AO, consider each bullet point equally.

AO3: Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style. (Analysis)

- Marks should be awarded equally on the basis of the level of the candidate's analysis of the text's elements (form, structure and language) and of the writer's stylistic choices (including how style relates to audience and shapes meaning).
- When awarding a 'best-fit' mark within a Level for each AO, consider each bullet point equally.

In response to **Question 1(a)**, candidates are required to write between 150 and 200 words. While there is no direct penalty for failing to adhere to this requirement, examiners should consider this an aspect of the response's 'relevance to purpose'. As such, adherence to the word limit is assessed as part of the second bullet point of AO2.

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Section A: Directed response

Question	Answer	Marks
1(a)	**Read the following text, which is taken from an information leaflet about beekeeping.** **You are a beekeeper who plans to visit a local school to give a speech to the school community about keeping bees. Write the opening of your speech. Use 150–200 words.** Mark according to the levels of response marking criteria in Table A. **Additional guidance:** The comments below are illustrative and are not intended to be exhaustive. Candidates may make other valid comments that should be credited. **Responses might feature the following:** • Form, audience, purpose, style, conventions, language and structure will be appropriately adapted to suit task • Content may include key factual information as well as other relevant ideas • Tone will be used to have an impact on the reader and to create an effect	**10**

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Question	Answer	Marks
1(b)	**Compare your speech opening with the leaflet, analysing form, structure and language.** Mark according to the levels of response marking criteria in Table B. **Additional guidance:** The comments below are illustrative and are not intended to be exhaustive. Candidates may make other valid comments that should be credited. Candidates may organise their response in any appropriate way. They are not required to focus on form, structure and language in separate sections. **Responses might compare and analyse the following:** **Form** • The typical text conventions used in the leaflet and the candidate's speech opening • The ways in which the different purposes affect the content and style of the two texts • The ways in which the leaflet and the speech opening appeal to their respective intended audiences • Any other relevant aspect of the texts' form **Structure** • Relatively consistent paragraph length and the effect of this on the reader • The way the text develops the idea that honeybees are important and worth helping • The way the text builds its argument and credibility with examples and easy to follow actions • Discourse markers and other cohesive devices including subheadings • Any other relevant structural feature in the text	**15**

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Question	Answer	Marks
1(b)	**Language** • The use of direct address to engage and encourage the reader • The use of imperatives in the subheadings to give a clear plan of action to follow: *Make a honeybee-friendly habitat* • The use of lists to emphasise how much can be done to help: *asters and sunflowers, hollyhocks, larkspur and foxgloves* which are all readily available • The positive language used: *an excellent source of pollen, there is scope for more bee-friendly planting, this amazing insect, crops of fruit and veg will look and taste better, and your flowers will be abuzz all summer long* • Repetition of the words *honey bee* to emphasise the subject • The use of factual information: *pollinating one-third of all the foods we eat, Swarming is a natural process, on earth for some 30 million years* • The reference to the benefits of supporting the scheme: *You will receive, Your adoption money will help, simple things you can do to help save our honey bees* • The use of rhetorical questions and exclamation marks to enliven the text	

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Marking criteria for Section A Question 1 (a)

Table A

Level	AO1: Read and demonstrate understanding of a wide variety of texts. **5 marks**	AO2: Write effectively, creatively, accurately and appropriately, for a range of audiences and purposes. **5 marks**
5	• Sophisticated understanding of text (meaning/context/audience) • Insightful reference to characteristic features 5 marks	• Sophisticated expression, with a high level of accuracy • Content is fully relevant to audience and purpose; ideas are developed throughout in a sophisticated manner 5 marks
4	• Detailed understanding of text (meaning/context/audience) • Effective reference to characteristic features 4 marks	• Effective expression, with a few minor errors which do not impede communication • Content is relevant to audience and purpose; ideas are developed in an effective manner 4 marks
3	• Clear understanding of text (meaning/context/audience) • Clear reference to characteristic features 3 marks	• Clear expression, with occasional errors which do not impede communication • Content is relevant to audience and purpose; ideas are developed clearly 3 marks
2	• Limited understanding of text (meaning/context/audience) • Limited reference to characteristic features 2 marks	• Expression is clear but may not flow easily, with frequent errors which generally do not impede communication • Content is mostly relevant to audience and purpose; ideas are developed in a limited manner 2 marks
1	• Basic understanding of text (meaning/context/audience) • Minimal reference to characteristic features 1 mark	• Basic expression, with frequent errors which impede communication • Content may lack relevance to audience and purpose; minimal development of ideas 1 mark

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0	• No creditable response 0 marks	• No creditable response 0 marks

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Marking criteria for Section A Question 1 (b)

Table B

Level	AO1: Read and demonstrate understanding of a wide variety of texts. **5 marks**	AO3: Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style. **10 marks**
5	• Sophisticated comparative understanding of texts (meaning/context/audience) • Insightful reference to characteristic features 5 marks	• Sophisticated comparative analysis of elements of form, structure and language • Sophisticated analysis of how the writers' stylistic choices relate to audience and shape meaning 9–10 marks
4	• Detailed comparative understanding of texts (meaning/context/audience) • Effective reference to characteristic features 4 marks	• Detailed comparative analysis of elements of form, structure and language • Detailed analysis of how the writers' stylistic choices relate to audience and shape meaning 7–8 marks
3	• Clear comparative understanding of texts (meaning/context/audience) • Clear reference to characteristic features 3 marks	• Clear comparative analysis of elements of form, structure and/or language • Clear analysis of how the writers' stylistic choices relate to audience and shape meaning 5–6 marks
2	• Limited understanding of texts (meaning/context/audience), with limited comparison • Limited reference to characteristic features 2 marks	• Limited analysis of form, structure and/or language, with limited comparison • Limited analysis of how the writers' stylistic choices relate to audience and shape meaning 3–4 marks

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Level	AO1: Read and demonstrate understanding of a wide variety of texts. **5 marks**	AO3: Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style. **10 marks**
1	• Basic understanding of texts (meaning/context/audience), with minimal comparison • Minimal reference to characteristic features 1 mark	• Minimal analysis of form, structure and/or language, with minimal comparison • Minimal analysis of how the writers' stylistic choices relate to audience and shape meaning 1–2 marks
0	• No creditable response 0 marks	• No creditable response 0 marks

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Section B: Text analysis

Question	Answer	Marks
2	**Read the following text, which is an extract from a non-fiction book about snow. The text explains an Icelandic word for snow.** **Analyse the text, focusing on form, structure and language.** Mark according to the levels of response marking criteria in Table C. **Additional guidance:** The analysis should address the style, form, genre, structure and language of the text (including specific and relevant references), explaining how they create meaning in relation to audience and purpose. The comments below are illustrative and are not intended to be exhaustive. Candidates may make other valid comments that should be credited. Candidates may organise their response in any appropriate way. They are not required to focus on form, structure and language in separate sections. **Responses might analyse the following:** **Form** • The typical text conventions used in the extract • The ways in which the purpose affects the content and style of the text • The ways in which the extract appeals to its intended audience, e.g. through the tone and register used in the text • any other relevant aspect of the text's form **Structure** • The ways in which paragraphs are constructed and sequenced in the text • The ways in which ideas are developed • Varying paragraph length and how this enables the writer to develop certain points in depth/detail, or make high impact points for dramatic effect • The use of discourse markers for organisation/cohesion • The use of a range of cohesive devices – tense agreement, anaphoric/cataphoric refences, substitution, etc. • any other relevant structural feature in the text	**25**

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Question	Answer	Marks
2	**Language** • The inclusion of facts such as the first reference to *hundslappadrífa* in 1898, names of albums, reference to one of the first Icelandic tourists, *P C Headley* • Use of third person narrative for objectivity • Use of a lexical field related to sound and music: *diacritics, lyrics, instrument, percussion, triangle, tambourine, notes, chords, orchestra* • The names of singers to lend credibility: *Björk, Sigur Rós, Alex Somers, Jónsi* and quotations from them • The use of/reference to different languages used including *Icelandic, Hopelandic and gibberish* and the many words for different kinds of snow in Icelandic: *snjór*, *mjöll*, *skoeðdadrífa, logndrífa* • The beauty of the language used to describe the snow: *fall swiftly and softly from clouds in calm weather, softening the bleak landscape* • The use of onomatopoeia and the way that the place, sounds and language are all in harmony together: *crackle of frost*, *patter* • The use of personification: *frozen tongues* • any other relevant language feature used in the text.	

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Marking criteria for Section B Question 2

Table C

Level	AO1: Read and demonstrate understanding of a wide variety of texts. **5 marks**	AO3: Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style. **20 marks**
5	• Sophisticated understanding of text (meaning/context/audience) • Insightful reference to characteristic features 5 marks	• Analysis is sophisticated, coherent and very effectively structured • Insightful selection of elements of form, structure and language for analysis • Sophisticated awareness of writer's stylistic choices, including how style relates to audience and shapes meaning • Uses precise and fully appropriate language to link evidence with explanatory comments 17–20 marks
4	• Detailed understanding of text (meaning/context/audience) • Effective reference to characteristic features 4 marks	• Analysis is detailed, coherent and effectively structured • Effective selection of elements of form, structure and language for analysis • Detailed awareness of writer's stylistic choices, including how style relates to audience and shapes meaning • Uses effective and appropriate language to link evidence with explanatory comments 13–16 marks
3	• Clear understanding of text (meaning/context/audience) • Clear reference to characteristic features 3 marks	• Analysis is clear, coherent and well structured • Appropriate selection of elements of form, structure and language for analysis • Clear awareness of writer's stylistic choices, including how style relates to audience and shapes meaning • Uses clear and appropriate language to link evidence with explanatory comments 9–12 marks
2	• Limited understanding of text (meaning/context/audience) • Limited reference to characteristic features 2 marks	• Limited analysis, with some structure and limited coherence • Some appropriate selection of elements of form, structure and/or language for analysis • Limited awareness of writer's stylistic choices • Attempts to use appropriate language to link evidence with explanatory comments 5–8 marks

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Level	AO1: Read and demonstrate understanding of a wide variety of texts. 5 marks	AO3: Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style. 20 marks
1	• Basic understanding of text (meaning/context/audience) • Minimal reference to characteristic features 1 mark	• Basic analysis, with minimal structure or coherence • Minimal selection of elements of form, structure and language for analysis • Minimal awareness of writer's stylistic choices • Minimal use of appropriate language to link evidence with explanatory comments 1–4 marks
0	• No creditable response 0 marks	• No creditable response 0 marks

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Cambridge Assessment International Education

Cambridge International AS & A Level

ENGLISH LANGUAGE **9093/04**

Paper 4 Language Topics **For examination from 2021**

MARK SCHEME

Maximum Mark: 50

Specimen

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Generic Marking Principles

These general marking principles must be applied by all examiners when marking candidate answers. They should be applied alongside the specific content of the mark scheme or generic level descriptors for a question. Each question paper and mark scheme will also comply with these marking principles.

GENERIC MARKING PRINCIPLE 1:

Marks must be awarded in line with:

- the specific content of the mark scheme or the generic level descriptors for the question
- the specific skills defined in the mark scheme or in the generic level descriptors for the question
- the standard of response required by a candidate as exemplified by the standardisation scripts.

GENERIC MARKING PRINCIPLE 2:

Marks awarded are always **whole marks** (not half marks, or other fractions).

GENERIC MARKING PRINCIPLE 3:

Marks must be awarded **positively**:

- marks are awarded for correct/valid answers, as defined in the mark scheme. However, credit is given for valid answers which go beyond the scope of the syllabus and mark scheme, referring to your Team Leader as appropriate
- marks are awarded when candidates clearly demonstrate what they know and can do
- marks are not deducted for errors
- marks are not deducted for omissions
- answers should only be judged on the quality of spelling, punctuation and grammar when these features are specifically assessed by the question as indicated by the mark scheme. The meaning, however, should be unambiguous.

GENERIC MARKING PRINCIPLE 4:

Rules must be applied consistently e.g. in situations where candidates have not followed instructions or in the application of generic level descriptors.

GENERIC MARKING PRINCIPLE 5:

Marks should be awarded using the full range of marks defined in the mark scheme for the question (however; the use of the full mark range may be limited according to the quality of the candidate responses seen).

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GENERIC MARKING PRINCIPLE 6:

Marks awarded are based solely on the requirements as defined in the mark scheme. Marks should not be awarded with grade thresholds or grade descriptors in mind.

English Language specific marking instructions:

AO1: Read and demonstrate understanding of a wide variety of texts. (Understanding)

- Marks should be awarded for the accuracy of the candidate's understanding of the text and its features, **not** for any analysis of them which is recognised under AO3.
- Where comparison is required, marks should be awarded for the candidate's recognition of similarities and differences between the texts and their features, **not** for any consequent analysis.
- When awarding a 'best-fit' mark within a Level for each AO, consider each bullet point equally.

AO2: Write effectively, creatively, accurately and appropriately, for a range of audiences and purposes. (Writing)

- Marks should be awarded equally on the basis of the level of the candidate's written expression (range of features used and accuracy) and the development of their writing (its organisation and relevance to task and audience).
- When awarding a 'best-fit' mark within a Level for each AO, consider each bullet point equally.

AO4: Demonstrate understanding of linguistic issues, concepts, methods and approaches. (Conceptualisation)

- Marks should be awarded equally on the basis of the level of the candidate's understanding of the relevant issues, concepts, methods and approaches represented both in the text(s) and in their wider studies.
- When awarding a 'best-fit' mark within a Level for each AO, consider each bullet point equally.

Marking criteria for Section A Question 1 and Section B Question 2

Table A

Level	AO1: Read and demonstrate understanding of a wide variety of texts. **10 marks**	AO2: Write effectively, creatively, accurately and appropriately, for a range of audiences and purposes. **5 marks**	AO4: Demonstrate understanding of linguistic issues, concepts, methods and approaches. **10 marks**
5	• Sophisticated understanding of text (meaning/context/audience) • Insightful reference to specific points 9–10 marks	• Sophisticated expression, with a high level of accuracy • Content is fully relevant; ideas are developed throughout in a sophisticated manner 5 marks	• Sophisticated understanding of linguistic issues, concepts, methods and approaches represented in the text • Insightful reference to wider study of linguistic issues, concepts, methods and approaches 9–10 marks
4	• Detailed understanding of text (meaning/context/audience) • Effective reference to specific points 7–8 marks	• Effective expression, with a few minor errors which do not impede communication • Content is relevant; ideas are developed in an effective manner 4 marks	• Detailed understanding of linguistic issues, concepts, methods and approaches represented in the text • Effective reference to wider study of linguistic issues, concepts, methods and approaches 7–8 marks
3	• Clear understanding of text (meaning/ context/audience) • Clear reference to specific points 5–6 marks	• Clear expression, with occasional errors which do not impede communication • Content is relevant; ideas are developed clearly 3 marks	• Clear understanding of linguistic issues, concepts, methods and approaches represented in the text • Clear reference to wider study of linguistic issues, concepts, methods and approaches 5–6 marks
2	• Limited understanding of text (meaning/ context/audience) • Limited reference to specific points 3–4 marks	• Expression is clear but may not flow easily, with frequent errors which generally do not impede communication • Content is mostly relevant; ideas are developed in a limited manner 2 marks	• Limited understanding of linguistic issues, concepts, methods and/or approaches represented in the text • Some limited reference to wider study of linguistic issues, concepts, methods and/or approaches 3–4 marks

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Level	AO1: Read and demonstrate understanding of a wide variety of texts. **10 marks**	AO2: Write effectively, creatively, accurately and appropriately, for a range of audiences and purposes. **5 marks**	AO4: Demonstrate understanding of linguistic issues, concepts, methods and approaches. **10 marks**
1	• Basic understanding of text (meaning/ context/audience) • Minimal reference to specific points 1–2 marks	• Basic expression, with frequent errors which impede communication • Content may lack relevance in parts; minimal development of ideas 1 mark	• Basic understanding of linguistic issues, concepts, methods and/or approaches represented in the text • Minimal reference to wider study of linguistic issues, concepts, methods and/or approaches 1–2 marks
0	• No creditable response 0 marks	• No creditable response 0 marks	• No creditable response 0 marks

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Section A: English in the world

Question	Answer	Marks
1	**Read the following two texts. Text A is a news item published in 2014 on the *BBC World News Asia* website. Text B consists of four online comments written in response to this news item.** **Discuss what you feel are the most important issues raised in the texts relating to the spread of English around the world. You should refer to specific details from the texts as well as to ideas and examples from your wider study of English in the world.** Mark according to the levels of response marking criteria in Table A. **Additional guidance:** The comments below are illustrative and are not intended to be exhaustive. Candidates may make other valid comments that should be credited. **Responses might discuss the following:** • the concepts of a world language, English as a 'global' language, and English as a lingua franca • the spread and/or distribution of English, e.g. Kachru's concentric circles model • ideas of linguistic/cultural imperialism • the domination of world media and commerce by the English language • the effects of language contact • prescriptivist versus descriptivist attitudes to language change • language shift • the phenomenon of zero translation, e.g. *GDP*, *WTO*, *Wifi* • how and why some brand names are translated, e.g. *Nokia*, while some others are not, e.g. *iPhone* • lexical borrowing, e.g. *cul-de-sac*, *karaoke*, *jodhpurs*.	**25**

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Section B: Language and the self

Question	Answer	Marks
2	**Read the following text, which is an extract from a blog on the website of SOAS, a college of the University of London. It was posted in 2017.** **Discuss what you feel are the most important issues raised in the text relating to the ways in which language can shape and reflect social identity. You should refer to specific details from the text as well as to ideas and examples from your wider study of Language and the self.** Mark according to the levels of response marking criteria in Table A. **Additional guidance:** The comments below are illustrative and are not intended to be exhaustive. Candidates may make other valid comments that should be credited. **Responses might discuss the following:** • the notion of how identity is constructed by language • the fact that language is constantly evolving • the idea of RP being *under attack* • MLE as a sociolect which is very dynamic and changes constantly and rapidly • how MLE *occurred naturally due to an inner-city generation's exposure to a variety of accents, foreign languages, and pronunciations* • the idea that common culture rather than ethnic or social background is what matters in becoming part of the MLE language community • concepts related to the idea of language as an expression of self and identity • concepts related to the idea of shared culture-specific values (covert prestige) • the use of loanwords in MLE and other variants of English • specific instances of the lexis, grammar, syntax or phonology of MLE, e.g. the suffix *-dem*, the term *dutty* • concepts of convergence/divergence, e.g. Giles's Accommodation Theory; Sperber and Wilson's Relevance Theory • the idea that MLE is becoming *redundant* and less relevant as it spreads and UBE is suggested as a more appropriate term for the sociolect • the idea of code-switching from Standard English to MLE.	**25**

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Cambridge Assessment International Education

Cambridge International AS & A Level

ENGLISH LANGUAGE **9093/04**

Paper 4 Language Topics **For examination from 2021**

SPECIMEN PAPER **2 hours 15 minutes**

0123456789

You must answer on the enclosed answer booklet.

You will need: Answer booklet (enclosed)

INSTRUCTIONS

- Answer **all** questions.
- Follow the instructions on the front cover of the answer booklet. If you need additional answer paper, ask the invigilator for a continuation booklet.
- Dictionaries are **not** allowed.

INFORMATION

- The total mark for this paper is 50.
- The number of marks for each question or part question is shown in brackets [ ].

This document has **6** pages. Blank pages are indicated.

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Section A: English in the world

Question 1

Read the following two texts. Text A is a news item published in 2014 on the *BBC World News Asia* website. Text B consists of four online comments written in response to this news item.

Discuss what you feel are the most important issues raised in the texts relating to the spread of English around the world. You should refer to specific details from the texts as well as to ideas and examples from your wider study of English in the world. [25]

Text A

Why some English words are controversial in China

Nowadays, if you eavesdrop on Chinese people's phone conversations, it is commonplace to hear English phrases popping up here and there, like 'Okay', 'Cool' and 'Bye bye'.

In today's Chinese publications, English abbreviations and acronyms also pop up frequently without any Chinese translations: GDP, WTO, Wifi, CEO, MBA, VIP and the air pollutant term PM2.5 are among the most popular.

This phenomenon, termed 'zero translation', has sparked a fierce debate, with the Chinese Communist Party's official newspaper *People's Daily* the latest to join the fray.

'Why is zero translation so prevalent?' screams the headline in a recent commentary piece. 'Why do we have translations for Nokia and Motorola, but not for iPhone or iPad?' ask the authors.

What irritates them is the fact that these foreign terms are found not only in newspapers and online, but in serious science journals as well.

They claim that such practices damage the integrity and harmony of the Chinese language, dilute the richness of Chinese culture and hamper comprehension. 'How many people can understand these words?' they ask.

Text B

fedup123
1 May 2014 22:10

All languages will I believe merge. English will absorb ever more useful words and so will living languages elsewhere, until they resemble each other more and more.

If China wants to preserve as much of its language and culture as possible, it needs to export it.

noonehere624
1 May 2014 22:14

In what way does including words and terms from another language 'dilute the richness of Chinese culture'?

Doesn't it do the opposite? Or have I misunderstood the word richness?

Where would English be without all its borrowings from other languages?

I would suggest that it would be a lot less rich, and a lot less interesting.

laughalots96
1 May 2014 22:19

This 'purity of the language' debate goes on all over the world and the government in China or elsewhere is doomed to failure. People will say whatever they want to, however they like. They use the expressions they find useful and ignore the rest. Power to the people actually works when it comes to languages, thank goodness.

happy81
1 May 2014: 22:41

One of the reasons English is such a rich language is that it absorbs words from around the world like a sponge. I live in a cul-de-sac with a petite wife who likes to sing karaoke while wearing an azure dress and wearing cologne fragrance. She never uses rouge on her cheeks when she takes our kids to the kindergarten. Then she goes riding in her jodhpurs.

Section B: Language and the self

Question 2

Read the following text, which is an extract from a blog on the website of SOAS, a college of the University of London. It was posted in 2017.

Discuss what you feel are the most important issues raised in the text relating to the ways in which language can shape and reflect social identity. You should refer to specific details from the text as well as to ideas and examples from your wider study of Language and the self. [25]

The rise of Multicultural London English, innit?

Received Pronunciation is under attack. An early threat to the standard accent of English as spoken in the south of England dates back to the 1980s in the form of Estuary English. A more recent – and perhaps more potent – assault comes in the form of Multicultural London English (MLE).

MLE is a sociolect of English, in as much as it is a dialect specific to a particular social class. It is predominantly spoken by young, working class people in the multicultural neighbourhoods of inner-city London and its suburbs.

In a newspaper article, Dr Chris Lucas, Senior Lecturer at SOAS University of London, describes the spread of MLE beyond the capital: 'London accents have spread beyond London and are spreading still. You're seeing more and more features of this Multicultural London English being adopted and blended with the local, traditional, working-class accents of whichever city it might be – Manchester, Liverpool, Birmingham.'

The power of cool

The term 'cool' to signify something that is fashionable and stylish may be thought to have its origins in the Jazz Age of the 1930s; however, the term was being used at least a century beforehand to similarly signify something that was desirable.

The spread of MLE beyond London can be seen as a triumph of the 'cool', with language taken from Grime, Street and Hip-Hop music, and from a gang culture characterised in films such as AdULTHOOD and KiDULTHOOD, becoming fashionable in youth culture.

However, the rise of MLE in London has not been so much as a result of the influence of popular culture, but has occurred naturally due to an inner-city generation's exposure to a variety of accents, foreign languages, and pronunciations, which have shaped its everyday spoken language.

Loanwords

The use of MLE words which derive from other languages is significant. For example, the suffix *-dem* as a plural marker in words such as *mandem* or *gyaldem*, or the term *dutty* to mean something that is either dirty, bad, or ugly, both come from Jamaican Creole. The concept of loanwords is nothing new in language: the English language would be nothing like as rich without the loanwords it has acquired from its neighbours, far and wide.

Urban British English (UBE)

Language is ever evolving. Even during the relatively short time it has taken for MLE to become established, spread and now studied, it is also becoming redundant. As MLE gains popularity beyond its original catchment area of London and the Home Counties, so its relevance is diminished.

So RIP MLE; and hello UBE.

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Cambridge Assessment International Education

Syllabus

Cambridge International AS & A Level English Language 9093

Use this syllabus for exams in 2024, 2025 and 2026.
Exams are available in the June and November series.
Also available for examination in March 2024, 2025 and 2026 for India only.



Version 2

For the purposes of screen readers, any mention in this document of Cambridge IGCSE refers to Cambridge International General Certification of Secondary Education.

Cambridge Pathway

Why choose Cambridge International?

Cambridge International prepares school students for life, helping them develop an informed curiosity and a lasting passion for learning. We are part of the University of Cambridge.

Our Cambridge Pathway gives students a clear path for educational success from age 5 to 19. Schools can shape the curriculum around how they want students to learn – with a wide range of subjects and flexible ways to offer them. It helps students discover new abilities and a wider world, and gives them the skills they need for life, so they can achieve at school, university and work.

Our programmes and qualifications set the global standard for international education. They are created by subject experts, rooted in academic rigour and reflect the latest educational research. They provide a strong platform for students to progress from one stage to the next, and are well supported by teaching and learning resources.

We review all our syllabuses regularly, so they reflect the latest research evidence and professional teaching practice – and take account of the different national contexts in which they are taught.

We consult with teachers to help us design each syllabus around the needs of their learners. Consulting with leading universities has helped us make sure our syllabuses encourage students to master the key concepts in the subject and develop the skills necessary for success in higher education.

Our mission is to provide educational benefit through provision of international programmes and qualifications for school education and to be the world leader in this field. Together with schools, we develop Cambridge learners who are confident, responsible, reflective, innovative and engaged – equipped for success in the modern world.

Every year, nearly a million Cambridge students from 10 000 schools in 160 countries prepare for their future with the Cambridge Pathway.

School feedback: 'We think the Cambridge curriculum is superb preparation for university.'

Feedback from: Christoph Guttentag, Dean of Undergraduate Admissions, Duke University, USA

Quality management

Cambridge International is committed to providing exceptional quality. In line with this commitment, our quality management system for the provision of international qualifications and education programmes for students aged 5 to 19 is independently certified as meeting the internationally recognised standard, ISO 9001:2015. Learn more at **www.cambridgeinternational.org/ISO9001**

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Important: Changes to this syllabus

For information about changes to this syllabus for 2024, 2025 and 2026, go to page 31.

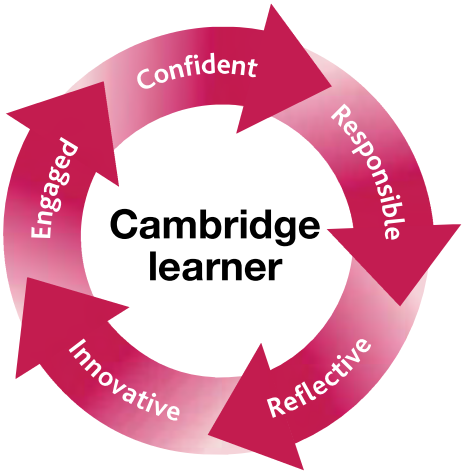
The latest syllabus is version 2, published October 2021.

Any textbooks endorsed to support the syllabus for examination from 2021 are still suitable for use with this syllabus.

1 Why choose this syllabus?

Key benefits

The best motivation for a student is a real passion for the subject they're learning. By offering students a variety of Cambridge International AS & A Levels, you can give them the greatest chance of finding the path of education they most want to follow. With over 50 subjects to choose from, students can select the ones they love and that they're best at, which helps motivate them throughout their studies.



Following a Cambridge International AS & A Level programme helps students develop abilities which universities value highly, including:

- a deep understanding of their subjects
- higher order thinking skills – analysis, critical thinking, problem solving
- presenting ordered and coherent arguments
- independent learning and research.

Cambridge International AS & A Level English Language develops a set of transferable skills. These include critical analysis; constructing arguments; presenting knowledge and understanding; and writing English in a balanced, articulate and fluent manner. Learners can apply these skills across a wide range of subjects and real-world situations. These skills will also equip them well for progression to higher education or directly into employment.

Our approach in Cambridge International AS & A Level English Language encourages learners to be:

confident, exploring texts and ideas with self-assurance, intellectual freedom and personal insight

responsible, committing to their learning and developing linguistic expertise to better understand themselves, others and the wider community

reflective, developing a keen and critical sense of themselves as users and consumers of language in a range of ever-changing contexts

innovative, approaching tasks and texts with a combination of creative, original and flexible thinking

engaged, recognising and interrogating the role language plays in matters of personal, social and global significance, and being prepared to apply this learning beyond the classroom

School feedback: 'Cambridge students develop a deep understanding of subjects and independent thinking skills.'

Feedback from: Principal, Rockledge High School, USA

Key concepts

Key concepts are essential ideas that help students develop a deep understanding of their subject and make links between different aspects. Key concepts may open up new ways of thinking about, understanding or interpreting the important things to be learned.

Good teaching and learning will incorporate and reinforce a subject's key concepts to help students gain:

- a greater depth as well as breadth of subject knowledge
- confidence, especially in applying knowledge and skills in new situations
- the vocabulary to discuss their subject conceptually and show how different aspects link together
- a level of mastery of their subject to help them enter higher education.

The key concepts identified below, carefully introduced and developed, will help to underpin the course you will teach. You may identify additional key concepts which will also enrich teaching and learning.

The key concepts for Cambridge International AS & A Level English Language are:

- **Text and context**
  A **text** can be defined as a single, coherent unit of language, from the briefest spoken utterance to a book published across several volumes. However, no text exists without **context**; students of English language must always consider how a text's meaning is informed by the circumstances not only of its production, but also of its communication and reception.
- **Meaning and style**
  The study of English language involves developing a range of strategies for exploring the complex ways in which different linguistic elements come together to create **meaning**. Whether producing their own texts or analysing texts produced by others, students of English language must consider how choices regarding form, structure and language also interact to create a distinctive **style**.
- **Audience**
  Students of English language must learn to identify and analyse the strategies writers and speakers use to communicate with their intended **audience(s)**. Likewise, they must be able to predict, recognise and analyse the various responses these strategies might elicit.
- **Creativity**
  Whether writing artfully for a specified purpose and audience, reading deeply between the lines of a challenging text, or developing strategies for acquiring the language in the first place, users of the English language must demonstrate **creativity** in a range of forms and contexts.
- **Diversity**
  Constantly subject to a range of influences – whether personal, social, geographical or otherwise – the English language exists in a range of competing and overlapping forms at any given moment. This extraordinary **diversity** offers a rich opportunity for analysis, comparison and exploration.
- **Change**
  The phonological, morphological, semantic, syntactic and other aspects of the English language are liable to **change** over time. Students of English language must analyse these changes and explore in detail the factors that drive them.

International recognition and acceptance

Our expertise in curriculum, teaching and learning, and assessment is the basis for the recognition of our programmes and qualifications around the world. Every year thousands of students with Cambridge International AS & A Levels gain places at leading universities worldwide. Our programmes and qualifications are valued by top universities around the world including those in the UK, US (including Ivy League universities), Europe, Australia, Canada and New Zealand.

UK NARIC, the national agency in the UK for the recognition and comparison of international qualifications and skills, has carried out an independent benchmarking study of Cambridge International AS & A Level and found it to be comparable to the standard of AS & A Level in the UK. This means students can be confident that their Cambridge International AS & A Level qualifications are accepted as equivalent, grade for grade, to UK AS & A Levels by leading universities worldwide.

Cambridge International AS Level English Language makes up the first half of the Cambridge International A Level course in English Language and provides a foundation for the study of English Language at Cambridge International A Level. Depending on local university entrance requirements, students may be able to use it to progress directly to university courses in English Language or some other subjects. It is also suitable as part of a course of general education.

Cambridge International A Level English Language provides a foundation for the study of English or related courses in higher education. Equally it is suitable as part of a course of general education.

For more information about the relationship between the Cambridge International AS Level and Cambridge International A Level see the 'Assessment overview' section of the Syllabus overview.

We recommend learners check the Cambridge recognition database and university websites to find the most up-to-date entry requirements for courses they wish to study.

Learn more at **www.cambridgeinternational.org/recognition**

School feedback: 'The depth of knowledge displayed by the best A Level students makes them prime targets for America's Ivy League universities.'

Feedback from: Yale University, USA

Supporting teachers

We provide a wide range of resources, detailed guidance and innovative training and professional development so that you can give your students the best possible preparation for Cambridge International AS & A Level. To find out which resources are available for each syllabus go to **www.cambridgeinternational.org/support**

The School Support Hub is our secure online site for Cambridge teachers where you can find the resources you need to deliver our programmes. You can also keep up to date with your subject and the global Cambridge community through our online discussion forums.

Find out more at **www.cambridgeinternational.org/support**

Support for Cambridge International AS & A Level			
Planning and preparation • Next steps guides. • Schemes of work. • Specimen papers. • Syllabuses. • Teacher guides.	**Teaching and assessment** • Endorsed resources. • Online forums. • Support for coursework and speaking tests.	**Learning and revision** • Example candidate responses. • Past papers and mark schemes. • Specimen paper answers.	**Results** • Candidate Results Service. • Principal examiner reports for teachers. • Results Analysis.

Sign up for email notifications about changes to syllabuses, including new and revised products and services at **www.cambridgeinternational.org/syllabusupdates**

Professional development

We support teachers through:

- Introductory Training – face-to-face or online
- Extension Training – face-to-face or online
- Enrichment Professional Development – face-to-face or online

Find out more at **www.cambridgeinternational.org/events**

- Cambridge Professional Development Qualifications

Find out more at **www.cambridgeinternational.org/profdev**

Supporting exams officers

We provide comprehensive support and guidance for all Cambridge exams officers.
Find out more at: **www.cambridgeinternational.org/eoguide**

2 Syllabus overview

Aims

The aims describe the purposes of a course based on this syllabus.

The aims are to enable students to:

- enjoy the experience of studying English language
- develop a critical and informed response to texts in a range of forms, styles and contexts, produced for a variety of audiences
- communicate effectively, creatively, accurately and appropriately in their writing
- develop the interdependent skills of reading, analysis and research
- develop an appreciation of concepts and techniques in the study of English language
- build a firm foundation for further study of language and linguistics.



Cambridge Assessment International Education is an education organisation and politically neutral. The contents of this syllabus, examination papers and associated materials do not endorse any political view. We endeavour to treat all aspects of the exam process neutrally.

Content overview

Cambridge International AS Level English Language provides learners with opportunities to make critical and informed responses to a wide range of texts. Learners will also demonstrate their ability to produce writing to specific briefs and for given audiences.

Cambridge International A Level English Language learners will also develop a strong foundation in the study of linguistics, focusing on language change, child language acquisition, English in the world, and language and the self.

Learners who follow the Cambridge International AS & A Level English Language syllabus will develop the following skills and understanding:

- sustaining accurate, fluent and consistent writing
- producing informed responses appropriate to the specified form, style, context, and audiences
- conveying knowledge and understanding from both specific examples and wider studies.

These are highly transferable skills and may help learners in other subject areas, as well as equipping them for higher education or employment.



Support for Cambridge International AS & A Level English Language

Our School Support Hub **www.cambridgeinternational.org/support** provides Cambridge schools with a secure site for downloading specimen and past question papers, mark schemes, grade thresholds and other curriculum resources specific to this syllabus. The School Support Hub community offers teachers the opportunity to connect with each other and to ask questions related to the syllabus.

School feedback: 'Cambridge International AS & A Levels prepare students well for university because they've learnt to go into a subject in considerable depth. There's that ability to really understand the depth and richness and the detail of a subject. It's a wonderful preparation for what they are going to face at university.'

Feedback from: US Higher Education Advisory Council

Assessment overview

Paper 1

Reading 2 hours 15 minutes

50 marks

Candidates answer **two** compulsory questions: Question 1 in Section A, and Question 2 in Section B.

Externally assessed

50% of the AS Level

25% of the A Level

Paper 2

Writing 2 hours

50 marks

Candidates answer **two** questions: one compulsory question from Section A, and one question from a choice of three in Section B.

Externally assessed

50% of the AS Level

25% of the A Level

Paper 3

Language Analysis 2 hours 15 minutes

50 marks

Candidates answer **two** compulsory questions: Question 1 in Section A, and Question 2 in Section B.

Externally assessed

25% of the A Level

Paper 4

Language Topics 2 hours 15 minutes

50 marks

Candidates answer **two** compulsory questions each on a separate topic area: Question 1 in Section A, and Question 2 in Section B.

Externally assessed

25% of the A Level

Information on availability is in the **Before you start** section.

There are three routes for Cambridge International AS & A Level English Language:

	Route	Paper 1	Paper 2	Paper 3	Paper 4
1	**AS Level only** (Candidates take all AS components in the same exam series)	yes	yes	no	no
2	**A Level** (staged over two years) Year 1 AS Level*	yes	yes	no	no
	Year 2 Complete the A Level	no	no	yes	yes
3	**A Level** (Candidates take all components in the same exam series)	yes	yes	yes	yes

* Candidates carry forward their AS Level result subject to the rules and time limits described in the *Cambridge Handbook*.

Candidates following an AS Level route will be eligible for grades a–e. Candidates following an A Level route are eligible for grades A*–E.

Assessment objectives

The assessment objectives (AOs) are:

AO1

Read and demonstrate understanding of a wide variety of texts.

AO2

Write effectively, creatively, accurately and appropriately, for a range of audiences and purposes.

AO3

Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style.

AO4

Demonstrate understanding of linguistic issues, concepts, methods and approaches.

AO5

Analyse and synthesise language data from a variety of sources.

Weighting for assessment objectives

The approximate weightings allocated to each of the assessment objectives (AOs) are summarised below.

Assessment objectives as a percentage of each qualification

Assessment objective	Weighting in AS Level %	Weighting in A Level %
AO1	15	20
AO2	45	30
AO3	40	20
AO4	0	20
AO5	0	10
Total	100	100

Assessment objectives as a percentage of each component

Assessment objective	Weighting in components %			
	Paper 1	Paper 2	Paper 3	Paper 4
AO1	30	0	10	40
AO2	10	80	10	20
AO3	60	20	0	0
AO4	0	0	40	40
AO5	0	0	40	0
Total	100	100	100	100

3 Subject content

AS Level content (Paper 1 and Paper 2)

In Paper 1, candidates are primarily assessed on skills and techniques related to reading.

In Paper 2, candidates are primarily assessed on skills and techniques related to writing.

The examples listed in the content below are suggested rather than prescribed ways in which candidates can demonstrate knowledge and understanding. These examples are not exhaustive.

Paper 1 Reading

Learners are encouraged to read widely throughout their programme of study, continually deepening their appreciation of an increasingly rich array of reading material. They should develop an intimate knowledge and understanding of the conventions and discourses associated with a diverse range of genres, styles and contexts. Furthermore, learners should continue to cultivate their personal relationship with reading, enabling them to respond reflectively, analytically, discursively and creatively, as is appropriate to the task or context.

Knowledge and understanding	
Candidates should be prepared to demonstrate knowledge and understanding of:	Examples:
• the conventions of a wide range of written textual forms	• advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing
• the linguistic elements and literary features of texts	• parts of speech / word classes, vocabulary, figurative language, phonology, morphology, rhetorical devices, voice, aspect, tense, modality, narrative perspective, word ordering and sentence structure, paragraph- and text-level structure, formality/informality of tone, pragmatics
• the significance of audience in both the design and reception of texts	
• the ways in which genre, purpose and context contribute to the meaning of texts	

Skills and techniques

Candidates should be prepared to demonstrate the following skills and techniques:

- reading a range of unseen texts
- analysing the ways in which linguistic elements come together in a text to create meaning
- recognising different nonfiction textual forms and their conventions
- writing analytically about the effects produced by a range of linguistic elements and literary features
- integrating individual analytical points into broader overall responses to texts
- selecting and interpreting words and phrases from a text with care and precision
- recognising and commenting on the overall style of a text, and exemplifying this through specific instances of language analysis
- using quotations and evidence, with judgement, to produce precise, meaningful commentaries
- using appropriate language to link quotations and evidence with explanatory comments
- integrating quotations and evidence into a cohesive argument
- writing short, directed pieces in response to a text
- writing in the same style as another text
- writing in a different style from a text at the same time as re-using the content/material
- comparing the style and linguistic elements of their own writing with those of a given text.

Paper 2 Writing

Using their reading as inspiration, learners should explore and experiment with a similarly extensive variety of genres, styles and contexts in their writing. In addition to refining their ability to express themselves with precision and clarity of purpose, learners should become increasingly reflective writers, capable of adapting the style of their writing to fit a diverse range of forms, audiences, purposes and contexts.

The knowledge and understanding that candidates are required to demonstrate in Paper 2 is the same as is covered in Paper 1.

Knowledge and understanding

Candidates should be prepared to demonstrate knowledge and understanding of:	Examples:
• the conventions of a wide range of written textual forms	• advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing
• the linguistic elements and literary features of texts	• parts of speech / word classes, vocabulary, figurative language, phonology, morphology, rhetorical devices, voice, aspect, tense, modality, narrative perspective, word ordering and sentence structure, paragraph- and text-level structure, formality/informality of tone, pragmatics

Knowledge and understanding continued	
Candidates should be prepared to demonstrate knowledge and understanding of:	
• the significance of audience in both the design and reception of texts	
• the ways in which genre, purpose and context contribute to the meaning of texts	

Skills and techniques	
Candidates should be prepared to demonstrate the following skills and techniques:	Examples:
• writing for a specified audience and purpose, to fulfil the brief provided	
• producing an appropriate structure for longer pieces of writing	• Freytag's Pyramid in imaginative writing; dialectical structure in discursive writing; introductory, summary and evaluative sections in review writing
• organising writing to achieve specific effects	• withholding key information in imaginative writing; juxtaposing counterarguments in discursive writing; evidentiary logic in critical writing
• structuring paragraphs	• topic sentences, connectives, internal coherence, discourse markers
• using a range of appropriate linguistic elements and literary features	• imagery in descriptive writing; rhetorical devices in argumentative writing; evaluative lexis in critical writing
• expressing ideas accurately and clearly at both sentence and word level	
• reflecting upon and evaluating the qualities of their own writing, including aspects relating to its purpose, form and audience	

A Level content (Paper 3 and Paper 4)

At A Level, candidates are required to build upon the knowledge and understanding established at AS Level, and to concentrate their study on four specialised subject areas:

- language change
- child language acquisition
- English in the world
- language and the self.

Similarly, the skills and techniques required at A Level expand upon those required at AS Level: Paper 3 primarily focuses on skills and techniques related to analytical reading, while the emphasis in Paper 4 is on discursive writing.

The examples listed in the content below are suggested rather than prescribed ways in which candidates can demonstrate knowledge and understanding. These examples are not exhaustive.

Paper 3 Language Analysis

Learners should familiarise themselves with a comprehensive set of tools, strategies and conventions for studying language. This should include the following: developing frameworks for analysing and comparing unseen texts; assimilating a range of appropriate technical terminology; assessing, evaluating and synthesising sources of evidence; carrying out independent research into language concepts; contextualising their views in relation to theories; and understanding language data presented in the form of transcripts, tables and graphs.

Section A: Language change

In Section A, learners will explore how English has continually adapted to reflect changes in the social, cultural, political and technological contexts in which it has been used. Learners will explore the causes and consequences of language change in English, developing their knowledge of the topic through research, analysis, and an understanding of conventional methods of presenting historical language data.

Knowledge and understanding	
Candidates should be prepared to demonstrate knowledge and understanding of:	Examples:
• the chronology and essential features of the development of the English language from Early Modern English to Contemporary English	• graphology, orthography, phonology, morphology, syntax, lexis, semantics, pragmatics, grammar
• concepts and terminology related to language change	• etymology, derivation, inflection, telescoping, coalescence, acronym, conversion, compounding, backformation, blending, borrowing, amelioration, pejoration, broadening, narrowing
• theories and theorists of language change	• random fluctuation theory, cultural transmission theory, theory of lexical gaps, substratum theory, functional theory, tree and wave models
• *n*-gram graphs representing changes in language use over time	• comparisons of related words, parts of speech, inflections, collocations
• word tables derived from corpus data	• collocate lists, synonym lists

Skills and techniques

Candidates should be prepared to demonstrate the following skills and techniques:

- researching in the field of language change
- analysing unseen texts as exemplars of certain aspects of language change
- interpreting and analysing *n*-gram graphs and corpus data relating to language change
- contextualising findings alongside relevant theories and concepts relating to language change
- synthesising their responses to a range of language data into a coherent analytical essay.

Section B: Child language acquisition

In Section B, learners will explore the stages of early development (0–8 years) in child language acquisition, considering the various features and functions of spoken language use during this period, and familiarising themselves with a range of relevant theories, theorists and conventions within the field.

Knowledge and understanding

Candidates should be prepared to demonstrate knowledge and understanding of:	Examples:
• the main stages of early development in child language acquisition	• babbling, holophrastic, telegraphic and post-telegraphic stages
• the different functions of children's language	• instrumental, regulatory, interactional, personal, representational, heuristic, imaginative
• theories and theorists of child language acquisition	• imitation and reinforcement theory, language acquisition device, language acquisition support system, cognitive development theory, child-directed or caretaker speech
• the conventions and features of unscripted conversation and spoken language transcripts	• notation for pauses, overlaps, stress, intonation and phonemic features

Skills and techniques

Candidates should be prepared to demonstrate the following skills and techniques:

- researching in the field of child language acquisition
- analysing spoken language transcripts as exemplars of certain aspects of child language acquisition
- interpreting and analysing instances of conversation involving children aged 0 to 8 years
- contextualising findings alongside relevant theories and concepts relating to child language acquisition
- synthesising these theoretical considerations into a coherent analytical essay.

Paper 4 Language Topics

Throughout the syllabus, learners are encouraged to move beyond the practical application of English language, and to engage in a deeper consideration of a number of theoretical issues related to its use. Learners should develop their ability to engage in discussion on how the diverse forms of English that exist across the world interact both with one another and with other languages, and, how language use contributes to the construction and development of the self.

For Paper 4, learners will study two key topics in the field of English language studies: 'English in the world' in Section A and 'Language and the self' in Section B.

Section A: English in the world

In Section A, learners will explore the history of English as a 'global' language; the development of standard and nonstandard forms of English, including the varieties used by first-language users outside the UK; and ethical considerations related to the continuing expansion of English usage around the world.

Knowledge and understanding	
Candidates should be prepared to demonstrate knowledge and understanding of theories, theorists and studies relating to:	Examples:
• the historical development of English as a 'global' language	• colonialism, cultural influence and effects, concentric circles model, multilingualism, the future of English
• varieties of English	• standard and nonstandard 'Englishes', creolisation, sociolect continuum, official and unofficial attitudes and policies
• relevant ethical considerations	• language shift and death, cultural imperialism, equality of opportunity, global cooperation

Skills and techniques

Candidates should be prepared to demonstrate the following skills and techniques:

- reading and demonstrating critical understanding of unseen texts relating to 'English in the world'
- selecting and analysing pertinent ideas and examples from the texts
- relating these ideas and examples to theories, theorists and studies from their wider research in the relevant topic area
- synthesising these considerations into a coherent analytical essay.

Section B: Language and the self

In Section B, learners will explore how language allows us to communicate our sense of self to others, as well as playing a highly significant role in the ongoing construction, determination and development of that self. Learners will study the degree to which language is innate, learned, or both; the ways in which language and thought are both interwoven with, and separable from, each other; and how we use language, both consciously and unconsciously, to construct and maintain social identities.

Knowledge and understanding	
Candidates should be prepared to demonstrate knowledge and understanding of theories, theorists and studies relating to:	Examples:
• innateness and learning	• behaviourism, innatism, nativism, empiricism
• the relationship between language and thought	• linguistic relativity and determinism, universalism, language of thought hypothesis
• the relationship between language and social identity	• speech communities, prestige, idiolect, dialect, sociolect, genderlect, variation, standard and nonstandard features, inclusion and exclusion, speech sounds and accents

Skills and techniques

Candidates should be prepared to demonstrate the following skills and techniques:

- reading and demonstrating critical understanding of unseen texts relating to 'Language and the self'
- selecting and analysing pertinent ideas and examples from the texts
- relating these ideas and examples to theories, theorists and studies from their wider research in the relevant topic area
- synthesising these considerations into a coherent analytical essay.

Support for Cambridge International AS & A Level English Language

New support for teachers includes a Teacher guide, Learner guide and a Glossary of terms. Other support is available from our School Support Hub at **www.cambridgeinternational.org/support**

4 Details of the assessment

Paper 1 Reading

Written paper, 2 hours 15 minutes, 50 marks

This paper has two sections, Section A: Directed response, and Section B: Text analysis. Each section is worth 25 marks.

Candidates must answer **two** compulsory questions: Question 1 in Section A, and Question 2 in Section B.

Each question requires candidates to respond to one unseen text.

Examples of the text types candidates may be required to read (or produce for Question 1(a)) include advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.

Dictionaries may **not** be used.

Section A: Directed response

Question 1 is in two parts:

(a) directed writing task in response to a text (10 marks)
(b) comparison of the form, structure and language of the candidate's response in part (a) with that of the original text (15 marks)

In Question 1(a), candidates are required to read a text of approximately 550–750 words, and write a directed response of 150–200 words, choosing their vocabulary, style and structure to fit a specific form, purpose and audience.

This question assesses AO1 and AO2.

In Question 1(b), candidates are required to:

- identify, analyse and compare characteristic features of the texts
- relate these features to the purpose, audience and context of the texts.

This question assesses AO1 and AO3.

Section B: Text analysis

In Question 2, candidates are required to read a text of approximately 550–750 words, and comment on the form, structure and language of the text.

Candidates are required to:

- identify characteristic features of the text, relate them to the meaning, context and audience of the writing, and organise information in their answers
- comment on aspects of form, structure and language
- write in an appropriate style.

This question assesses AO1 and AO3.

Paper 2 Writing

Written paper, 2 hours, 50 marks

This paper has two sections, Section A: Shorter writing and reflective commentary, and Section B: Extended writing. Each section is worth 25 marks.

Candidates must answer **two** questions: Question 1 in Section A (compulsory), and **one** question in Section B.

Dictionaries may **not** be used.

Section A: Shorter writing and reflective commentary

Question 1 is in two parts:

(a) writing a short text in response to a prompt (15 marks)

(b) writing a reflective commentary based on how the text produced in part (a) fulfils the brief (10 marks)

In Question 1(a), candidates are required to write a response of no more than 400 words to a prompt, choosing their vocabulary, style and structure to fit a specific form, purpose and audience.

Examples of the text types candidates may be required to produce include advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.

This question assesses AO2.

In Question 1(b), candidates are required to write a reflective commentary explaining how their linguistics choices have contributed to fulfilling the brief in part (a).

Candidates are required to focus on their choices of form, structure and language, and to analyse how these stylistic choices relate to audience and shape meaning.

This question assesses AO3.

Section B: Extended writing

Candidates choose to answer **one** out of three questions.

Each question corresponds to one of the three following categories:

- imaginative/descriptive
- discursive/argumentative
- review/critical.

Depending on the category, examples of the text types candidates may be required to produce include advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.

In each question, candidates are required to:

- produce a continuous piece of writing of 600–900 words
- express their ideas clearly, coherently and accurately, using an appropriate range of language
- develop their writing in a manner appropriate to the form, purpose and audience.

This question assesses AO2.

Paper 3 Language Analysis

Written paper, 2 hours 15 minutes, 50 marks

This paper has two sections, Section A: Language change, and Section B: Child language acquisition. Each section is worth 25 marks.

Candidates must answer **both** questions.

Dictionaries may **not** be used.

Section A: Language change

In Question 1, candidates are required to respond to three texts:

- a prose text of approximately 300–400 words, written at any time from the Early Modern English period (beginning c.1500) to the present day
- two sources of quantitative language data: an *n*-gram graph and a word table of corpus data.

Examples of the prose text types candidates may be required to analyse include advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto) biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.

Candidates are required to analyse how the prose text exemplifies ways in which the English language has changed over time. They are required to support their response with reference to the two sources of quantitative language data provided, and also to their wider study of language change.

This question assesses AO2, AO4 and AO5.

Section B: Child language acquisition

In Question 2, candidates are required to respond to a transcript featuring language spoken by a child or children between the ages of 0 and 8, possibly alongside other speakers.

Candidates are required to analyse ways in which the speakers in the transcript use language, referring to specific details from the transcription, and relating their observations to ideas and examples from their wider study of child language acquisition.

This question assesses AO1, AO4 and AO5.

Paper 4 Language Topics

Written paper, 2 hours 15 minutes, 50 marks

This paper has two sections, Section A: English in the world, and Section B: Language and the self. Each section is worth 25 marks.

Candidates must answer **both** questions.

Dictionaries may **not** be used.

Section A: English in the world

In Question 1, candidates are required to respond to approximately 400–500 words of text on the topic of 'English in the world'.

In their essay, candidates are required to discuss the most important issues the text raises in relation to a specified aspect of the role and status of the English language in the world. They are required to refer to specific details from the text, relating points in their discussion to ideas and examples from their wider study of the topic of English in the world.

This question assesses AO1, AO2 and AO4.

Section B: Language and the self

In Question 2, candidates are required to respond to approximately 400–500 words of text on the topic of 'Language and the self'.

In their essay, candidates are required to discuss the most important issues the text raises in relation to a specified aspect of the relationship between language and the self. They are required to refer to specific details from the text, relating points in their discussion to ideas and examples from their wider study of the topic of language and the self.

This question assesses AO1, AO2 and AO4.

Command words

Command words and their meanings help candidates know what is expected from them in the exam. The table below includes command words used in the assessment for this syllabus. The use of the command word will relate to the subject context.

Command word	What it means
Analyse	examine in detail to show meaning, identify elements and the relationship between them
Compare	identify/comment on similarities and/or differences
Discuss	write about issue(s) or topic(s) in depth in a structured way

5 Additional information

Reference table of International Phonetic Alphabet (IPA) phonemic symbols (Received Pronunciation)

1 Consonants of English	
/ f /	fat, rough
/ v /	very, village, love
/ θ /	theatre, thank, athlete
/ ð /	this, them, with, either
/ s /	sing, thinks, losses
/ z /	zoo, beds, easy
/ ʃ /	sugar, bush
/ ʒ /	pleasure, beige
/ h /	high, hit, behind
/ p /	pit, top
/ t /	tip, pot, steep
/ k /	keep, tick, scare
/ b /	bad, rub
/ d /	bad, dim
/ g /	gun, big
/ tʃ /	church, lunch
/ dʒ /	judge, gin, jury
/ m /	mad, jam, small
/ n /	man, no, snow
/ ŋ /	singer, long
/ l /	loud, kill, play
/ j /	you, beyond
/ w /	one, when, sweet
/ r /	rim, bread
/ ʔ /	uh-oh

2 Pure vowels of English	
/ iː /	beat, keep
/ ɪ /	bit, tip, busy
/ e /	bet, many
/ æ /	bat
/ ʌ /	cup, son, blood
/ aː /	car, heart, calm, aunt
/ ɒ /	pot, want
/ ɔː/	port, saw, talk
/ ə /	about, sudden
/ ɜː /	word, bird
/ ʊ /	book, wood, put
/ uː /	food, soup, rude

3 Diphthongs of English	
/ eɪ /	late, day, great
/ aɪ /	time, high, die
/ ɔɪ /	boy, noise
/ aʊ /	cow, house, town
/ əʊ /	boat, home, know
/ ɪə /	ear, here
/ eə /	air, care, chair
/ ʊə /	cure, jury

Transcription key

(1)	=	pause in seconds
(.)	=	micropause
underlined	=	stressed sound/syllable(s)
//	=	speech overlap
[*italics*]	=	paralinguistic features
<*italics*>	=	contextual information
UPPER CASE	=	words spoken with increased volume
°word°	=	words spoken with decreased volume
↗	=	upward intonation
↘	=	downward intonation
/wiv/	=	phonemic representation of speech sounds

6 What else you need to know

This section is an overview of other information you need to know about this syllabus. It will help to share the administrative information with your exams officer so they know when you will need their support. Find more information about our administrative processes at **www.cambridgeinternational.org/eoguide**

Before you start

Previous study

We recommend that learners starting this course should have completed a course in English equivalent to Cambridge IGCSE™ or Cambridge O Level.

Guided learning hours

We design Cambridge International AS & A Level syllabuses based on learners having about 180 guided learning hours for each Cambridge International AS Level and about 360 guided learning hours for a Cambridge International A Level. The number of hours a learner needs to achieve the qualification may vary according to local practice and their previous experience of the subject.

Availability and timetables

You can enter candidates in the June and November exam series. If your school is in India, you can enter your candidates in the March exam series. You can view the timetable for your administrative zone at **www.cambridgeinternational.org/timetables**

Private candidates can enter for this syllabus.

Combining with other syllabuses

Candidates can take this syllabus alongside other Cambridge International syllabuses in a single exam series. The only exceptions are:

- Cambridge International AS Level Language and Literature in English (8695)
- syllabuses with the same title at the same level.

Group awards: Cambridge AICE

Cambridge AICE (Advanced International Certificate of Education) is a group award for Cambridge International AS & A Level. It allows schools to offer a broad and balanced curriculum by recognising the achievements of learners who pass exams in a range of different subjects.

Learn more about Cambridge AICE at **www.cambridgeinternational.org/aice**

Making entries

Exams officers are responsible for submitting entries to Cambridge International. We encourage them to work closely with you to make sure they enter the right number of candidates for the right combination of syllabus components. Entry option codes and instructions for submitting entries are in the *Cambridge Guide to Making Entries*. Your exams officer has a copy of this guide.

Exam administration

To keep our exams secure, we produce question papers for different areas of the world, known as administrative zones. We allocate all Cambridge schools to one administrative zone determined by their location. Each zone has a specific timetable. Some of our syllabuses offer candidates different assessment options. An entry option code is used to identify the components the candidate will take relevant to the administrative zone and the available assessment options.

Support for exams officers

We know how important exams officers are to the successful running of exams. We provide them with the support they need to make your entries on time. Your exams officer will find this support, and guidance for all other phases of the Cambridge Exams Cycle, at **www.cambridgeinternational.org/eoguide**

Retakes and carry forward

Candidates can retake Cambridge International AS Level and Cambridge International A Level as many times as they want to. Cambridge International AS & A Levels are linear qualifications so candidates cannot re-sit individual components. Information on retake entries is in the *Cambridge Handbook* at **www.cambridgeinternational.org/examsofficers**

Candidates can carry forward the result of their Cambridge International AS Level assessment from one series to complete the Cambridge International A Level in a following series, subject to the rules and time limits described in the *Cambridge Handbook*.

Language

This syllabus and the related assessment materials are available in English only.

Accessibility and equality

Syllabus and assessment design

Cambridge International works to avoid direct or indirect discrimination in our syllabuses and assessment materials. We aim to maximise inclusivity for candidates of all national, cultural or social backgrounds and with other protected characteristics. In addition, the language and layout used are designed to make our materials as accessible as possible. This gives all learners the opportunity, as fairly as possible, to demonstrate their knowledge, skills and understanding and helps to minimise the requirement to make reasonable adjustments during the assessment process.

Access arrangements

Access arrangements (including modified papers) are the principal way in which Cambridge International complies with our duty, as guided by the UK Equality Act (2010), to make 'reasonable adjustments' for candidates with special educational needs (SEN), disability, illness or injury. Where a candidate would otherwise be at a substantial disadvantage in comparison to a candidate with no SEN, disability, illness or injury, we may be able to agree pre-examination access arrangements. These arrangements help a candidate by minimising accessibility barriers and maximising their opportunity to demonstrate their knowledge, skills and understanding in an assessment.

Important:

- Requested access arrangements should be based on evidence of the candidate's barrier to assessment and should also reflect their normal way of working at school; this is in line with *The Cambridge Handbook* **www.cambridgeinternational.org/eoguide**
- For Cambridge International to approve an access arrangement, we will need to agree that it constitutes a reasonable adjustment, involves reasonable cost and timeframe and does not affect the security and integrity of the assessment.
- Availability of access arrangements should be checked by centres at the start of the course. Details of our standard access arrangements and modified question papers are available in *The Cambridge Handbook* **www.cambridgeinternational.org/eoguide**
- Please contact us at the start of the course to find out if we are able to approve an arrangement that is not included in the list of standard access arrangements.
- Candidates who cannot access parts of the assessment may be able to receive an award based on the parts they have completed.

After the exam

Grading and reporting

Grades A*, A, B, C, D or E indicate the standard a candidate achieved at Cambridge International A Level. A* is the highest and E is the lowest grade.

Grades a, b, c, d or e indicate the standard a candidate achieved at Cambridge International AS Level. 'a' is the highest and 'e' is the lowest grade.

'Ungraded' means that the candidate's performance did not meet the standard required for the lowest grade (E or e). 'Ungraded' is reported on the statement of results but not on the certificate. In specific circumstances your candidates may see one of the following letters on their statement of results:

- Q (PENDING)
- X (NO RESULT).

These letters do not appear on the certificate.

If a candidate takes a Cambridge International A Level and fails to achieve grade E or higher, a Cambridge International AS Level grade will be awarded if both of the following apply:

- the components taken for the Cambridge International A Level by the candidate in that series included all the components making up a Cambridge International AS Level
- the candidate's performance on the AS Level components was sufficient to merit the award of a Cambridge International AS Level grade.

On the statement of results and certificates, Cambridge International AS & A Levels are shown as General Certificates of Education, GCE Advanced Subsidiary Level (GCE AS Level) and GCE Advanced Level (GCE A Level).

School feedback: 'Cambridge International A Levels are the 'gold standard' qualification. They are based on rigorous, academic syllabuses that are accessible to students from a wide range of abilities yet have the capacity to stretch our most able.'

Feedback from: Director of Studies, Auckland Grammar School, New Zealand

How students, teachers and higher education can use the grades

Cambridge International A Level

Assessment at Cambridge International A Level has two purposes:

- to measure learning and achievement
  The assessment:
  - confirms achievement and performance in relation to the knowledge, understanding and skills specified in the syllabus, to the levels described in the grade descriptions.
- to show likely future success
  The outcomes:
  - help predict which students are well prepared for a particular course or career and/or which students are more likely to be successful
  - help students choose the most suitable course or career.

Cambridge International AS Level

Assessment at Cambridge International AS Level has two purposes:

- to measure learning and achievement
  The assessment:
  - confirms achievement and performance in relation to the knowledge, understanding and skills specified in the syllabus.
- to show likely future success
  The outcomes:
  - help predict which students are well prepared for a particular course or career and/or which students are more likely to be successful
  - help students choose the most suitable course or career
  - help decide whether students part way through a Cambridge International A Level course are making enough progress to continue
  - guide teaching and learning in the next stages of the Cambridge International A Level course.

Grade descriptions

Grade descriptions are provided to give an indication of the standards of achievement candidates awarded particular grades are likely to show. Weakness in one aspect of the examination may be balanced by a better performance in some other aspect.

Grade descriptions for Cambridge International A Level English Language will be published after the first assessment of the A Level in 2021. Find more information at **www.cambridgeinternational.org/alevel**

Changes to this syllabus for 2024, 2025 and 2026

The syllabus has been updated. This syllabus is version 2, published October 2021.

You are strongly advised to read the whole syllabus before planning your teaching programme.

Changes to version 2, published October 2021

Changes to syllabus	• Amendments have been made to the underlining in certain examples given in the Reference table of International Phonemic Alphabet (IPA) phonemic symbols (Received Pronunciation) on page 21 of the syllabus document.

Any textbooks endorsed to support the syllabus for examination from 2021 are still suitable for use with this syllabus.

School feedback: ‘While studying Cambridge IGCSE and Cambridge International A Levels, students broaden their horizons through a global perspective and develop a lasting passion for learning.’

Feedback from: Zhai Xiaoning, Deputy Principal, The High School Affiliated to Renmin University of China

We are committed to making our documents accessible in accordance with the WCAG 2.1 Standard. We’re always looking to improve the accessibility of our documents. If you find any problems or you think we’re not meeting accessibility requirements, contact us at **info@cambridgeinternational.org** with the subject heading: Digital accessibility. If you need this document in a different format, contact us and supply your name, email address and requirements and we will respond within 15 working days.

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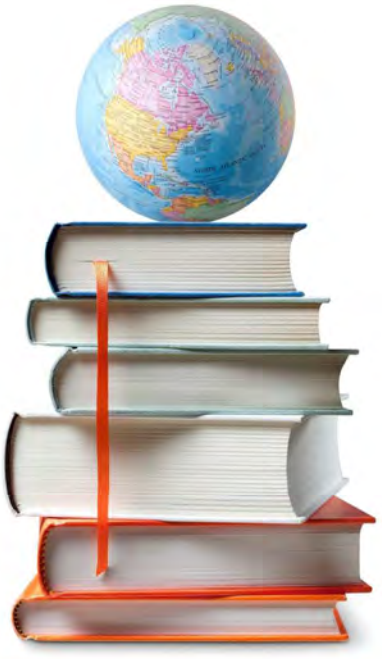
Cambridge Assessment International Education

Interactive

Learner Guide

Cambridge International AS & A Level English Language 9093

For examination from 2021



Cambridge Pathway

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Section 1: About this guide

This guide explains what you need to know about your Cambridge International AS & A Level **English Language** course and examinations.

It will help you to:

- understand what skills you should develop by taking this Cambridge International AS & A Level course
- understand how you will be assessed
- understand what we are looking for in the answers you write
- plan your revision programme
- revise, by providing revision tips and an interactive revision checklist (Section 7).

Following a Cambridge International AS & A level programme will help you to develop abilities that universities value highly, including a deep understanding of your subject; higher order thinking skills (analysis, critical thinking, problem solving); presenting ordered and coherent arguments; and independent learning and research.

Studying Cambridge International AS & A Level **English Language** will help you to develop a set of transferable skills, including the ability to work with linguistic information; think logically and independently; consider accuracy; understand situations from a linguistic point of view; analyse language and reflect on findings.

Section 2: Syllabus content - what you need to know

This section gives you an outline of the syllabus content for this course. There are four components, which can be combined in specific ways (see Section 3). Talk to your teacher to make sure you know which components you will be taking.

Content section	Assessment	Topics included
Reading	Paper 1 AS and A Level	You will develop your knowledge and understanding of a wide range of written texts such as: • advertisements • brochures • leaflets • editorials • news stories • articles • reviews • blogs • investigative journalism • letters • podcasts • (auto)biographies • travel writing • diaries • essays • scripted speech • narrative writing • descriptive writing.
Writing	Paper 1 AS and A Level	The knowledge and understanding that you will need to show in Paper 2 is the same as is covered in Paper 1 but you will apply your skills and techniques in a number of ways, including: • writing for a specific audience and purpose. • structuring your writing • using a range of appropriate linguistic and literary features • expressing ideas accurately and clearly • reflecting upon and evaluating the qualities of your own writing, including aspects relating to its purpose, form and audience

Content section	Assessment	Topics included
Language Analysis Section A: Language change Section B: Child language acquisition	Paper 3 A Level only	When studying **Language change** you will explore: • how English has developed from Early Modern to Contemporary English • graphology, spelling, phonology, morphology, syntax, lexis, grammar and the ways meaning might change when language in use • n-gram graphs, concordance and word tables You will develop your use of terminology related to language change, and explore relevant theories and theorists. When studying Child language acquisition you will explore: • the stages of early development of language in children aged 0-8 years. • the various features and functions of children's spoken language • relevant theories and theorists of child language. • how children's language develops • how to interpret and analyse spoken language transcriptions • how to analyse conversation involving children • how to plot your findings alongside relevant theories
Language Topics Section A: English in the world Section B: Language and the self	Paper 4 A Level only	When studying **English in the world** you will explore: • the history of English as a 'global' language • the development of standard and nonstandard forms of English i • ethical considerations related to the continuing expansion of English usage around the world. • colonialism, cultural influence and effects • multilingualism • the future of English • varieties of English • standard and nonstandard 'Englishes' • official and unofficial attitudes and policies • relevant ethical considerations • language shift and death • cultural imperialism, equality of opportunity, and global cooperation You will develop skills and techniques in reading and demonstrating critical understanding of unseen texts. When studying **Language and the self** you will explore: • how we use language to communicate our sense of self to others • how language might be innate, learned, or both • the ways in which language and thought are both connected and separate from each other • how we use language, both consciously and unconsciously, to construct and maintain our identity. • behaviourism, innatism, nativism and empiricism • linguistic relativity and determinism, universalism, language of thought hypothesis • the relationship between language and social identity • speech communities and prestige • idiolect, dialect, sociolect, genderlect

Content section	Assessment	Topics included
		• standard and nonstandard features • inclusion and exclusion • speech sounds and accents You will develop skills and techniques in reading and demonstrating critical understanding of unseen texts relating to 'Language and the self', selecting and analysing pertinent ideas and examples from the texts and relating these ideas and examples to theories, theorists and studies from your wider study of the topic.

Make sure you always check the latest syllabus, which is available from our public website. This will also explain the different combinations of components you can take.

Prior knowledge

We recommend that you have completed either the Cambridge IGCSE™ First Language English or Cambridge O Level English Language.

Key concepts

Key concepts are essential ideas that help you to develop a deep understanding of your subject and make links between different aspects of the course.

The key concepts for Cambridge International AS & A Level English Language are:

- Text and context

It is important to understand that 'a text' can range from a short conversation, to a book published across several volumes. Furthermore, all texts have a context, which can refer to the time period or situation where something happens, was written or spoken. This can help to explain it and may help your understanding of the language. As an English language learner you should always consider the meaning of a text due to the circumstances of where and when it was produced, how it's communicated and how it's received.

- Meaning and style

As an English language learner, you should consider how form, structure and language help to create a distinctive writing style. While studying your A Level in English Language you will develop a range of skills and techniques to identify and analyse how linguistic features in your own and other's writing and spoken language create different effects and meanings.

- Audience

As an English language learner, you will need to identify and analyse the ways that writers and speakers use and adapt language to communicate with their intended audience(s). Likewise, you must be able to predict, recognise and analyse the different responses the audience(s) may give depending on context, gender, age, race, class etc.

- Creativity

Throughout your English language learning you will need to think creatively and show your creativity in a range of forms and contexts such as writing for a specific purpose and audience or analysing a challenging text.

- Diversity

You will learn that language is constantly subject to a range of influences – whether personal, social, geographical or otherwise – and that the English language exists in a range of forms at any given moment. Understanding how diverse language can be will offer you many opportunities for analysis, comparison and exploration.

- Change

As a learner of English language you will learn how the sounds, shapes, meaning and style of letters, words and syntax can change over time. You will learn how to analyse these changes and explore the reasons why these changes may have taken place.

Section 3: How you will be assessed

Cambridge International AS Level English Language makes up the first half of the Cambridge International A Level course in English Language and provides a foundation for the study of English Language at Cambridge International A Level.

About the examinations

For AS Level you will take Paper 1 and Paper 2 only

For the full A Level you will take Paper 1, Paper 2, Paper 3 and Paper 4

These are summarised in the table below. Find out from your teacher which papers you will be taking.

About the papers

The table gives you further information about the examination papers:

Component	Time and marks	Questions	Percentage of qualification
Paper 1: **Reading**	2 hours 15 minutes 50 marks	You will need to answer two compulsory questions: • Question 1 in Section A • Question 2 in Section B.	50% of the AS Level 25% of the A Level
Paper 2: **Writing**	2 hours 50 marks	You will need to answer two questions: • Question 1 in Section A is compulsory • One question from a choice of three in Section B.	50% of the AS Level 25% of the A Level
Paper 3: **Language Analysis**	2 hours 15 minutes 50 marks	You will need to answer two compulsory questions: • Question 1 in Section A • Question 2 in Section B.	25% of the A Level
Paper 4: **Language Topics**	2 hours 15 minutes 50 marks	You will need to answer two compulsory questions: • Question 1 in Section A • Question 2 in Section B.	25% of the A Level

Section 4: What skills will be assessed?

The areas of knowledge, understanding and skills that you will be assessed on are called **assessment objectives** (AOs).

Assessment objectives (AO)	What does the AO mean?
AO1: Read and demonstrate understanding of a wide variety of texts.	You will need to show the examiner that you have developed your reading skills and techniques using the texts provided in the exam paper. The examiner will be looking at your knowledge and understanding of linguistic and literary features, as well as your ideas about the ways audience, purpose, style and context influence the meaning of texts.
AO2: Write effectively, creatively, accurately and appropriately, for a range of audiences and purposes.	For AO2, the examiner will be looking at your skills and techniques in writing, including how your writing is appropriate for the audience, purpose and form specified in the question on the exam paper. You will need to write in a structured way, expressing your ideas accurately and clearly, using linguistic and literary features, such as imagery, rhetorical devices or evaluative terms.
AO3: Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style.	Here, you need to be able to analyse and compare the texts presented in the exam paper. The examiner will be looking at how you choose features from the text to use as evidence for your ideas on form, structure and language, comparisons you may make, and the way in which you bring your ideas together.
AO4: Demonstrate understanding of linguistic issues, concepts, methods and approaches.	For AO4, you will need to apply theories to support your ideas about language, using the knowledge and understanding from the Syllabus and from your wider study. The examiner will be looking at how you refer to theories and theorists to support your ideas and how you show the depth of your knowledge and understanding.
AO5: Analyse and synthesise language data from a variety of sources.	You will need to show that you have developed techniques in understanding of texts, graphs and tables which offer information on language. The examiner will be looking at how you use the data presented in the question as evidence for your ideas and how you bring your ideas together to form effective analysis.

It is important that you know the different weightings (%) of the assessment objectives, as this affects how the examiner will assess your work.

The approximate weightings given to each of the assessment objectives (AOs) are given below:

Assessment objectives as a percentage of each qualification

Assessment objective	Weighting at AS Level %	Weighting at A Level %
AO1	15	20
AO2	45	30
AO3	40	20
AO4	–	20
AO5	–	10
Total	100	100

Assessment objectives as a perventage of each component

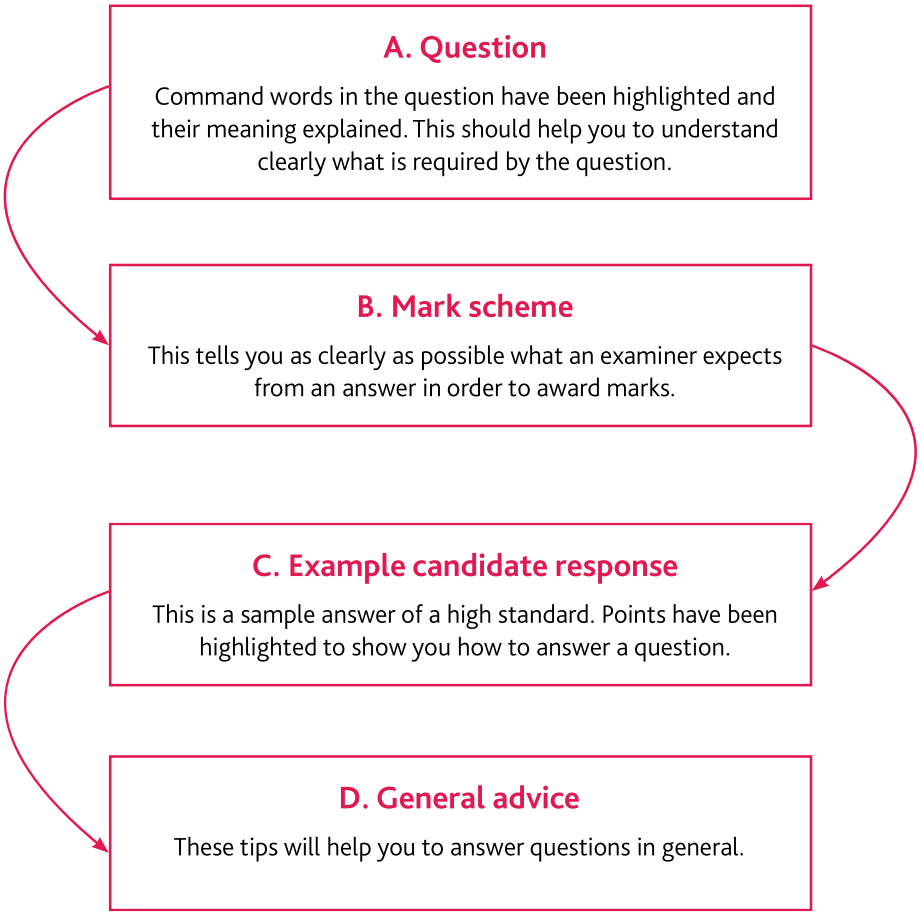
Assessment objective	Weighting in components %			
	Paper 1	Paper 2	Paper 3	Paper 4
AO1	30	–	10	40
AO2	10	80	10	20
AO3	60	20	–	–
AO4	–	–	40	40
AO5	–	–	40	–
Total	100	100	100	100

Section 5: Example candidate response

This section takes you through an example question and candidate response. It will help you to see how to identify the command words within questions and to understand what is required in your response. Understanding the questions will help you to know what you need to do with your knowledge. For example, you might need to read something, write something, analyse something, compare something or discuss something.

All information and advice in this section is specific to the example question and response being demonstrated. It should give you an idea of how your responses might be viewed by an examiner but it is not a list of what to do in all questions. In your own examination, you will need to pay careful attention to what each question is asking you to do.

This section is separated as follows:



A. Question

Command words

Question 1 is set into two parts; you'll need to be able to write in a very different way for each of these two separate tasks.

The command words in Question 1(a) are 'Write the text for the leaflet'.

In Question 1(a) you are given the expected word count – no more than 400 words – so the examiner will expect your response to be approximately that length, and you should divide your exam time accordingly.

Question 1

Your headteacher has asked you to produce a leaflet called *Leaving Home*. The leaflet will be aimed at older teenagers who are going to live in another town or city to go to university.

(a) Write the text for the leaflet, using no more than 400 words. In your writing, give advice and guidance on how to manage living away from your family for the first time. [15]

In this part of the question, you are only asked to write the text – you don't need to add drawings, or spaces which would be filled with images, even though such items might appear in a printed leaflet. The examiner will only look at your writing, and how you've crafted it to fit the task.

It would be very useful, however, to think about the overall layout of your text. For example, you should consider how the use of headings, subheadings and paragraphing would improve the form of the leaflet. Bear in mind that these features may also streamline your focus when writing.

The command words in Question 1(b) are also in two parts: firstly:

The command words in Question 1(b) are also in two parts: firstly: 'Write a reflective commentary on your text'

and then 'explaining how your linguistic choices contribute to fulfilling the task'.

(b) Write a reflective commentary on your text, explaining how your linguistic choices contribute to fulfilling the task set by your headteacher. [10]

Let's look at what the examiner will expect from your reflective commentary. This can be written using the first person: after all, it is your writing you are reflecting on. Your commentary should contain a logical sequence of ideas and you should use a good standard of written English.

Firstly, you should decide which features of your writing you are going to reflect on, for example: style, lexis, grammar, register, semantics or pragmatics. You then need to explain why you made these writing choices and how you feel they are appropriate to what you've been asked to do in the question. You do not need to mention all of the linguistic frameworks listed in the example above, instead it is better to select the features or frameworks carefully and be prepared to write fully on just a few of them.

The reflective commentary is an opportunity for you to evaluate your choices: think about how well you have achieved the focus of the question in the language features you have used.

B. Mark scheme

Assessment objectives and mark scheme criteria	Explanation
AO2: Write effectively, creatively, accurately and appropriately for a range of audiences and purposes	Your writing in Question 1(a) will be marked using AO2. You need to be able to: • write creatively in the form, and for the purpose, specified in the question. • engage your audience with the language choices you make. • structure and develop your ideas logically • maintain your engagement with your audience, making sure all of your answer is relevant to the task. • write accurately using a wide range of language features.
AO3: Analyse the ways in which writers' and speakers' choices of form, structure and language produce meaning and style	Your writing in Question 1(b) will be marked using AO3. You need to be able to: • explain and evaluate your writing, commenting on the form, structure, language you have used and how these give meaning to your writing. • explain and evaluate your style, commenting on the ways you have related to your audience.

C. Example candidate response

Question 1(a)

(1) So, congrats! You've aced your A levels, and now it's the time you've been waiting for. Time to wave bye bye to your bro, sis, Ma, Pa and pet goldfish and head off for Universityville, Freedom County, zip code IND3P3ND3NC3. Yay! But before you pack your lifetime collection of odd socks and a year's supply of chocolate, hang on a minute and have a look at some valuable advice from me, your friendly expert Uni Preparation Guide.

(2) **Tempted to squander? Try not to blunder!**

Too posh to look after your dosh? Or in too much of a daze to save? At Uni, you'll be in charge of your own money for the first time in your life. It may feel pretty amazing to have all that filthy lucre to manage. Keep a track of everything you spend so you don't run out of cash when you're going to need it most. Always make sure you've allowed enough for rent, food, books and travel before you're even tempted to treat yourself to that extra-special customised Porsche.

JK! For that you'll have to wait until you've graduated...

(3) **Eating like Einstein**

We all know that students need brainpower, brains need food and food equals fuel, but what kind of fuel are you going to feed that thinking machine inside your head? Burgers? Fries? Ice cream? Cake? Uh-oh! Take-aways are super-high in empty calories and astronomical in cost. Instead, take time to select fresh fruit and veg to cook yourself; choose pasta for slow-release carbs. Eating healthily, you'll feel good, learn more efficiently and you won't be allowing unhealthy choices to chow down on your budget!

(1) Right from the start, the candidate addresses the audience directly in a very informal style which is appropriate to the task. This is very engaging and uses lots of language devices such as abbreviation, neologisms (new made up words), Americanisation and text language. There is excitement implied by the exclamation mark and capitals, giving a lively feel to the writing.

(2) The writing carries on in its journalistic style, using internal rhyme, with direct questions to the audience. Notice the use of 'filthy lucre' though – the candidate is careful to use some low frequency lexis to maintain the idea of speaking to potential university students.

There is something else important to note in this paragraph: although the level of formality is low (using the popular abbreviation 'JK' for example), the candidate is aware that the task of 'advice' was originally given by the headteacher and shows awareness of this aspect of the question.

(3) Look at the different ways the response uses sentence structures. There is a wide variety of sentence types here. Note how the longer and more complex sentences contain the serious messages and how the short, or incomplete sentences are used to maintain the humorous aspect of the writing.

(4) Tickety tock

No doubt having made all those new friends, you'll be desperate to become the life and soul of the party, but late nights and disco fever can take their toll. Sure, use your planner to detail which nights you're meeting your mates, league match fixtures and hot dates with the girl who sits on the front bench of the lecture theatre, but plot in your lecture timetable, seminar dates and assignment deadlines first. If you manage your time carefully, you won't need to give your fave band's next gig a miss because you've an essay to hand in the next day – you'll have that essay proof-read and printed, smug as you like.

Good luck, peeps! And enjoy! (5)

Specimen answer 1(b): Reflective commentary

(1) *I decided to write the text for my leaflet in the same chatty style as that used in popular magazines which are aimed at teenagers, giving a light-hearted and humorous feel to the text whilst offering serious messages. My reason for the humour was to attract and maintain the attention of the target audience of older teenagers; on the other hand I felt that the information and advice the leaflet was offering needed to be sensible and worthwhile, as the original instructions had come from the headteacher – therefore he also needed to approve of what I wrote.*

(2) *The structure of the leaflet is set into separate paragraphs, to make the overall graphology of the leaflet clear and easy to read. I used subheadings which have catchy titles including ellipsis and rhetorical question ('Tempted to squander?') coupled with a rhyming imperative ('Try not to squander!) and alliteration ('Eating like Einstein' and 'Tickety tock . . .' as I felt they needed to match the overall style of writing, rather than just state 'Healthy Eating', for example, at the top of the third paragraph which would seem too formal for the writing style I chose.*

(4) You will see how effective the overall organisation of the writing has been made with the use of headings and clear paragraphing. The candidate has checked spellings and there is a logical flow of ideas which bring the writing to the required word count.

(5) The candidate selected three topics for advice: finance, healthy eating and time-keeping. All of these are relevant and the response is crafted very well – make sure you look at all of the question though. Here, the response does not tackle the idea of moving to 'a new town or city'.

The response was awarded 14 out of 15 marks.

(1) The first paragraph comments on the overall style of the writing, using the first person to explain the ways in which the candidate has made choices to engage the audience but has also included advice which the headteacher would feel was valuable.

(2) Next, the candidate explains the reasons for the layout and the linguistic features of the headings used. You will see that a range of technical terminology is used accurately and fluently. There's an effective explanation here of how and why the level of formality was kept low on purpose.

(3) I used second person address throughout to create an intimate relationship between writer and audience. I wanted to enhance this by creating a very informal register, with flattery ('congrats') and colloquial terms such as 'JK', 'Yay!' and 'peeps' which were used to position the reader as an equal. The inclusion of 'zip code IND3P3ND3NC3' is set out to resemble text-speak, which also lowers the level of formality and is in capitals to imply shouting and excitement.

(3) The way this section is written is very confident in the explanation of how and why the relationship between reader and writer is created.

(4) My sentence structures include snappy fragments, 'So, congrats!' with the low register discourse marker opening the leaflet but more complex sentences containing the more serious messages, such as 'Keep a track of everything . . .' (paragraph 2) are positioned inside each paragraph. Hopefully this juxtaposition of structures acknowledges the fact that the leaflet is meant to appeal by being humorous whilst containing meaningful information.

(4) Here, the response loses some of its tone and is in danger of repeating itself. It's true that the original response was very rich in literary and linguistic features but it's better to select what you feel are the most successful than have a list of them running through the commentary. It's in this paragraph that the commentary starts to be rather 'chatty' – make sure you maintain your register and tone throughout your commentary.

Some of the features I used were intended to enhance the feeling of excitement about going to university. Therefore 'Too posh to look after your dosh? or in too much of a daze to save?' include rhyme on 'posh' and 'dosh' and assonance in 'daze' and 'save' inside rhetorical questions with ellipsis, to create an interesting rhythm. However, I also used hyperbole in 'super-high' and 'astronomical' to reinforce my warning about eating fast food in paragraph 3. By combining these features, I wanted to give an overall impression of everything that going to university might mean, which should be an exciting but maybe also a tricky time for young people leaving home for the first time.

(5) On reflection, I feel that I have achieved my aims in my writing. I wondered at first whether I had chosen too many colloquial features and not enough low frequency lexis or formal grammatical structures although when I considered that my main purpose was to get teenagers to read my leaflet, when I read through my writing I felt that I had a good balance of informality of style and formality of sensible advice.

(5) The reflection and evaluation are balanced; look how the candidate refers to what was 'considered' which implies that time was spent before the writing began, making sure that the response fitted the task properly.

Although the reflection and evaluation are balanced, these are used as a conclusion to the commentary. It would have been more effective to reflect within each paragraph of the commentary to make sure the writing flows and makes a cohesive whole.

The response for Question 1(b) was awarded 9 out of 10 marks.

This means that overall for Question 1, 23 out of 25 marks were awarded.

D. How the answer could have been improved

Both parts of the specimen answer are high-grade responses although there are ways in which improvements could have been made.

Although in part (a), the candidate has written the text in a very engaging manner, and has addressed most of the question content, there is no advice to the target audience of living in another town or city, nor does it directly address the age of the target audience, in this case older teenagers. If the candidate had used these two ideas alongside the ideas already incorporated in the response, the examiner would know that a complete exploration of all aspects of the question had been made.

The part (b) specimen response shows balanced explanations which address the question. This means that the candidate has made a careful selection from the writing in part (a) in order to explain why the linguistic choices were made and how they fulfil the task. Even so, the candidate's register could be a little more formal and less chatty. Although you will be describing your own writing and possibly using the first person to do so, the examiner will look for a good standard of written English which incorporates a wide range of technical terminology being used to describe language.

E. Common mistakes and misconceptions

Look carefully at the weighting of marks for each part of the question: fifteen marks are available for Question 1(a) and ten marks are available for Question 1(b). This doesn't mean that you should cut your commentary short, which is a mistake which is often made. You'll need to plan your exam time carefully though – often candidates will put all their writing energy into Question 1(a) and run out of steam for the second part of the question. It's a common misconception that your commentary is a supplementary or add-on item to the question – in fact it an important part of the overall requirement of the exam. You will be proving to the examiner that you can write in two distinct ways and for 25 marks overall.

Before you start your writing in the exam, you will probably want to make a plan which will help you focus. It's a common mistake to put so much time and detail into the plan that there's not enough exam time left to complete the writing task set. Look upon the plan as a tool to help you, rather than something elaborate for your finished writing to duplicate.

It's a common mistake to forget about paragraphing when ideas are in full creative flow! Make sure your writing is clearly set out, with well-defined paragraphs separating your ideas. This will give the logical organisation to your writing that the examiner is looking for and will help maintain your own focus.

Depending on the form of text asked for Question 1(a), candidates are often tempted to enhance the look of the specified form by putting in illustrations. It's a common misconception that these are useful: instead, concentrate on using a wide variety of linguistic choices relating to audience and meaning, improving your style and giving yourself a range of features you can reflect upon in your commentary.

When you're writing your commentary, be careful when you quote from your own writing. It's a common mistake to quote whole sentences (or even paragraphs!) to support ideas but it's better to use just one or two brief examples to justify your point.

Where it's appropriate to the form required in Question 1(a) you might write in an informal style and register. It would be a mistake, though, to continue like that in your reflective commentary. There you should use a wide range of technical terminology to describe and explain your choices.

It's a common misconception that a response to Question 1(b) should be merely a brief description of your writing in Question 1(b). Make sure you give reasons for your language choices and that you reflect on whether you have achieved your aims. If you think you could have improved your writing in some way, then explain how – and if you think you have been successful then say how and why!

General advice

Read all parts of the question very carefully before deciding on your approach. For Question 1(a) you could consider the following points to get you started:

- Who is your target audience?
- How are you going to impart meaning to your audience?
- What style of writing will you adopt?
- What register will you use?
- Will you use rhetorical devices?
- What about the overall layout (graphology) of your finished text?

For Question 1(b) you might think about:

- Do I need to change the register and style of my writing to achieve my reflective commentary?
- Which features of my writing do **I** feel are the most important ones to reflect upon?
- What should I select from my writing to support the points I intend to make?
- Which features of my writing have achieved my writing aims?
- Which features of my writing could be improved upon?

So you will know for the exam how long your writing will need to be to achieve the word count in Question 1(a), practise writing 400 words of your creative choice lots of times. By doing this you will be able to see the amount of text you will be expected to create.

Each time you perform this task, keep an eye on the time and try to think how you would alter your writing times to fit in with the exam timing.

Where you've created writing in class or for homework, write a reflective commentary each time. Ask yourself what linguistic choices you have made, give yourself a heading for each one and then write a paragraph on each. Headings are not required in the exam but for your practice, they will help you to focus clearly. In the exam you could use headings as a brief plan for your commentary.

Whenever you write, whether it is in class, for homework, or in the exam – read through your finished piece and check your spelling, punctuation and grammar. Of course, in class or at home you will be able to use a dictionary – make sure you learn those tricky spellings before the exam!

Make sure you can use a wide range of technical terminology fluently and accurately: get used to incorporating this in class and in your homework and use a glossary of terms in your revision.

Section 6: Revision

This advice will help you revise and prepare for the examinations. It is divided into general advice and specific advice for each of the papers.

Use the tick boxes ☐ to keep a record of what you have done, what you plan to do or what you understand.

General advice

Before the examination

- ☐ Find out when the examinations are and plan your revision so you have enough time for each topic. A revision timetable will help you.
- ☐ Find out how long each Paper is and how many questions you have to answer.
- ☐ Know the meaning of the command words used in questions and how to apply them to the information given. Highlight the command words in past papers and check what they mean. There is a list on p11 of this guide.
- ☐ Make revision notes; try different styles of notes.

- ☐ Work for short periods then have a break. Revise small sections of the syllabus at a time.
- ☐ Build your confidence by practising questions on each of the topics.
- ☐ Make sure you practise lots of past examination questions so that you are familiar with the format of the examination papers. You could time yourself when doing a paper so that you know how quickly you need to work in the real examination.
- ☐ Look at mark schemes to help you to understand how the marks are awarded for each question.
- ☐ Make sure you are familiar with the technical terminology that you need for this syllabus. Your teacher will be able to advise you on what is expected.
- ☐ Check which theories and theorists are appropriate for the relevant topic you are revising, and which ones you need to learn.

During the examination

- ☐ Read the instructions carefully and answer **all** the questions. In Paper 2, don't forget that in Section B, you will have a choice of three questions. Don't be tempted to answer all of these!
- ☐ Check the number of marks for each question or part question. This helps you to judge how long you should be spending on the response. You don't want to spend too long on some parts of the questions and then run out of time at the end.
- ☐ Do not leave out questions or parts of questions. Remember, no answer means no marks.
- ☐ You do not have to answer the questions in the order they are printed in the answer booklet. You may be able to do a later question more easily then come back to an earlier one for another try.
- ☐ Read each question very carefully. Misreading a question can cost you marks: Identify any command words – you could underline or highlight them. Identify the other key words and perhaps underline them too.
- ☐ Read all parts of a question before starting your answer. Think carefully about what is needed for each part. You will not need to repeat material.
- ☐ For n-gram graphs, look very carefully at the information you are given, read the title, key, axes, etc. to find out exactly what they show. For word tables, look at any headings for clues as to what the question is about.
- ☐ **Answer the question.** Use your skills and techniques to show your knowledge and understanding. Don't just try to write about everything you know. Only use the knowledge, understanding, skills and techniques you need to answer the question.

- ☐ Make sure that you have answered everything that a question asks. Sometimes one sentence asks two things, e.g. 'Write … and explain …'. It is easy to concentrate on the first request and forget about the second one.
- ☐ Always check your spelling. The examiner is looking for a good standard of accurately written English.
- ☐ Use the correct linguistic terminology in your answers when possible.
- ☐ Make sure all your writing is clear, and that your paragraphs form a logical sequence.
- ☐ If you need to change a word, it is better to cross out your work and rewrite it. Don't try to write over the top of your previous work as it will be difficult to read.
- ☐ Don't write your answers in columns, or add diagrams. The examiner is looking for your English language skills, not your artwork!

Advice for all Papers

- ☐ Don't write in note form – the examiner is looking for fluent, logically structured prose responses.
- ☐ Read through your responses before the exam is finished: have you checked your spellings? Do your paragraphs flow in an organised manner?
- ☐ Make sure your knowledge and understanding of technical terminology is tip-top, and that you can use it fluently and accurately.
- ☐ Read as much as you can, to absorb form, style, meaning, purpose and structure.
- ☐ Write as much as you can, to ensure that when the exam approaches you don't feel as though you don't know where to start.
- ☐ Get used to analysing everything you read, whether it is a 500-page novel or the back of a cereal packet!
- ☐ Get used to analysing everything you write – be honest with yourself but don't feel you should be harsh on yourself all the time, you should take confidence in your own ability to create good quality writing!
- ☐ Share your writing with your friends and family – tell them what your writing aims have been, and ask for their constructive criticism.

Advice for Paper 1

- ☐ Make sure you know the difference in the forms and styles of writing which may appear in advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.
- ☐ Make sure you understand exactly what is required by the directed writing task in response to a text (10 marks).
- ☐ Make sure you can use language to compare the form, structure and language of your own response in part (a) with that of the original text (15 marks).
- ☐ Make sure you know how much of your own handwriting corresponds to the word count Question 1(a), which is 150-200 words. This is only a small word count, so don't waste valuable words, and don't make your response too brief!
- ☐ Practise writing whenever you can – look at lots of varieties of texts, then choose your vocabulary, style and structure to match or contrast with the form, purpose and audience of the text you are reading.

Advice for Paper 2

- ☐ Make sure you feel confident to create writing in the form and style of writing which may be required in advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto) biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.
- ☐ Make sure you know how much of your own handwriting corresponds to the word count Question 1(a), which is approximately 400 words. This is only a short word count, so don't waste valuable words – on the other hand, don't make your response too brief! You need to be able to use your own writing to be able create an effective reflective commentary.
- ☐ Keep practising writing reflective commentaries on all of your classwork and homework. Make sure you use evaluative language, questioning yourself whether you have achieved your writing goals.

- [ ] Don't forget, in Question 1(b) the examiner will be looking at your focus on your choices of form, structure and language, and your analysis of how these stylistic choices relate to audience and shape meaning. Use the first person in your explanation and evaluation if you wish, but make sure you use technical terminology to describe your linguistic choices.
- [ ] Don't answer all of the questions in Section B – you need to make a choice of one out of three questions. Play to your strengths: if you are more confident in creating narrative writing, answer that question; if you prefer to write argumentatively, answer that question, and so on.

Advice for Paper 3

- [ ] For Section A, before the exam, look for and read closely as much historical prose that you can find, to make sure you are as familiar as possible with examples of English from the Early Modern period to Contemporary English.
- [ ] Make sure you know all the terminology you will need to describe, explain and evaluate the language presented by the changes in the English language.
- [ ] Look for n-gram graphs representing changes in language use over time – you can use the Google n-gram site and insert words of your choice, or words that interest you from something you are reading – that way you are creating your own n-grams! Read the n-grams very carefully so you can see what language changes the data is showing.
- [ ] Use the internet to find word tables from corpus data, looking for collocate lists and synonym lists. Think carefully: what are these data telling you? How do they compare with data you have found on any n-grams?
- [ ] For Section B, make sure you are confident in reading and interpreting transcriptions of spoken language. There are strict conventions in conversation transcriptions and they look very different from a script from a play, for example. By the time the exam approaches, you shouldn't need to refer to the transcription key; you should be an expert!
- [ ] Make sure you know which theories and theories are appropriate to child language acquisition: it would be unlikely, for example, that a gender theorist would be an appropriate reference to six year old children's spoken language.

Advice for Paper 4

- [ ] Paper 4 requires a different style of writing from that of Paper 3: you're now being asked to discuss two given topics which in turn are quite different from each other. Make sure you can adopt this 'discursive' style of writing by practising setting up arguments and counter-arguments around the two topics. You can do this in class or at home whenever the opportunity arises.
- [ ] For Section A, make sure you know about some of the varieties of English spoken around the world. These might be Hinglish, Singlish, Spanglish, one that you know from your own country, or many more that have arisen in the relatively recent past. They are also known as 'hybrids'.
- [ ] So that you are fully confident about the ethical considerations of English in the world, find articles from the Internet and newspapers which give reports on the topic. Such reports may contain information about cultural imperialism, equality of opportunity or global cooperation, for example. Some reports may contain bias: to practise your discursive style, set up your own arguments surrounding this bias.
- [ ] Make sure you have knowledge and understanding of the ways that English in the world has developed due, for example, to colonialism or technological developments over time.
- [ ] Be clear about which theories and theorists are relevant to the topic, making sure you can spell all names accurately. It's not enough just to mention names; the examiner will be looking for short explanations which support the points you are making – that way you will show that you are applying theories confidently.
- [ ] Make sure you have in-depth knowledge about language and social identity so that you can write fluently in Section B about speech communities, prestige, idiolect, dialect, sociolect, genderlect, variation, standard and nonstandard features, inclusion and exclusion, speech sounds and accents – these are the features of our speech that make up our identity. Some of these we use on purpose (because we have learnt to do so), some of them come naturally to us (innately). Try to identify these features in yourself and others around you.

Revision checklists

The tables below can be used as a revision checklist: **It doesn't contain all the detailed knowledge you need to know, just an overview.** For more detail see the syllabus and talk to your teacher.

The table headings are explained below:

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Here is a list of the skills you need to cover and work on.	Here are some suggestions of how to practise your skills.	You can use the tick boxes to show when you have revised an item and how confident you feel about it. R = RED means you are really unsure and lack confidence; you might want to focus your revision here and possibly talk to your teacher for help A = AMBER means you are reasonably confident but need some extra practice G = GREEN means you are very confident. As your revision progresses, you can concentrate on the RED and AMBER items in order to turn them into GREEN items. You might find it helpful to highlight each topic in red, orange or green to help you prioritise.			You can use the Comments column to: • add more information about the details for each point • include a reference to a useful resource • add learning aids such as stories, articles or word play • highlight areas of difficulty or things that you need to talk to your teacher about.

Paper 1: Reading

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Reading Forms and styles	Read and understand the difference in forms and styles of writing which may appear in advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.	☐	☐	☐	
Reading Linguistic elements and literary features	Identify and use the linguistic elements and literary features of texts including parts of speech/word classes, vocabulary, figurative language, phonology, morphology, rhetorical devices, voice, aspect, tense, modality, narrative perspective, word ordering and sentence structure, paragraph- and text-level structure, formality/informality of tone and pragmatics.	☐	☐	☐	
Reading Audience	Identify and demonstrate knowledge and understanding of the significance of audience in both the design and reception of texts.	☐	☐	☐	
Reading Genre, purpose and context	Identify and demonstrate knowledge and understanding of the ways in which genre, purpose and context contribute to the meaning of texts.	☐	☐	☐	
Reading Meaning	Analyse the ways in which linguistic elements come together in a text to create meaning.	☐	☐	☐	
Writing Analysis	Write analytically about the effects produced by a range of linguistic elements and literary features.	☐	☐	☐	
Reading	Selecting and interpret words and phrases from a text with care and precision.	☐	☐	☐	
Writing	Integrate individual analytical points into a fluent, logically sequenced essay.	☐	☐	☐	
Reading Writing	Recognise and comment on the overall style of a text, and give examples of this through specific instances from the text.	☐	☐	☐	
Writing	Use quotations, evidence and evaluation, to produce precise, meaningful commentaries.	☐	☐	☐	
Writing	Use appropriate language to link quotations and evidence with explanatory comments.	☐	☐	☐	

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Writing	Integrate quotations and evidence into a cohesive argument.	☐	☐	☐	
Reading Writing	Write short, directed pieces in response to a text.	☐	☐	☐	
Reading Writing Style	Write in the same style as another text.	☐	☐	☐	
Reading Writing Style	Write in a different style from a text at the same time as re-using the content/ material.	☐	☐	☐	
Reading Writing	Compare the style and linguistic elements of your own writing with those of a given text.	☐	☐	☐	

Paper 2: Writing

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Writing Forms and styles	Write confidently in the following forms and styles: advertisements, brochures, leaflets, editorials, news stories, articles, reviews, blogs, investigative journalism, letters, podcasts, (auto)biographies, travel writing, diaries, essays, scripted speech, narrative writing, and descriptive writing.	☐	☐	☐	
Reading Writing Linguistic elements and literary features	Identify and use linguistic elements and literary features including parts of speech/word classes, vocabulary, figurative language, phonology, morphology, rhetorical devices, voice, aspect, tense, modality, narrative perspective, word ordering and sentence structure, paragraph- and text-level structure, formality/ informality of tone and pragmatics.	☐	☐	☐	
Reading Writing Audience	Show knowledge and understanding of the significance of audience in both the design and reception of texts.	☐	☐	☐	
Writing Genre, purpose and context	Show knowledge and understanding of the ways in which genre, purpose and context contribute to the meaning of texts.	☐	☐	☐	

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Writing Audience and purpose	Write for a specified audience and purpose, to fulfil the brief provided.	☐	☐	☐	
Writing Structure	Produce an appropriate structure for longer pieces of writing.	☐	☐	☐	
Writing Structure	Use a structure such as Freytag's Pyramid in imaginative writing.	☐	☐	☐	
Writing Discursive	Set up argument and counter-argument to structure discursive writing.	☐	☐	☐	
Writing Review	Use introductory, summary and evaluative sections in review writing.	☐	☐	☐	
Writing Literary purpose	Organising writing to achieve specific effects, such as withholding key information in imaginative writing to achieve tension and climax/anti-climax.	☐	☐	☐	
Writing Criticism	Use evidentiary logic in critical writing Use evaluative lexis in critical writing.	☐	☐	☐	
Writing Essay	Structure paragraphs, using topic sentences, connectives, internal coherence, discourse markers to form a fluent overall response.	☐	☐	☐	
Writing Descriptive	Use imagery in descriptive writing.	☐	☐	☐	
Writing Rhetoric	Use rhetorical devices in argumentative writing.	☐	☐	☐	
Writing Expression	Express ideas accurately and clearly at both sentence and word level.	☐	☐	☐	
Writing Reflection and evaluation	Reflecting upon and evaluate the qualities of your own writing, including aspects relating to its purpose, form and audience.	☐	☐	☐	

Paper 3: Language Analysis

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Language change Linguistic frameworks	Identify and write about the timeline and essential features of the development of the English language from Early Modern English to Contemporary English, including graphology, orthography, phonology, morphology, syntax, lexis, semantics, pragmatics and grammar.	☐	☐	☐	
Language change Concepts and terminology	Identify and write about concepts and terminology related to language change, including etymology, derivation, inflection, telescoping, coalescence, acronym, conversion, compounding, backformation, blending, borrowing, amelioration, pejoration, broadening and narrowing.	☐	☐	☐	
Language change Theories and theorists	Identify and write about theories and theorists of language change, including random fluctuation theory, cultural transmission theory, theory of lexical gaps, substratum theory, functional theory, and tree and wave models.	☐	☐	☐	
Language change *n*-grams	Use and interpret data from n-gram graphs representing changes in language use over time, including comparisons of related words, parts of speech, inflections, collocations.	☐	☐	☐	
Language change Word tables	Use and interpret data from n-gram graphs representing changes in language use over time, including comparisons of related words, parts of speech, inflections, collocations.	☐	☐	☐	
Language change Word tables	Use and interpret data from word tables derived from corpus data including collocate lists and synonym lists.	☐	☐	☐	
Language change Research	Show that you have explored research in the field of language change	☐	☐	☐	
Language change Analysis	Analysing unseen texts as exemplars of certain aspects of language change.	☐	☐	☐	
Language change Theories and concepts	Contextualise your findings from unseen texts alongside relevant theories and concepts relating to language change.	☐	☐	☐	
Writing	Synthesise your responses to a range of language data into a coherent analytical essay.	☐	☐	☐	

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Child language acquisition Stages of acquisition	Identify and write about the main stages of early development in child language acquisition, including babbling, holophrastic, telegraphic and post telegraphic stages.	☐	☐	☐	
Child language acquisition Functions	Identify and write about the different functions of children's language, including instrumental, regulatory, interactional, personal, representational, heuristic and imaginative.	☐	☐	☐	
Child language acquisition Theories and theorists	Apply your knowledge and understanding of theories and theorists of child language acquisition, including imitation and reinforcement theory, language acquisition device, language acquisition support system, cognitive development theory, and child directed or caretaker speech.	☐	☐	☐	
Child language acquisition Transcription Analysis	Identify and interpret the conventions and features of unscripted conversation and spoken language transcripts, including notation for pauses, overlaps, stress, intonation and phonemic features.	☐	☐	☐	
Child language acquisition Research	Explore research in the field of child language.	☐	☐	☐	
Child language acquisition Analysis	Analyse spoken language transcripts as exemplars of certain aspects of child language acquisition.	☐	☐	☐	
Child language acquisition Analysis Theories Concepts Writing	Contextualise findings alongside relevant theories and concepts relating to child language acquisition.	☐	☐	☐	
Child language acquisition Theories Writing	Synthesise theoretical examples into a coherent analytical essay.	☐	☐	☐	

Paper 4: Language Topics

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
English in the world Development	Show your knowledge and understanding of the historical development of English as a 'global' language, including colonialism, cultural influence and effects, concentric circles model, multilingualism, the future of English	☐	☐	☐	
English in the world Varieties	Identify and write about varieties of English, including standard and nonstandard 'Englishes', creolisation, sociolect continuum, and official and unofficial attitudes and policies.	☐	☐	☐	
English in the world Ethics	Identify and write about relevant ethical considerations, including language shift and death, cultural imperialism, equality of opportunity, and global cooperation.	☐	☐	☐	
English in the world Criticism	Read and demonstrate a critical understanding of unseen texts relating to 'English in the world'.	☐	☐	☐	
English in the world Analysis	Select and analyse relevant ideas and examples from the texts.	☐	☐	☐	
English in the world Theories and theorists	Relate ideas and examples to theories, theorists and studies from your wider study of the relevant topic area.	☐	☐	☐	
English in the world Writing	Synthesise your ideas and theoretical considerations into a coherent analytical essay.	☐	☐	☐	
Language and the self Innateness and learning	Identify and write about innateness and learning, including behaviourism, innatism, nativism and empiricism.	☐	☐	☐	
Language and the self Language and thought	Identify and write about the relationship between language and thought, including linguistic relativity and determinism, universalism, and the language of thought hypothesis.	☐	☐	☐	
Language and the self Language and social identity	Show your knowledge and understanding of the relationship between language and social identity, including speech communities, prestige, idiolect, dialect, sociolect, genderlect, variation, standard and nonstandard features, inclusion and exclusion, speech sounds and accents.	☐	☐	☐	
Language and the self Reading	Reading and demonstrate critical understanding of unseen texts relating to 'Language and the self'.	☐	☐	☐	

Skills and Knowledge	Ways to practise skills	R	A	G	Comments
Language and the self Analysis	Select and analyse relevant ideas and examples from the texts.	☐	☐	☐	
Language and the self Theories and theorists	Relate your ideas and examples to theories, theorists and studies from your wider research into Language and the self.	☐	☐	☐	
Language and the self Writing	Synthesise your considerations into a coherent analytical essay.	☐	☐	☐	

Section 7: Useful websites

The websites listed below are useful resources to help you study for your Cambridge International AS and A Level English Language.

Reading

http://www.studygs.net/fiction.htm

https://www.theguardian.com/books/2016/aug/23/literary-fiction-readers-understand-others-emotions-better-study-finds

https://www.forbes.com/sites/forbesagencycouncil/2018/07/18/six-ways-reading-fiction-makes-us-better-marketers/#4ad7281d63d3

Writing

https://www.dailywritingtips.com/creative-writing-101/

https://en.oxforddictionaries.com/writing-help/top-tips-for-creative-writing

https://www.dummies.com/education/language-arts/creative-writing/creative-writing-for-dummies-cheat-sheet/

Language Change

https://www.thehistoryofenglish.com/

https://www.englishclub.com/history-of-english/

https://en.oxforddictionaries.com/explore/the-history-of-english/

Child language acquisition

https://getrevising.co.uk/resources/child_language_acquisition_a_notes2

https://en.wikipedia.org/wiki/Language_acquisition

https://www.tes.com/teaching-resource/engb3-child-language-acquisition-notes-11272547

English in the world

https://www.linguisticsociety.org/

https://www.thehistoryofenglish.com/issues_global.html

https://www.bbc.co.uk/news/magazine-12017753

https://www.theguardian.com/news/2018/jul/27/english-language-global-dominance

Language and the self

https://www.psychologytoday.com/gb/blog/dreaming-freud/201411/how-much-does-the-language-we-speak-shape-our-identity

http://catalogue.pearsoned.co.uk/assets/hip/gb/uploads/M02_HALL5068_02_SE_C02.pdf

https://www.bloomsbury.com/uk/language-and-identity-9780567566140/

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t: +44 1223 553554
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CAMBRIDGE

International Education Facts and figures

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We work with schools worldwide to build an education that shapes knowledge, understanding and skills. Together, we help Cambridge learners be **ready for the world.**

- We are the world's largest provider of international education programmes and qualifications for 3 to 19 year olds.
- Over **10 000** schools in more than **160** countries offer Cambridge programmes and qualifications.
- Every year, nearly **a million** Cambridge learners prepare for their future with an education from Cambridge.
- Our teaching and learning resources are trusted by more than **1.5 million** teachers and learners worldwide.
- We are part of Cambridge University Press & Assessment, a not-for-profit organisation and part of the world-renowned University of Cambridge.

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- The Cambridge Pathway has **five stages**, including Cambridge Early Years which was launched globally in 2023.
- Cambridge Primary is taught in more than **2500** schools in over **120** countries. There are over **130 000** entries for Cambridge Primary Checkpoint every year.
- Cambridge Lower Secondary is taught in more than **4000** schools in nearly **140** countries. Every year we receive over **130 000** entries for Cambridge Lower Secondary Checkpoint, our tests for 11 to 14 year olds.
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- 2022 marked the **35th** anniversary of the first Cambridge IGCSE exam.
- More than **275 000** students worldwide took Cambridge IGCSE and O Level exams in our June 2023 series.
- We are the world's biggest provider of O Level qualifications. Cambridge O Level is taught in over **50** countries.



- Cambridge International AS & A Levels are taught in over **130** countries. Over **270 000** students around the world took Cambridge International AS & A Level exams in our June 2023 series.
- Over **2350** universities in **90** countries formally recognise Cambridge qualifications, including all UK universities and over **1000** in the US.

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- The first Cambridge exams were taken in Trinidad in **1864** by six candidates.
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Cambridge Assessment International Education

Cambridge Pathway – a guide for parents

Cambridge International prepares school students for life, helping them develop an informed curiosity and a lasting passion for learning. We are part of the University of Cambridge. Cambridge Pathway gives students a clear path for educational success from age 5 to 19. Schools can shape the curriculum around how they want students to learn – with a wide range of subjects and flexible ways to offer them. It helps students discover new abilities and a wider world, and gives them the skills they need for life, so they can achieve at school, university and work.

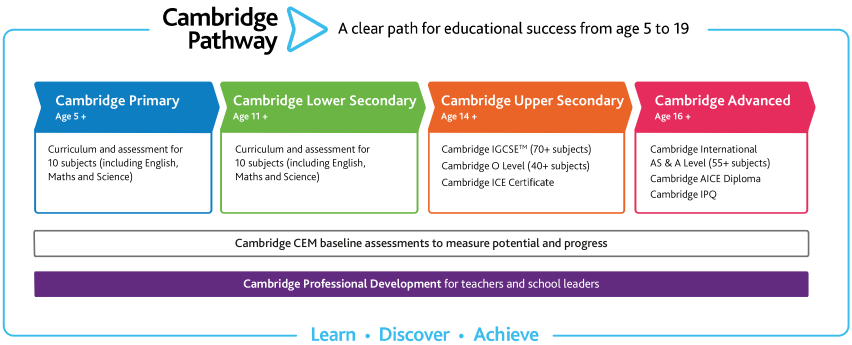
Your child's needs as a learner are at the heart of our approach to education. Our Cambridge Pathway helps give your child a love of learning that will stay with them through school, university and beyond.

Our approach supports schools to develop learners who are:

- **confident** in working with information and ideas – their own and those of others
- **responsible** for themselves, responsive to and respectful of others
- **reflective** and developing their ability to learn
- **innovative** and equipped for new and future challenges
- **engaged** intellectually and socially, ready to make a difference.

Cambridge Pathway

The four stages of Cambridge Pathway lead seamlessly from primary to secondary and pre-university years. Each stage builds on the learners' development from the previous one, but can also be offered separately. We give schools flexibility so they can build a curriculum to match the needs of each student.



At the end of the Cambridge Upper Secondary and Cambridge Advanced stages, your child can achieve globally recognised qualifications like Cambridge IGCSE™ or Cambridge International AS & A Level.





Benefits for your child

We believe education is most effective when curriculum, teaching, learning and assessment are closely aligned.

Cambridge Pathway helps students develop the deep subject knowledge, conceptual understanding and higher order thinking skills that they need for success at school, at university and in employment.

Opening up opportunities worldwide

Cambridge students can be confident that their qualifications are understood and valued throughout their education and career, in their home country and internationally.

Every year thousands of students use Cambridge qualifications to gain places at leading universities worldwide. Over 2100 universities recognise our qualifications, including nearly 850 universities in the US (including all the Ivy League) and all UK universities.

Students can easily find out which universities worldwide accept Cambridge qualifications by searching our online database at **www.cambridgeinternational.org/recognition**



A global learning community

With the Cambridge Pathway, your child is joining a global community of learners from more than 10 000 schools in over 160 countries. By developing a global outlook in Cambridge learners, we aim to equip them for success in the fast-changing modern world.

Learn more! For more information on the Cambridge Pathway visit **www.cambridgeinternational.org/pathway** or contact your school.

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Cambridge IGCSE™
A guide for parents

Cambridge International prepares school students for life, helping them develop an informed curiosity and a lasting passion for learning. We are part of the University of Cambridge. Our Cambridge Pathway gives students a clear path for educational success from age 5 to 19. Schools can shape the curriculum around how they want students to learn – with a wide range of subjects and flexible ways to offer them. It helps students discover new abilities and a wider world, and gives them the skills they need for life, so they can achieve at school, university and work.

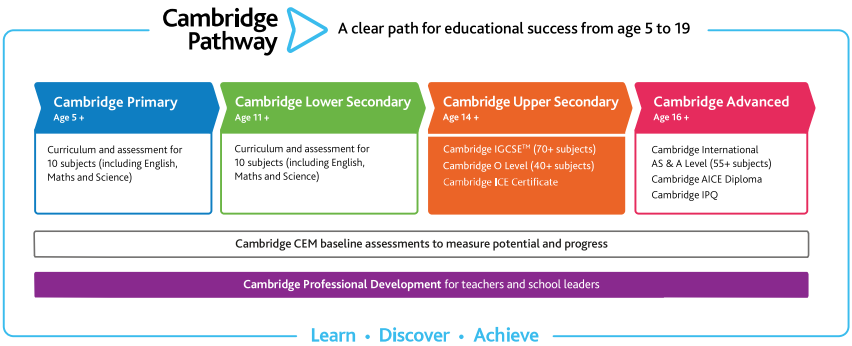
Your child's needs as a learner are at the heart of our approach to education. Our Cambridge Pathway gives your child a love of learning that will stay with them through school, university and beyond. Our approach supports schools to develop learners who are:

- **confident** in working with information and ideas – their own and those of others
- **responsible** for themselves, responsive to and respectful of others
- **reflective** and developing their ability to learn
- **innovative** and equipped for new and future challenges
- **engaged** intellectually and socially, ready to make a difference.



What is Cambridge IGCSE?

Cambridge IGCSE is the world's most popular international qualification for 14 to 16 year olds. It is taken in over 140 countries and in more than 4500 schools around the world.





Benefits for your child

Cambridge IGCSE helps students to develop knowledge, understanding and skills in subject content and intellectual enquiry. The programme has been designed for students worldwide, including those whose first language is not English.

We offer students the flexibility to choose from over 70 subjects at Cambridge IGCSE, meaning they can study the subjects they enjoy and are best at.

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Opening up opportunities worldwide

A Cambridge IGCSE qualification is recognised by leading universities around the world and employers view it as a valuable certificate of achievement.

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A global learning community

With the Cambridge Pathway, your child is joining a global community of learners from more than 10 000 schools in over 160 countries.

By developing a global outlook in Cambridge learners, we aim to equip them for success in the fast-changing modern world.

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FIRST LANGUAGE ENGLISH

Paper 0500/11
Reading

Key messages

Candidates did well when they:

- worked through the texts and tasks in the order set
- followed task instructions carefully and based their responses on the correct text and/or section of text
- responded appropriately to the command word(s) in the question
- attempted all parts of all questions
- paid attention to the marks allocated to each question and organised their response time accordingly
- focused on the particular evidence of skills and understanding they needed to demonstrate for each question
- avoided repetition of the same idea within an answer
- did not introduce material/ideas that were not directly related to or rooted in the text
- used their own words where appropriate, avoiding unselective copying and/or lifting from the text
- planned the ideas they were intending to use in longer responses
- checked and edited their responses to correct any unforced errors, incomplete ideas or unclear points.

General comments

Candidates' responses indicated that they were broadly familiar with the format of the Reading paper and the general demands of each of the three questions. There were few instances where whole tasks had not been attempted, though some responses to part questions were incomplete or missing and extended responses were often uneven, limiting the possibility of scoring higher marks. There were some candidates who missed opportunities to target higher marks by offering mechanical and/or limited responses that simply played back sections of text with little modification in the higher tariff questions. Some missed opportunities to evidence their reading skills convincingly by paying insufficient attention to the details of questions as set.

Almost all candidates appeared to find all three Reading texts equally accessible and engaging. There were few examples of significant misreading of explicit ideas across the cohort, though opportunities to evidence understanding of implicit ideas were missed by some as a consequence of less careful reading of detail. There were many excellent responses to all three questions, with candidates often going significantly above and beyond the demands of level 5. It is though important in timed conditions for candidates to ensure that they do not spend too long on one question at the expense of any of the others, and not all remembered this. For example, it was not unusual for the response to **Question 2(d)** (worth a maximum of 15 marks) to be far longer and/or more carefully crafted than the response to **Question 3** (worth up to 25 marks), whilst a few candidates wrote more/as much in their answer to **Question 2(c)** (worth a maximum of 3 marks) as they did in **Question 2(d)**.

In many of the least effective responses, a failure to complete all aspects of a task and/or a loss of focus on the rubric limited the evidence of understanding and skills offered, or resulted in redundant material **–** for example, a few candidates offered choices from paragraphs other than 3 and 7 in the language question **2(d),** or offered explanations of more than one choice in **2(c)**, and so included explanations that could not be credited. Similarly, there were some less well-focused responses from candidates who had scored well in the smaller sub questions but missed opportunities to target marks in other higher tariff tasks. For example, some wrote considerably more than the maximum of 120 words advised for the selective summary **Question 1(f)** or wrote their response to **Question 3** from a different perspective from that specified in the task guidance**.**

Some less effective responses were focused solely on word count at the expense of other aspects of their answer **–** spending time counting individual words and/or writing out a full draft version of their answer to

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Question 1(f) is unlikely to be an efficient use of time in the context of an examination. Candidates are reminded that the word guidance offered in **Question 2(d)** and **Question 3** is not a requirement of the task in itself – the guidance is offered to help them organise their time efficiently and offer sufficient evidence of their skills and understanding to target higher levels. In **Question 1(f)** the task details offer a reminder of the need for concision (Your summary should not be more than 120 words). Responses to **1(f)** that were far longer than that were likely not only to limit their success in that task but also to create unnecessary time pressure during the rest of the examination.

In **Question 1**, candidates scoring highly had worked through the tasks in the order presented and made efficient use of their time, for example by paying attention in **Questions 1 (a)–(e)** to the marks and space available as a helpful indicator of the length and detail they needed to offer in each response. They did not add further unnecessary material and focused on answering each question as set. Most candidates were careful to follow the line or paragraph references in the questions to help them to move down Text A in order and direct their attention, though a number of the least effective responses tried to answer questions based on one part of the text from another and/or by unselective copying. A few candidates had not remembered that in a test of comprehension their responses to these initial short answer questions needed to be derived from Text A in order to evidence their Reading skills and should not be based on their personal opinion, imagination or experience.

Less effective responses attempted to include extra guesses in their responses to **Questions 1(a)–(e)** taking up valuable examination time by doing so and often diluting evidence of understanding. Others simply copied out sections of text with limited modification – often negating any suggestion of understanding by doing so. A number of otherwise more effective candidates offered circular responses in one or more of their responses, repeating some or all of the language of the question where own words were specified as required, and/or addressed only part of the question in their answer. Such responses provided limited evidence of understanding as a consequence and these candidates missed out on marks they might reasonably have been expected to target – for example in **1(b)(i)** by suggesting 'people would go back for the things later'. In **Question 1(f)** some candidates relied heavily on the language of **Text B** and/or copied out chunks of text, limiting the available evidence of their own skills and understanding as a result.

In **Question 2** candidates needed to identify (in **2(a)**) and explain (in **2(b)**) words and phrases from the text, moving towards an explanation of how language was being used by the writer via **Question 2(c)** and on to the language task, **Question 2(d)**. More effective responses were careful to refer back to **Text C** to locate specific relevant choices and consider their meaning in context. In **Question 2(a)** those who copied out longer sections or sentences from the text, rather than identifying precisely the exact word/phrase that matched the sense of the underlined word/phrase in the question, were not providing secure evidence of their understanding. Likewise, opportunities for marks were missed by a few candidates in **Question 2(c)** who did not clearly identify one example from the text in their explanation and/or attempted to offer a generalised overview of the whole extract. To aim for higher levels in **Question 2(d)**, candidates should ensure that they explore and explain the meaning of each of the words they have chosen in some detail before moving on to consider associations and connotations or suggest effects. Most candidates were able to identify three potentially useful examples for analysis in each half of the **2(d)** task and offer a little basic effect / meaning in context, though a number of candidates were not sufficiently clear, careful or detailed in the examination of their choices. In less effective responses, vague and generalised comment and/or labelling of devices without explanation of how these were working in this instance meant opportunities to target higher levels were missed. A number of candidates did not address the **Question 2(d)** task effectively, often repeating rather than explaining the language of the original text and/or identifying few or no clear choices in one or both halves of the question.

In **Question 3** most candidates had recognised the need to respond with the words of a speech and most had at least attempted to include ideas from the text relevant to all three bullets. A few candidates lost sight of the task and/or text – for example, writing their speech from the perspective of the original narrator in the text rather than from her son Charlie's viewpoint, or offering a very general response on the topic of conservation / beaches from their own perspective. Candidates are reminded that responding to the specifics of the task as set will offer them the widest range of opportunities to demonstrate skills at higher levels in any extended Response to Reading question. Responses across the cohort covered the full range of levels of achievement, with top level responses offering responses that used, interpreted and developed a wide range of ideas to address all three bullets equally well, integrating key details from the text. Mid-range responses often missed opportunities as a consequence of uneven focus, a lack of planning beforehand and/or offering a narrow range of ideas from the text overall. Less effective responses either offered only brief reference to the passage, included evidence of misreading and/or repeated sections from the text with limited or no modification. Along with unselective copying, reliance on the language of the text in order to communicate ideas is an indicator of less secure understanding and should be avoided.

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Candidates should remember that though Paper 1 is primarily a test of Reading, 15 of the 80 marks available are for Writing – divided between **Question 1(f)** and **Question 3.** In these two questions, it is important that candidates consider the clarity, organisation and register of their writing. Where meaning becomes unclear due to inaccurate writing this is likely to limit achievement, as will over-reliance on the language of the passages. When responding to **Question 1(f)** and **Question 3,** it is advisable to factor in time to plan and review responses to avoid inconsistencies of style, errors that impede communication of ideas and awkward expression.

Comments on specific questions

Question 1 Comprehension and summary task

Questions 1 (a) – (e)

Short answer **Questions 1(a)–(e)** required candidates to read and respond to **Text A: Treasure hunting.** More effective responses paid attention to the paragraph references and command words in the instructions to demonstrate efficiently the evidence of understanding required. Some mid-range responses missed opportunities to target higher marks, for example through overlong, muddled or unfocused explanations. The least effective responses often repeated the language of the text where own words were required and/or relied on copying longer sections of text with little or no modification to address the question as set.

Effective responses provided evidence that candidates had understood the need to interpret and use details in the text carefully to answer each of the comprehension questions to show what they could do and understand. They followed the order of the sub questions to work through **Text A** from the beginning, picking up on pointers where appropriate to help them to identify relevant material. Occasionally, opportunities to evidence understanding were missed where explanations offered were unclear or partial and/or injudicious selection changed the meaning from that of the original text – candidates are reminded that whilst writing is not assessed in **Questions 1(a) – (e)**, responses do need to be sufficiently precise and clear to communicate details from the text accurately.

(a) **What two things give people the idea to search for treasure, according to paragraph 1?**

In **Question 1(a)**, most candidates picked up on the signposts in the text to recognise that the two things that 'Certainly inspire' people to search for treasure were identified in the second sentence of the paragraph. A few copied out all/part of the first sentence and missed out on a straightforward mark for selection as a result. Some candidates made use of the question stem to help focus their answer, whilst others worked more economically and simply wrote the key words of their answer – either approach was acceptable.

(b) **Using your own words, explain what the text means by:**

(i) **'… to recover later.' (lines 6–7)**

(ii) **'… concealed around the globe.' (line 7).**

In **Question 1(b)** task guidance made it clear that use of own words was required to evidence understanding. Where responses failed to score both marks, it was sometimes the result of offering a partial explanation only, for example in **Question 1(b)(ii)** offering a meaning for 'concealed' and/or 'globe' but repeating rather than explaining any sense of 'around the'. In **1(b)(i)** effective responses often explained 'recover' simply as meaning 'retrieve', 'collect' or 'come back to get. A few misread 'recover', not considering context, and so suggested incorrectly that this referred to 'replacing the outer layer of material around something' or 'feeling better after an illness'. In **1(b)(ii)** effective responses tackled both aspects of the idea, dealing first with concealed (most popularly explained as hidden) and then 'around the globe' (often explained as 'all over the world' or 'in lots of different places on the planet'). A few missed opportunities to score both marks in **1b(ii) –** for example, by guessing 'found', 'discovered' or 'spread' as a meaning for concealed and/or repeating 'around the' without explanation of this key aspect. Effective responses to both parts of **1(b)** were able to evidence that they had securely understood the meaning of both aspects of each question.

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(c) Reread paragraph 3 ('So, how … of the treasure.').

Give <u>two</u> different ways treasure hunters should get the information they need to start their search.

In **Question 1(c)** candidates rereading paragraph 3 closely were able to identify two distinct ways advised in the text; most recognised the explicit advice that this should be done 'By reading' (reference to the example(s) of books and/or old maps could be credited). A few had not read carefully however and so offered 'pay(ing) for information' as a recommendation; this was not in line with the text and where included in an answer indicated that the advice in relation to residents had been misinterpreted.

(d) Reread paragraphs 4 and 5 ('Treasure hunters … work again.'").

(i) Identify <u>two</u> reasons why people who have been inspired to hunt for treasure might not set out straight away.

(ii) Explain why some people might not be persuaded to take up treasure hunting by Alex Rohn's claims.

Candidates who paid attention to command / key words in the question and reviewed the two paragraphs in the light of those were best placed to offer creditworthy responses and make efficient use of their time. Effective responses in **1d(i)** spotted that the reasons delaying people who were inspired to set out on a search were given in paragraph 4 of the text and identified that Alex Rohn's claims were covered in paragraph 5. In **1d(i)** effective responses needed only to identify two of the three reasons given and most were able to do so, though a few responses offered incomplete ideas that did not evidence understanding securely – for example writing one-word responses such as 'information'. In **1d(ii)**, candidates interrogating the text effectively considered both what Alex said and what was said about Alex – with those scoring the maximum 3 marks having recognised the details and implications in the text that casted doubt on Alex's credibility as an expert.

On occasion, candidates offered suggestions in their answer to one part of question **1(d)** that would have been more appropriate to the other – for example, suggesting erroneously in **1d(ii)** that people might not be persuaded by Alex's claims since they needed time to get the information or money for a search. Others missed opportunities as a consequence of less careful reading of the question – for example explaining why people might be persuaded by Alex, rather than why they might **not** be.

(e) Reread paragraph 6 ('If your heart's … equipment.').

<u>Using your own words</u>, explain why now may not be a good time to take up the hobby of treasure hunting.

In **Question 1(e)** the most effective explanations reworked the relevant information from paragraph 6, using their own words as appropriate, to identify three distinct reasons in their explanation. Many identified issues around the cost of the modern equipment required or the difficulties accessing the locations of any remaining treasures. Some made explicit the suggestion that most, or all, of the easy to find treasure would already have been discovered in previous decades by the teams of dedicated hunters, leaving little behind for anyone taking up the hobby now. Occasionally, candidates offered responses suggesting why now would be a good time to take up treasure hunting – citing the existence of advanced technology as a positive – indicating less careful reading of both task and text.

(f) According to Text B, what concerns, worries and objections might there be about the hobby of metal detecting?

You must <u>use continuous writing</u> (not note form) and <u>use your own words</u> as far as possible.

Your summary should not be more than 120 words.

In their responses to **Question 1(f)** most candidates were able to demonstrate at least a general understanding of some relevant ideas from **Text B: Metal detecting** and some understanding of

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the requirements of the selective summary task with relatively few introducing ideas or opinions from outside the text. All points on the mark scheme were covered over the range of responses seen, though repetition of the same idea, misreading and/or inclusion of unnecessary detail meant opportunities were missed by some candidates to target higher marks. A failure to recast information from the passage to address the question sometimes diluted evidence of focus and/or understanding in less effective responses.

Where responses were most effective, candidates had made a consistent attempt to use their own words where appropriate and to keep their explanations concise. Overview was evidenced in some of the most effective responses where relevant ideas had been carefully selected from different parts of the text and organised helpfully for their reader. Less well-focused responses copied from the text, with minimal or no rewording or reorganisation of the original, often resulting in redundancy. Some offered points that argued against any concerns, worries or objections and/or offered advice for anyone considering taking up the pastime; neither of these approaches was in line with the task as set and likely to result in less effective responses as a consequence. Some candidates attempted to rely on lifting whole phrases and/or sentences from the text to communicate ideas, diluting evidence of their skills and understanding as a result and affecting their marks for both reading and writing. Indiscriminate copying of the passage, repetition and adding comment or example should all be avoided as these do not allow candidates to demonstrate their understanding and effectively address the selective summary task.

The most effective responses to the selective summary task showed evidence of candidates having planned a route through the content of their answer before writing their response. Many had produced and followed a bullet point plan, editing out obvious repetitions and efficiently grouping together similar ideas. There were many extremely effective and well-crafted responses that demonstrated both concision and precise understanding over a wide range of relevant ideas. In partially effective responses, excess often arose from attempts to comment on the concerns of others, lists of examples related to the same point and/or repetition of ideas as the result of an unnecessary introduction or conclusion to the response.

Most candidates appeared to be aware of the need to try to use their own vocabulary where feasible – without changing or blurring the original idea – and to organise points helpfully for their reader. However, some candidates overlooked the need for concision in a selective summary task and offered lengthy explanation, with a few candidates continuing to write far more than the maximum of 120 words advised in the task guidance. Others adhered to the advised length of the response but took far too long to explain just a few, sometimes repeated, ideas.

The majority of candidates showed at least some awareness of the need to use only those ideas relevant to answering the question, though not all were able to select ideas efficiently to navigate around more obviously redundant material – for example, some lost focus and spent time detailing the plot of the television programme ‘Detectorists’ and/or highlighting stories of valuable finds reported in the media.

More effective responses were not dependant on the structure or language of **Text B** to communicate their ideas and were consequently able to offer more concise explanations. They remembered to keep in mind the ‘negative’ focus of concerns, worries and objections only and ignored/recast anything appearing in the original text as a comment on, or counter argument to, these. Less effective responses sometimes relied on trying to offer an own words version of the whole text in the order it was presented and often repeated ideas and/or included unnecessary or inappropriate detail as a result. In these responses, excess was often a significant feature. In low to mid-range responses, some candidates simply linked lifted phrases, missing opportunities to target own words and indicate more secure understanding by failing to reword phrases/sections from the text such as ‘digging in public spaces creates trip hazards’ and ‘divorcing those objects from their context and most of the information that makes them valuable’. The least effective responses were almost entirely reliant on the language of the original. Candidates are reminded that lifting sections of text and splicing them together is unlikely to evidence understanding of either the ideas in the passage or requirements of the task.

Advice to candidates on Question 1(f):

- read the task instructions carefully – identify the focus of the question and how it relates to the perspective in the text

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- reread Text B to identify just the ideas that are potentially relevant to the focus of the question
- discard any ideas or extra details which are not relevant to the specific focus of the question
- plan the ideas you are going to include ahead of writing your response – draw a neat line through your planning afterwards
- reflect on the ideas you have highlighted in your plan; check that they are distinct and complete
- check whether there are repeated ideas or examples which could be covered by one 'umbrella' point
- return to the text to 'sense check' any ideas you are unsure of before you try to use them
- organise and sequence your ideas to make them clear to your reader; do not rely on repeating ideas in the order of the original text
- explain ideas in a way that someone who had not read the text themselves would understand
- do not comment on ideas or add examples/details/opinions of your own that are not in the text
- write informatively and accurately in your own words, avoiding errors which affect meaning
- check back to ensure that you have included all of the ideas you planned to but not repeated anything
- though it is not necessary to count every word, you should keep in mind the guidance to write 'no more than 120 words' and aim for concision.

Question 2

(a) **Identify a word or phrase from the text which suggests the same idea as the words underlined:**

(i) **The boys and their mother have to pass through and around the delicate hills of sand to get access to the beach.**

(ii) **The goods carried by the ship that sank were never found, but the people on board were saved.**

(iii) **It is not unusual for the narrator to discover everyday items that have been thrown away without thought on the beach.**

(iv) **Previously, vehicles were allowed on the beach.**

Focused responses to **Question 2(a)** clearly identified the correct word or phrase from **Text C: The beach** to correspond with the meaning of the underlined example in each part – simply and efficiently giving the exact word or phrase only as their answer. Candidates should note that it is **not** necessary to write responses to **Question 2(a)** in full sentences and they need only to offer the word or phrase selected from the text as their answer. Some candidates added unnecessary time pressure by copying out the entire question in each case, substituting the word or phrase from the text and then bracketing or underlining the relevant section of their answer.

Marks were sometimes missed where responses were unfocused – for example, offering responses that covered only part of the meaning of the underlined phrase, or adding in extra words from the text that went beyond the meaning of the underlined words, such as 'cars' in **2(a)(iv**) or 'fragile dunes' in **2(a)(i)**. Occasionally, candidates had overlooked the instruction to 'identify a word or phrase from the text' and tried to offer an explanation of meaning in their own words.

(b) **Using your own words, explain what the writer means by each of the words underlined:**

On this dazzling afternoon, cycling along the sea's edge is exhilarating and our laughter sends seagulls scattering skywards. The new path we're following ends abruptly and we're stranded on the wrong side of a channel of water.

(i) **dazzling**

(ii) **exhilarating**

(iii) **abruptly**

In **Question 2(b),** some responses offered just one carefully chosen word or phrase as their answer, whilst others offered longer explanations as evidence of their understanding. Either approach could be creditworthy, though candidates should be careful not to dilute evidence of understanding by offering several suggestions and extra guesses of different meanings that are

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contradictory and/or not in line with the text. Effective responses had considered the precise meaning in context of each of the words underlined, recognising for example that 'abruptly' suggested a sudden, unexpected end to the path rather than something that ended quickly as less precise responses suggested. A number of candidates were unsure of the meaning of 'exhilarating' – for example, suggesting incorrectly that it meant breathless or exhausting. Some missed the suggestion of very bright sunlight in 'dazzling' and offered only generic adjectives such as wonderful or awesome which were too general to credit.

(c) **Use <u>one</u> example from the text below to explain how the writer suggests her feelings as she attempts to cross the channel of water on her bicycle.**

<u>Use your own words in your explanation.</u>

I show the boys that, like life, if you approach it full on, you can most times power through on sheer determination. But today the channel's deeper than it looks. I've misjudged it massively. My bike comes to a graceless halt midway, balances briefly, then falls flat on its side, depositing me spectacularly in fifty centimetres of water.

In **Question 2(c),** those candidates who had focused clearly on using just **one** example taken from the text extract as instructed were best placed to demonstrate their understanding. Some underlined their chosen example in the text, others copied it out as a subheading for their explanation; either approach was acceptable.

Effective responses included those which began with an explanation of the meaning of the key word(s) in their example, ahead of going on to explain what those meaning(s) suggested about the writer's feelings at that point. Many responses centred their answer around all/part of the image of the writer's belief that 'like life, if you approach it full on, you can most times power through on sheer determination' and were generally able to exploit their chosen example effectively, often suggesting something of the optimism and self-belief it suggested. Some who had selected the whole image still missed opportunities to target higher marks by not explaining how 'power', 'sheer' and/or 'full on' helped to contribute to the sense of commitment to succeed in life. Those who selected 'depositing me spectacularly in fifty centimetres of water' were often able to unpack it particularly effectively and score full marks showing understanding of the drama and amused embarrassment communicated in the choice of vocabulary and implied tone.

The most effective responses had carefully noted the number of marks available and focused their response to make three distinct points in relation to their one chosen example. Less effective responses often attempted to discuss more than one example – time that might have been more profitably spent in **Question 2(d)** where there were up to 15 marks available. Some less effective responses did not pay careful attention to the instruction to select from the given extract and attempted unwisely to paraphrase the whole extract and/or discuss it in very general terms. Others chose less interesting selections from the text (for example, 'the channel's deeper than it looks' or 'But today') that offered little/no opportunity to explore how the writer's feelings were conveyed or chose a potentially useful example but then offered explanations better suited to another. On occasion, opportunities were missed to offer evidence of understanding through circular responses that simply repeated the language of the text or misreading of key words – for example, some candidates attempted to explain the writer's 'sheer determination' as showing how determined she was to power through.

(d) **Reread paragraphs 3 and 7.**

- **Paragraph 3 begins 'From this distance …' and is about the wreck.**
- **Paragraph 7 begins 'Treasure hunting …' and is about the egg cases of fish.**

Explain how the writer uses language to convey meaning and to create effect in these paragraphs. Choose <u>three</u> examples of words or phrases from <u>each</u> paragraph to support your answer. Your choices should include the use of imagery.

Effective responses to **Question 2(d)** offered clear analysis of three relevant selections from each paragraph – six in total – often beginning by explaining the literal meaning of the choice and then moving on to explore effect. Such responses demonstrated understanding of how the writer was using language through detailed discussion of focused choices centred around images, individual

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words or phrases. Where candidates had considered all of the key words in slightly longer choices they were able to avoid those more generalised comments of less effective responses, though candidates do need to be careful to choose and explain examples of interesting or powerful language use precisely and deliberately, rather than simply offer whole sentences from the paragraph with a general comment in the hope there will be something useful in there. Occasionally, some candidates did not indicate any clear choices for explanation, offering instead a general summary of each paragraph that did not address the task and could not be credited.

Some candidates appeared to attempt to adopt a more formal, academic register when writing their response to **2(d)** which was not always helpful to their explanations. The most effective responses simply offered clear explanation of their ideas – often as if explaining orally each quotation to their teacher or fellow learners and avoided repeating the same idea over several choices (finding different words to express it where they felt it was equally relevant).

Some candidates used each of their choices as a sub-heading for their explanation of it effectively, though candidates repeating the language of the text within their explanations missed opportunities to target higher marks. The most effective responses considered words within their choices individually, as well as suggesting how they worked within the longer phrase and/or in the context of the description as a whole. Rather than selecting the first three choices in each half they came across, or the most 'obvious' literary devices, Effective responses often set out to identify those relevant selections that they felt best able to explain. Some of the most effective responses spent some time exploring interesting contrasts between descriptions of essentially the same objects within the paragraph, for example unpicking the two opposing descriptions of 'mermaids' 'purses'. Responses at level 5 frequently analysed their choices precisely and offered responses that were balanced across both parts of the question. In the mid-range, responses were often uneven in favour of one paragraph or the other and opportunities were missed where the same or very similar general suggestion was offered for more than one choice and/or words from choices were recycled in responses rather than explained.

Choices from paragraph 3 often centred around the idea of the wreck appearing to have been deliberately placed on the sand for dramatic effect – many candidates selected choices containing the words 'prop', 'stage' and 'magic' though some relied on repeating other words from the paragraph such as 'unreal', 'thrill' and 'astonishing' in their explanations, diluting evidence of understanding by so doing. A number of candidates had misread the game of hide-and-seek as something the two boys were playing and/or tried to explain sweeping as the movement of a broom (not relevant to this context).

Images connected to the wreck as the carcass of a huge prehistoric creature were popular choices, identified by many, though fewer considered precisely the individual words within the choice– with only the most effective responses explaining precisely how 'picked clean of its flesh by the sea' helped to underline that there was nothing at all left of the external fittings of the ship.

Occasionally, limiting their comments to an explanation of just one word within longer choices meant some candidates offered partially effective explanations only – for example, not all considered the word 'cartoon' in 'clamber on board like marauding cartoon pirates' and so overlooked what it suggested about the writer's interpretation of her boys' behaviour. The least effective responses to **2(d)** offered generic empty comments such as 'The writer has used metaphors and similes to help create a picture in the reader's mind of what it was like to be there'. Comments like these are not helpful to candidates since they do not evidence any understanding of how language is working in a particular given section of the text and can create a false sense of security, meaning candidates move on without saying anything creditworthy. Functional responses to the task offered a clear explanation of the literal meaning of each example they had chosen, whilst more effective responses also identified effect. Candidates working at higher levels were often able to visualise images, using explanation of precise meaning in context and going on to explore connotations and associations as the starting point for their explanation of effect. For example, many were able to explain the unpleasant image of the dried-out egg cases by working outwards from the meanings and associations of 'blackened' and 'hardened', though not all tackled 'desiccated' and some appeared to have misread it as 'dissected'. Less effective responses often only labelled devices and/or offered no more than a generic explanation of the writer's reasons for using them.

In **Question 2(d)**, it is the quality of the analysis when considering how language is being used which attracts marks. Candidates are reminded that their Writing skills are not being assessed in

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this question. They should be encouraged to work at the very edges of their vocabulary range as they explore and explain each choice – reaching to find the right words to help explain their choice, rather than limiting their answer to those words they are sure they can spell correctly, could be helpful for some candidates. Likewise consideration of shades of meaning might help some candidates to improve the precision of their explanations and move towards effect, targeting higher marks – for example, in paragraph 3 the description of the wreck as 'enormous' did more than suggest it was merely 'big' and in paragraph 7 the use of the word 'tiny' to describe the fish went further than suggesting it was just 'small'.

Selections in **Question 2(d)** need to be clear, accurate and deliberate, helping to focus the analysis which follows. Long quotations with only the first and last words identified are unlikely to be useful and/or result in very thin general comments at best. Opportunities this session were missed in a few responses where choices were from one paragraph only and/or only three choices were offered overall. The most effective responses were often able to 'talk their reader through' their understanding of words within relevant choices, considering different possibilities of meaning, associations and connotations, ahead of arriving at an understanding of how and why these particular words might have been used by the writer in this context.

Advice to candidates on Question 2:

- do not copy out lines or chunks of text, miss out key words or include only part of the choice
- copy words and choices correctly from the text
- in each part of **2(a)** make sure that your selection from Text C is clearly identified and matches the sense of just the underlined words in the question
- in **2(b)** be careful that your explanation is consistent with how the word is used in context (if unsure, try substituting your answer in the text to check it)
- in **2(c)** try to say three separate things about your one chosen example
- in **2(d)**, choose 3 examples from each of the two specified paragraphs (6 choices in total)
- only offer an overview in **2(d)** if you have spotted that there is a relevant connection between your chosen choices in a paragraph
- where you are trying to explain meaning, read your answer back to check that your explanation makes sense
- when explaining how language is working avoid empty comments such as 'the writer uses personification to interest the reader' – you need to say how your chosen example does this to show your understanding
- make sure your explanations deal with each of the key words within an identified choice separately as well as how they work together
- when you are unsure how to explain the effect, start by explaining the precise meaning in context of the word(s) in the choice and work from there
- when you are trying to explore and explain images, consider the connotations and associations of the words within choices to help you to suggest the effect the writer might have wanted to create
- allow time to edit your responses – for example, to add in further detail and/or correct errors to help show you have read carefully and understood.

Question 3

You are Charlie. Years later you work for an organisation which protects natural environments. As part of your work, you give a speech to persuade young people to protect your local area.

In your speech you:

- **describe how you spent your afternoons on the beach as a young boy and what you enjoyed best about those activities looking back**
- **explain what you learned from your mother about the beach, its history and its people**
- **suggest how and why you were inspired to protect natural environments and what you think young people can do to help this beach.**

Write the words of the speech.

Having worked through **Question 2** and already familiarised themselves with **Text C**, candidates following the order of tasks as set were best placed to adopt the perspective of Charlie, one of the narrator's sons, and reflect back on the explicit and implicit ideas conveyed in the passage in this extended Response to Reading

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task. The task guidance invited candidates to present a speech persuading young people to protect the local area.

Generally, candidates seemed familiar with the requirements of a speech and many were able to write persuasively, using an appropriate register for their imagined audience. The best responses used and extended the speaker's experience to connect with young people, blending personal memory with a call to action. Occasionally, candidates allowed rhetoric to take over and lost sight of the text and task, developing passionate arguments for blue whales, dolphins and turtles and inventing detailed accounts of ways to reduce carbon footprints that strayed too far from the passage to evidence reading skills.

Some candidates invented complicated backstories for why Charlie had been inspired to protect natural environments that were not rooted in the text, for example suggesting the death of his mother through illness and/or sale of treasure discovered in the shipwreck as reasons for wanting to help the world/reduce global warming. A few candidates missed the opportunity to offer and develop a range of key ideas appropriately by opting to write their speech as Charlie's mother and limited the development they were able to offer as a result.

Most candidates were able to demonstrate that they had understood both the narrative and task in at least general terms. Most were able to recount how Charlie had spent his afternoons on the beach as a young boy citing bicycle rides, treasure hunting for natural and man-made objects and playing pirates with his brother, though a number missed opportunities to develop ideas by not reflecting on those experiences as bullet one invited them to do. More effective responses found natural links when developing ideas for bullet one to ideas relevant to bullets two and three and were often able to use those connections to shape their speech effectively. For example, some reflecting on the most enjoyable moments looking back cited the comic timing of his mother's fall into the channel and went on to reflect on her optimism and enthusiasm as inspiring their own determination and approach to life. Others recalled the vulnerability of the baby skate they discovered together and linked that to the fragility of the dunes they purposefully cycled around rather than over and/or the beauty of nature before moving to explain the change in rules concerning cars on the beach.

Some in the mid-range moved on too quickly in bullet one and/or two to make full use of the ideas they had identified and target higher marks, for example many mentioned finding the shipwreck and car though did not reflect or comment on either experience. More effective responses had often considered what one or both of these might suggest about the power of nature and/or weaknesses of humankind and often went on to link to relevant points about tides/weather or the 'physical culture' of generations before them that the beach concealed and might reveal.

Where candidates had planned their response beforehand, they were often able to draw on relevant ideas and details from different parts of the text to address all three bullets effectively. There were some particularly effective responses that showed thorough evaluation of the text and expertly weaved in detail to produce a convincing and persuasive speech. Meanwhile responses that simply relied on mechanically tracking back through the text and replaying the passage often offered a more limited range of ideas overall, missing opportunities to evidence understanding of implicit ideas and suggestions. The least effective responses copied sections of text with minimal modification and/or included inaccuracies as a result of misreading of key details and information. For example, some reading less closely thought hide-and-seek was a game played by the two boys and/or suggested that the brothers had discovered actual fossilised remains of a large extinct animal on the beach. Some very general responses recognised the need to refer to the beach but had moved away from evidence in the text completely – for example to suggest that Charlie remembered playing on the beach with groups of friends, making sandcastles and/or surfing – none of which were referenced in, or suggested by, the text so could not be credited as evidence of close reading skills.

Where candidates copied sections of text and/or replayed phrases that were not securely understood, responses were generally less effective; expression often became awkward and/or there were inconsistencies of style that also affected the writing mark. Candidates are advised to leave sufficient time to read back through their response to correct any mistakes or inconsistencies in their use of language – for example to ensure that meaning is clear and that the register sounds consistently appropriate. In the least effective responses, lifting in relation to all three bullets was an issue, with copying of whole sections of text not uncommon in these responses. This affected evidence of both Reading and Writing skills.

Advice to candidates on Question 3:

- remember to base your answer on the ideas and details you find in Text C
- keep the audience and purpose for your response in mind throughout your answer

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- do not invent information and details beyond the scope of the passage; look for the clues and evidence in the text to help you make judgements about characters and situations
- give equal attention to each of the three bullet points: the bullet points are designed to help you to identify a wide range of relevant ideas
- plan a route through your answer beforehand: you can choose not to follow the order of the bullet points and /or link ideas from each
- do not copy directly from the text: use your own words as far as you can to express ideas
- try to do more than just repeat details of what happened: developing ideas allows you to better show your understanding, for example by explaining feelings or commenting from the point of view of the character you are writing as
- leave sufficient time to edit and correct your response.

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FIRST LANGUAGE ENGLISH

Paper 0500/12
Reading

Key messages

Candidates did well when they:

- read the introductions to each text carefully
- followed question instructions carefully, responding appropriately to the command words
- considered the marks allocated to each question and developed their responses accordingly
- understood the different requirements of the extended response questions
- paid attention to the guidance offered to help them focus their responses – for example, writing no more than 120 words in the summary, using just one example from the given text extract in **2(c)**, and selecting three language examples from each paragraph in **2(d)**
- avoided unselective copying and/or lifting from the text where appropriate
- used their own words where specified in the question
- planned the ideas to be used and the route through extended responses before writing
- selected only the material that was most appropriate for the response to the question
- avoided repetition of ideas in all questions
- checked and edited their responses to correct any careless errors, incomplete ideas, or unclear points.

General comments

The vast majority of candidates attempted every question on the reading paper; examiners reported seeing very few incomplete papers. Candidates' responses indicated familiarity with the format and question types on the paper. The texts proved to be accessible to nearly all candidates, and they responded positively to both texts and questions. There were relatively few examples of misunderstanding in terms of task requirements, and time-management was generally effective. Occasionally a failure to follow the rubric, or complete a task fully, limited opportunities to demonstrate understanding. This was most common in **Question 1(d)(ii)** and **1(e)** where some candidates did not attempt to find three points, in **Question 1(f)** where some candidates included a limited range of ideas in their responses or ignored the 120–word guidance, in **Question 2(c)** where a number of candidates did not select a clear example from the text provided or selected more than one, or in **Question 2(d)** where some candidates offered three choices of language in total rather than three choices from each paragraph as specified in the task or focused on the wrong paragraphs in the text.

In **Question 1**, the most effective approach taken by candidates was to work through the questions in the order presented, carefully noting the number of marks allocated and the space provided for their responses as helpful indicators of how detailed their responses needed to be. They also referred carefully to the lines or paragraph specified in each question moving efficiently through the text as directed. Less effective responses to **Question 1** tended to lack focus on the text or lacked relevance to the question. At times candidates used the language of the text where they had been asked to use own words – for example **in Question 1(b)(ii)** by explaining 'conventional' but lifting the word 'options' instead of offering an alternative to show understanding of the whole phrase. In **Question 1b(i)** many candidates found it difficult to fully explain **'**sample delicacies' offering vague explanations such as 'food' or 'dishes' for delicacies and therefore not showing sufficient understanding to be given both of the marks available. This was sometimes an issue in **Question 1(f)** where some candidates copied phrases (or whole chunks of text) rather than remodelling the language of the text in their response. Even where copying is selective, it should be avoided in **Question 1(f)** to demonstrate evidence of full understanding for the Reading mark and produce an effective response to the task. Many candidates also included too many examples and details from the text, such as references to 'Chris' or the complete list of the advantages offered in a school minibus converted into a home. This made copying the original wording of the text more tempting and often led to the inclusion of excess material or sometimes indiscriminate selection of ideas.

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In **Question 2** candidates were required to explain carefully selected words or phrases from specified sections of the text. **Question 2(c)** supplied a short section of the text to select from ahead of the longer response selecting from two paragraphs in **Question 2(d)**. More effective responses were able to consider meanings in context and as well as the effects of the powerful language identified, demonstrating understanding of the writer's purpose in a clear overview of the featured paragraphs. Middle-range responses tended to focus on the meanings of the language choices showing mostly clear understanding, although at times they tended to be literal rather than considered within the context of the whole text. Less effective responses struggled to develop viable explanations sometimes repeating the language of the text in the explanations or identifying literary techniques with varying degrees of accuracy but then offering general comments about the techniques rather than focusing on the words themselves. These responses did not always choose appropriate language to discuss or only selected three examples in total.

In **Question 3** the majority of responses addressed all three bullets in the question, although some candidates found it challenging to develop the ideas from the text. Most candidates wrote as Vic, although some adopted a rather vague voice, referring to Vic in the response rather than using his voice and perspective. The most effective responses produced a convincing letter adopting an appropriate voice for Vic reflecting on his experiences during the trip in the bus as well reflecting on what he had learnt from the experience. More effective responses developed the ideas and details in the text selectively to work through the bullets logically. They were able to explain what preparations were done before starting the trip, outline all the challenges faced and how they were managed, as well as reflecting on lessons learnt for the future. Responses in the middle range tended to use the text rather mechanically often paraphrasing closely rather than selecting ideas and details to use in their own writing to demonstrate understanding. These responses tended to focus on the first part of each bullet point, thus losing opportunities to develop the ideas in the text through offering more developed explanations and advice. Less effective responses tended to lack focus on the text covering only the main ideas and sometimes inventing material that moved too far away from the text itself. Some responses included a great deal of fabricated material about how Vic became part of the group, often reminiscing about fictional past events and trips with Roger. Other less effective responses copied unselectively thus providing little evidence of understanding.

Paper 1 is primarily an assessment of Reading, however 15 of the 80 marks available are for Writing – 5 marks in **Question 1(f)** and 10 marks in **Question 3**. In these questions, candidates need to pay attention to the quality and accuracy of their writing to maximise their achievement. Candidates are advised to plan and review their responses to avoid inconsistencies of style and to correct errors that may impede communication.

Comments on specific questions

Question 1

Questions 1(a) – (e)

In response to Text A candidates were asked to response a series of short answer questions. More effective responses paid careful attention to the command words in the instructions as well as the number of marks allocated to individual questions. These responses demonstrated sound understanding by selecting appropriate details and evidence from the text in concise, focused responses. Less effective responses tended to write too much or failed to follow the instruction to use own words. Some candidates offered several possible responses thus using time inefficiently and diluting evidence of understanding.

(a) What were the first food trucks called, according to the text?

This question required candidates to be selective and focus on paragraph 1 only. Most candidates identified and 'chuckwagons' to get 1 mark. Occasionally the mark was not awarded because of too much excess information from the text.

(b) Using your own words, explain what the text means by:

(i) 'sample delicacies' (line 2)

(ii) 'conventional options' (line 3).

In **Question 1(b)** candidates were instructed to use their own words to evidence understanding of the phrases in the question. Where responses failed to achieve both marks available for each

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phrase, it was usually due to the candidate's partial use of the words from the text. For example, in **Question 1(b)(ii)** a few candidates used the word 'options' in their explanation of 'conventional' (such as 'the usual options' thus partially addressing the task. Some offered vague words to explain 'delicacies' such as 'food' or 'dishes' which did not explain the meaning in context clearly enough. Candidates should be aware that the 2-marks offered for each sub-section of **Question 1(b)** require all parts of the phrase to be explained clearly and precisely in the context of the text.

(c) Reread paragraph 2 ('Unlike modern ... journalists.').

Give <u>two</u> differences between modern food trucks and chuckwagons.

To achieve both marks for this question candidates were required to offer two clear differences between modern food trucks and chuckwagons, but many candidates simply offered two characteristics of chuckwagons *or* modern food trucks with no element of comparison. Some candidates wrote a characteristic of chuckwagons on one line and an opposing characteristic of modern food trucks on another line and therefore could be credited with 1 of the 2 marks available. The most effective responses clearly identified two differences such as 'Unlike modern food trucks, chuckwagons sold items other than food and drink', or 'Modern food trucks just have chefs but a person running a chuckwagon would have many other roles'.

(d) (i) Reread paragraphs 3 ('The modern ... parked.').

Identify <u>two</u> reasons why food trucks are becoming more popular with customers.

To respond to **Question 1(d)(i)** candidates needed to focus on what customers like about food trucks. Many candidates did not read the question carefully enough and offered general benefits of food trucks without focusing on the customer. They often offered material more suitable for **Question 2d(ii)**. Where candidates had read the question carefully, they were usually able to identify two reasons for their popularity with customers and gain both marks available. The most common response was due to nostalgia, followed closely by innovation and technology. Some candidates identified that street food has become more fashionable, but others were too vague and did not include street food in the point. Fewer candidates offered the idea that they can be found easily by customers.

(ii) Reread paragraphs 3 ('The modern ... parked.').

Explain why many business people prefer operating mobile food trucks to running restaurants in permanent locations.

In **Question 1(d)(ii)** candidates also sometimes failed to read the question carefully enough and focused on the customer instead of the business owner. This was more common where **Question 1d(i)** had also not been read carefully. Most candidates were able to explain that running a food truck is cheaper than having a permanent restaurant and many candidates referred to the ability to perfect a limited number of menu items. Some candidates identified the potential to serve food at a range of large events, but some were too vague on this point, simply offering a basic meaning of mobile as being able to move around rather than explaining why this is an advantage for the business owner.

(e) Reread paragraph 4 ('Successful food ... ready!').

<u>Using your own words</u>, explain why it might be challenging to establish a unique food truck business nowadays.

This question required candidates to show both explicit and implicit understanding from their reading of paragraph 4. Most candidates were able to achieve one mark, a reasonable number gained two marks, but fewer gained all three. The most common correct idea was that converting a food truck can be expensive, followed by the idea that all of the potential food options have been covered already. The point in the mark scheme explained clearly by fewer candidates was that the number of unusual or gimmicky vehicles/concepts already on the market, makes it challenging to find something original. Many simply repeated that there are many unusual ideas out there without clearly identifying it as a challenge. Some candidates simply repeated the question claiming it was challenging to establish a unique food truck. Candidates should be aware that to gain the full 3

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marks in this question at least some remodification of the ideas in the text is necessary. There were very few examples of candidates copying out the paragraph completely in this session.

(f) According to Text B, how and why are old buses being used?

You must use continuous writing (not note form) and use your own words as far as possible.

Your summary should not be more than 120 words.

This question was based on Text B and required candidates to select relevant ideas from the text and organise them into a focused summary which addressed the task. Most candidates were able to demonstrate at least a general understanding of the text and offer some relevant ideas about how and why old buses are being used. The most effective responses were carefully planned, organised and coherent, focusing sharply on the task by referring to a wide range of ideas from the text, reordering the material where necessary to aid fluency and achieve logical progression, avoiding repetition and re-modelling the wording of the text to use own words effectively. These responses were often preceded by a bullet-pointed plan in which ideas from the text were noted briefly before being included in a fluent own-words response. Responses in the middle range tended to include a more limited range of relevant ideas, the most common being helping the homeless, using them as libraries, theatres and museums, converting minibuses to homes, advertising, and creating a pop-up shop or a café/office. A number of candidates failed to spot similar ideas such as helping the homeless and running musical events for elderly people with dementia as both aiding the community, or recycling buses being environmentally friendly and converting minibuses into homes reducing the carbon foodprint, which could have been summarized into one environmentally friendly idea. This led to repetition. There was often inclusion of excess material even where an effective range of ideas had been considered, particularly when including both community ideas with full details or outlining all the living spaces offered in a converted minibus as well as citing that it can be used as a holiday home. Some less effective responses closely paraphrased the whole text resulting in repetition as outlined above but also the inclusion of irrelevant ideas and details.

Length was often an indicator of the level of the response, with some responses being too short due to a small number of relevant ideas identified, and others very long and wordy due to unnecessary information or quotations to exemplify comments. The most effective responses tended to adhere to the advised length through adopting a concise and focused approach to the task while adapting the style to produce a plain, informative text. Less effective responses were either very brief due to a very limited number of ideas being considered or were excessively long and unselective. Occasionally less effective responses adhered to the advised word count but took far too long to consider a few ideas by including unnecessary details and/or comments. In most responses there was an attempt to use their own words although a surprisingly large number of candidates did rely on lifting phrases from the text. The most commonly lifted sections of text/phrases were, 'they can't be buses forever', 'bringing arts to communities via mobile libraries, theatres or museums', 'educate, raise awareness and maybe save a life or two along the way', 'stopping in zones where homeless people tend to gather, 'musical events for elderly people suffering memory loss', 'working together can make a difference', 'renovated to accommodate four adults, complete with cooking facilities and a bathroom','3D-paint your advertisement all over their vintage vehicle and drive it around', and 'bus that's been transformed into an office and café'.

Many responses strung together these lifted phrases, so were at best partially effective due to the reliance on the wording of the text affecting the evidence of reading understanding. These responses often lacked a helpful structure as the ideas had not been reorganised to address the task. There was very little evidence of misreading in this task (although many thought that elderly people with dementia were enjoying a 1970s disco on a bus), but an issue in some responses was a tendency to include repetition of a number of points when trying to address the 'how and why' in the question.

Advice to candidates on Question 1(f):

- reread Text B after reading the question to identify potentially relevant ideas
- plan the response using brief notes to ensure a wide range of ideas from the text is selected
- avoid including unnecessary details which do not address the question
- organise the ideas, grouping them where relevant, to ensure that your response is coherent

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- avoid repeating ideas
- avoid including a general introduction or summative conclusion
- use your plan rather than the text as you write your response to avoid lifting
- write clearly and make sure you express yourself fluently using your own words – avoid lifting phrases
- do not quote from the text
- do not add comments or your own views – use a neutral writing style
- try to keep to the guidance to 'write no more than 120 words'.

Question 2

(a) Identify a word or phrase from the text which suggests the same idea as the words underlined:

(i) Any interested person watching might notice that this large bus was different from the buses they sometimes saw in their country.

(ii) The bus company was still really helpful after the bus had been sold.

(iii) The disastrous end to their journey was when the bus ended up in a river.

(iv) The writer and their fellow travellers showed incredible immaturity to think that they could make such a journey without mishap.

The most effective responses to **Question 2(a)** focused on the underlined word or phrase, located the correct version in the text and gave it as the response. A few responses copied the whole sentence from the question inserting the correct phrase from the text to replace the underlined phrase in the question, but this was a less common approach presumably because it wastes valuable time for the candidates. Responses that used the text more widely than in the equivalent phrase/sentence could not be rewarded even if the correct word/phrase was included, as candidates do need to exercise precision to demonstrate full understanding. Most candidates were familiar with the demands of this question, but a few seemed confused about how to respond, offering own words equivalents of the underlined words instead of locating them in the text. Where marks were lost, it was usually due to partially matching the underlined phrase, for example 'breath-taking naivety' (missing the 'displayed' for 'showed', or more commonly including too much of the text and therefore moving beyond the meaning of just the underlined phrase, for example 'a curious spectator would see a bus', or 'until that fateful last day when it sank'.

(b) Using your own words, explain what the writer means by each of the words underlined:

It's difficult to envisage how cut off from our previous lives we were back then. Mobile phones and emails weren't yet invented. There was no internet linking different countries and cultures. To phone home was expensive and public phones weren't easy to find. I was away two years and managed to phone home twice.

(i) envisage

(ii) linking

(iii) expensive

In **Question 2(b)** the most effective responses covered the meaning of each word considering its context as used in the text. Many candidates were able to explain 'envisage' as 'imagine', but some candidates simply wrote 'think' which did not show full understanding. 'Linking' was usually effectively explained as 'connecting', and most candidates were easily able to explain 'expensive' as 'costly'. These responses to **Question 2(b)** thought carefully about meanings in context and offered viable responses which would accurately replace the words in the text without altering the meaning. Some candidates seem to be under the impression that their explanations should only be a single word to replace the original which is not the case.

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(c) **Use <u>one</u> example from the text below to explain how the writer suggests the attitude of the owner of the orange juice.**

<u>Use your own words in your explanation</u>.

This is the story of that big, red double-decker bus. This isn't a children's story, and if you try reading it to children, they'll soon lose interest in the increasingly petty details of our daily life. In one early letter to my parents, I wrote: 'We had yet another meeting yesterday to sort out grievances.' This latest inquest had been into who'd drunk someone's orange juice from the fridge. The devastated owner knew some had been 'stolen' because he'd marked the level of the liquid in the bottle.

In **Question 2(c)** candidates were required to select one example of language from the specified section of the text and explain how it suggested the attitude of the owner of the orange juice. A significant number of candidates did not follow these instructions but instead offered a very general response with no focus on the writer's language and no language choice selected. Where a paraphrased version of a language choice was offered, it was occasionally possible to credit an explanation if they lifted a word such as 'petty', but they often lacked any focus on any specific words used by the writer and therefore could not be credited at all. The most effective responses offered a concise quotation then considered how the writer was able to convey the attitude of the owner of the orange juice. The most popular example was 'The devastated owner knew some had been 'stolen' and many responses explored the overly dramatic reaction suggested in 'devastated' recognising that the owner was acting as if heartbroken, as well as the use of 'stolen' suggesting that a trivial annoyance was being viewed as a serious crime. These responses often cited the immaturity of the orange juice owner.

Some responses, however, tried to explain 'devasted' with less powerful words such as 'sad' or 'upset' thus limiting the opportunities to tackle the exaggerated language effectively. Some responses explored 'this latest inquest into who'd drunk someone's orange juice' focusing on the phrase 'latest inquest' as suggesting that it was a regular occurrence which merited a formal investigation like a serious crime thus emphasising the owner's possessiveness and overblown sensitivity.

Other candidates focused on 'he'd marked the level of liquid in the bottle' and were able to explain the calculated trapping of the 'thief' revealing the stinginess and possessiveness of the orange juice owner. Some candidates failed to focus on the question selecting choices such as This is the story of that big, red double-decker bus', or 'This isn't a children's story' which were not related to the attitude of the orange juice owner. Only one example could be rewarded so offering more was a waste of valuable examination time that could have been spent on **Question 2(d)** where more developed responses are expected. A number of responses simply paraphrased the whole paragraph without selecting a language choice at all.

(d) **Reread paragraphs 5 and 6.**

- **Paragraph 5 begins 'Our world ...' and describes the inside of the bus.**
- **Paragraph 6 begins 'That bus ...' and describes where, when and how the bus travelled.**

Explain how the writer uses language to convey meaning and to create effect in these paragraphs. Choose <u>three</u> examples of words or phrases from <u>each</u> paragraph to support your answer. Your choices should include the use of imagery.

The most effective responses to **Question 2(d)** offered clear analysis of three appropriate language choices from each of the two paragraphs indicated in the question. The most effective approach was to consider the meanings of carefully chosen phrases in the context of the text and then consider connotations, effects and impacts created by the writer's language choices. These responses often offered a clear overview of the writer's intentions in each paragraph. Less effective responses were sometimes written in note form and offered less developed analysis or repeated the same ideas about effects, often making generalised assertions rather than considering specific words more closely. Middle range responses were usually more effective when explaining meanings but struggled to explore the effects fully, and the least effective responses tended to offer

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quotations (sometimes unselectively) but struggled to find anything relevant to say about them. Some candidates chose three language choices in total rather than three from each paragraph as clearly stated in the question leading to some underdeveloped responses. Some candidates chose inappropriate language choices – sometimes plain language offering limited opportunities.

The most effective responses selected phrases but also considered the individual words within them suggesting how they worked within the context of the whole language choice. Rather than identifying literary devices they engaged fully with the language, considering its impact and connotations fully and linking each choice to a coherent and developed consideration of the paragraph. In paragraph 5 many were able to explore their individual choices within the context of the unusual and cramped conditions on the bus. They considered the importance of the bus to the occupants as a temporary home through 'our world was inside that double-decker bus', often linking it to the overcrowded conditions suggested by 'an overloaded display case of rattling glass and metal on wheels', many also using this language choice to explore the poor condition of the bus, as well as the idea that the occupants were also on 'display' and attracting attention wherever they went. Many candidates also chose to explore Vic's formidable and unbelievable skills as a carpenter suggested by 'magicking snug bunk beds', or the phrase 'ingenious storage seats' citing his use of limited space to create functional and effective furniture. This was often linked to 'no sliver of space escaped' as further demonstrating that every inch of space on the bus had been utilised efficiently by Vic's designs. These choices could all be linked to an overview effectively yet considered independently offering candidates a great deal of scope for precise and developed analysis of the language used in paragraph 6.

In paragraph 6 many responses were able to appreciate the challenges posed by driving the enormous bus on such a long journey across varying and challenging terrains. Many candidates opted to discuss 'traversed deserts and climbed mountains' as evidence of the variation in landscapes and the adventurous nature of the journey. Another popular choice was 'rumbling across continents' as evidence of the great distances covered by the bus and its sturdy reliability suggested in the 'rumbling' of the engine. This was often linked closely to 'threatened to halt its determined march' and the impression of a bus that refuses to give up, no matter what, with military endurance and formidable strength. Many candidates focused on difficulties of driving the bus suggested in 'heavy, awkward vehicle' and linked this to 'less manoeuvrable than a whale in quicksand' implying that the bus is out of its natural environment and extremely difficult to control in some terrains. Many also appreciated the humour suggested in the image.

Where effects were less effectively explained, it tended to be due to repeating the same idea for all three language choices in the paragraph. In paragraph 5 this tended to be through repeating the idea of the lack of space and in paragraph 13 it tended to be repeating the idea of the bus being hard to control/drive. There were also candidates who used the language of the text repeatedly in their explanations: most commonly 'world', 'rattling glass and metal on wheels', 'stared and gazed', 'squeezing', 'magic, 'secretly', 'continents', 'lumps, bumps and obstacles', 'determined', 'march', 'a whale in quicksand' and 'fateful last day'.

There some evidence of misreading in the two paragraphs specified in the question: some candidates interpreted 'gutted' too literally and focused on the bus being permanently harmed or completely destroyed by a deliberate violent action; other candidates misread 'overloaded display case of rattling glass' and thought that the bus was full of glass items which were not properly secured; and a number of candidates misread 'sliver' as 'silver' which affected the candidate's interpretation of the whole phrase as they focused on how precious the space was. Some less effective responses also included very long quotations with general explanations rather than engaging closely with specific words. Very rarely were quotations included at all with a brief description of the paragraphs offered instead. Such responses did not address the question at all. In a very small number of responses, the wrong paragraphs were used so no choices could be credited, or candidates moved through every paragraph in the text, wasting valuable time: candidates are advised to look at the section of text supplied in the question as well as the paragraph number to ensure that they select language choices from the correct paragraphs. They should also be aware of where paragraphs end, especially where there is a page break.

Candidates are reminded that it is the quality of their language analysis which can be credited. Listing of literary devices or the selection of plain language from the text is unlikely to lead to an effective response.

Advice to candidates on Question 2:

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- select three precise and accurate language choices from both specified paragraphs
- make sure explanations of meanings make sense within the context of the text – avoid literal meanings unless this is the case
- avoid very general explanations such as 'this helps the reader imagine it' or 'this creates a strong visual image for the reader' or 'this is an example of powerful language and imagery'
- try to engage with the language at word level by considering meaning in context then connotations / associations of words and why the writer has selected them
- always start with the contextualised meaning then move on to the effect created by the language in terms of how it helps the reader's understanding of the situation, characters, atmosphere, for example
- avoid repeating the same explanations of effects for each language choice: try to be more specific about analysing at word-level.

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Question 3

You are Vic. Shortly after the whole trip ends, you write a letter to a friend telling them about your experience.

In the letter you should:

- **describe the preparations for the trip and how you came to be involved**
- **outline the different challenges faced once the journey began and how these were resolved**
- **explain what you think everyone learned through the experience and looking back what you all should have done differently and why.**

Write the words of the letter.

Base your letter on what you have read in Text C, but be careful to use your own words. Address each of the three bullets.

Write about 250 to 350 words.

This question required candidates to write a letter from Vic (the skilled carpenter) to a friend describing and reflecting on his experience of the two-year adventure on the double-decker bus. The three bullet points in the question offered guidance to candidates to help them identify relevant ideas for their letter. The first and second bullets required candidates to retrieve relevant information from the text and adapt it to fit the requirements of a letter written from Vic's perspective. The third bullet required candidates to infer what Vic feels he has learned from the experience as well as considering what he wishes they had done differently.

The majority of candidates were able to show general understanding of the text addressing the task by using some of the main ideas in the text to support the response. Many of the responses were also able to develop the ideas by writing in a credible style for a letter to a friend, evaluating the ideas in the text and adapting them accordingly. Where candidates had followed the bullets carefully, they were often able to develop explicit and implicit ideas effectively to write a lively and amusing letter which captured the absurdity of the journey as well as the highs and lows experienced by the occupants of the bus. Most candidates addressed the bullet points in chronological order using them to structure the response coherently. Less effective responses tended to be unselective or closely paraphrase the text without adapting the style therefore offering a rather plain narrative account of the bus journey with little sense of Vic's perspective of the events. The least effective responses used the ideas in the text thinly, often offering very general ideas about in response to the first bullet mostly connected to acquiring the bus, listing some of the more obvious challenges for the second bullet, and offering an undeveloped response to the third bullet mostly citing the need to take more money for fuel without offering any further details or trying to develop the ideas in any way. Some less effective responses only addressed one or two of the bullets.

The first bullet of the question invited candidates to describe the preparations for the journey and how Vic came to be involved. This gave candidates opportunities to look at the acquisition of the bus by Roger, the advert he placed to travel around the world, the need to refurbish the interior requiring Vic's carpentry skills and his subsequent alterations. The best responses considered the forming of the group through an advert, the old age and impractical height of the bus, the decision to paint it red, and the sterling work Vic did in a confined space to make it comfortable for the group. Less effective responses usually found a narrow range of ideas in this bullet and did not look for ways to develop the ideas. There was little evidence of misreading in response to the first bullet, although a large number of candidates thought Roger and Vic were old friends ignoring the reference to 'Roger's new friend, Vic' in the text. Some candidates spent time creating a back story for Vic and Roger which had no connection to the ideas in the text at all.

The second bullet offered many opportunities to identify the challenges of life on the bus and how the group resolved them. The best responses selected carefully and were able to remodel the material. They were able to look at the implication of silly arguments suggested by the 'theft' of the orange juice and link it to the limited space on board creating tension. They were also able to develop the suggestion of financial woes by referring to the boredom or physical difficulty of the 'manual work' they were forced to do. They also cited a feeling of isolation or home sickness created by the lack of ways to communicate with family and friends at home in an era before the creation of digital communication. Many candidates also considered the problems caused by the bus itself, citing its age creating mechanical issues, as well as its size making it very tricky to drive in some landscapes and conditions.

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When responding to the third bullet, the most effective responses clearly organised the material into the positives of the adventurous journey and the shared experiences they had but weighing it against the foolishness of their lack of preparation due to their relative naivety. These responses picked out a range of clues from throughout the text to develop appropriate ideas, reflecting on the experience of different cultures, and their personal growth as they learnt to work together to overcome adversities. The best responses took a reflective approach and considered their lack of preparation in terms of finances, as well as the impracticality of the vehicle for the nature of the journey undertaken and their stupidity in attempting to float it across a river on a raft. Less effective responses tended to lack range in response to this bullet often simply referring to their lack of money and some misread the ending completely and thought that the bus made it safely across to continue to journey. Some responses did not address this bullet at all.

Many candidates seemed comfortable and familiar with the format of an informal letter to a friend with the best responses adopting an appropriately lively and entertaining tone and register. Middle-range responses tended to be written as a rather plain narrative relying heavily on the sequencing of the original text and sometimes were not written as Vic. The language used was mostly appropriate and some more effective responses were genuinely convincing. In less effective responses the language and voice were very plain but rarely inappropriate for the genre, although such pieces tended to lack a sense of purpose or audience. Some less effective responses wrote a completely fictional piece about a journey on a bus with other friends or family rather than using the text.

Generally, accuracy was effective with some skilfully written responses. Others struggled to maintain fluency resulting in some awkward expression caused by errors in grammar and punctuation. Candidates are advised to check through their work carefully to correct errors where possible. There were few instances of wholesale lifting from the passage, but some less effective responses were over-reliant on lifted phrases and sentences throughout the response.

Advice to candidates on Question 3:

- read Text C carefully, more than once, to ensure sound understanding
- do not refer to ideas in Texts B and C
- pay careful attention to the written style adopted – for example, the register required for the purpose and audience of the task
- do not invent information and material that is not clearly linked to the details and events in the text
- give equal attention to all three bullet points
- briefly plan your response to ensure that you are selecting ideas relevant to all three bullets
- remember to look for ideas throughout the text for the third bullet
- avoid copying from the text: use your own words as far as possible
- remember to use ideas and details from the text but to adapt and develop them appropriately to create a convincing voice and new perspective
- leave some time to check through your response
- do not waste time counting the words: the suggested word length is a guide, not a limit.

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FIRST LANGUAGE ENGLISH

Paper 0500/13
Reading

Key messages

Candidates did well when they:

- attempted all parts of all three questions, working through the question paper in the order set
- read the introductions to the texts carefully
- paid attention to the guidance offered to help them focus their responses – for example, writing no more than 120 words in **1(f)** the selective summary task and using three precise examples from each of the specified paragraphs in **2(d)**
- focused on the particular evidence of skills and understanding they needed to demonstrate for each type of question
- avoided unselective copying and/or lifting from the text
- did not include unrelated opinion/generic comments and/or invent material not tethered to the text used their own words where required
- planned the ideas to be used and the route through extended responses before writing, selecting only relevant material for each question
- checked and edited their responses to correct any careless errors, incomplete ideas or unclear points.

General comments

Candidates' responses indicated that they were familiar with the format of the Reading paper and the demands of each of the three questions had largely been understood. There were a few instances where whole tasks had not been attempted. On occasion, responses to part questions were incomplete or missing and/or responses were uneven, which limited the possibility of scoring higher marks. Candidates seemed to find all three texts accessible, and the majority demonstrated engagement through their responses. There were many excellent responses to all three questions, though candidates do need to ensure that they do not spend too long on one question at the expense of another. Occasionally a failure to follow the rubric limited opportunities to demonstrate understanding. This was most common in **Question 2(c)** where a candidate did not select a clear example or tried to discuss several examples from the text provided, or in **Question 2(d)** where some candidates selected long chunks of the language in the specified paragraphs rather than selecting words and phrases or discussed fewer than six language choices. A number of candidates needed to plan more carefully to include a full range of relevant ideas in their responses to **Question 3**. Candidates are also reminded that the word guidance offered in **Question 2(d)** and **Question 3** is not a requirement of the task in itself and there is no need for them to spend time counting every word – the guidance is offered to help candidates organise their time efficiently and offer sufficient evidence of their skills and understanding to target higher levels.

In **Question 1**, the most effective approach taken by candidates was to work through the tasks in the order presented paying careful attention to the number of marks allocated and the space provided for their responses as helpful indicators of how detailed their responses needed to be. They did not add further unnecessary and/or contradictory material but focused on answering each question as set. Most candidates were careful to follow the line or paragraph references in the questions to help them to move down **Text A** in order and the most effective had reworked material where appropriate to show secure understanding of implicit as well as explicit ideas. Less effective responses to **Question 1** tended to lack focus on the question. At times candidates used the language of the text where they had been asked to use own words – for example, in **Question 1(b)(i)** by repeating the word 'interviews' instead of explaining it, or in **Question 1(b)(ii)** where they copied 'stages'. In **Question 1(f)** a few candidates relied heavily on the language of **Text B** and/or copied out lines of text, limiting the available evidence of their own skills and understanding as a result.

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In **Question 2** candidates were required to select and/or explain carefully selected words or phrases from the text. More effective responses were able to identify choices clearly, consider meanings in context and in **2(d)** suggest the effects of the powerful language identified, often demonstrating further their understanding of the writer's purpose in an overview. More effective responses were careful to refer back to **Text C** to locate relevant choices and consider their precise meaning in context. In **Question 2(a)** those who copied out longer sections from the text rather than identifying the exact word/phrase that matched the sense of just the underlined word/phrase in the question were not providing secure evidence of their understanding. Likewise, opportunities for marks were missed by a few candidates in **Question 2(c),** who attempted to offer a generalised overview without clearly identifying one example from the text in their explanation. Less effective responses did not always choose appropriate language to discuss and/or in **2(d)** only selected three examples in total.

In **Question 3** the majority of responses attempted to address all three bullets in the question, although some candidates found it challenging to develop ideas for the third one. Most candidates wrote as Ben with the best responses developing a convincing voice and an appropriate tone for his journal entry demonstrating understanding of the reflective element of the task. Better responses used the ideas and details in the text selectively to work through the bullets logically. They were able to explain how Jojo felt about his interview experience and why he did not accept the job, including the changes Ben will make to his own behaviour and the buildings, as well as outlining his future plans for developing the business to persuade Jojo to continue working with him by selecting a range of appropriate ideas and details from the text to develop. Mid-range responses often missed opportunities as a consequence of uneven focus on the bullets of the question, a lack of planning beforehand and/or offering a narrow range of ideas from the text overall. Less effective responses either offered only brief reference to the passage and/or included evidence of misreading or sometimes invented material that was not tethered to the text. Some responses copied unselectively thus providing little evidence of understanding.

Paper 1 is primarily an assessment of Reading, however 15 of the 80 marks available are for Writing – 5 marks in **Question 1(f)** and 10 marks in **Question 3**. In these questions, candidates need to pay attention to the quality of their writing to maximise their achievement. Candidates are advised to plan and review their responses to avoid inconsistencies of style, awkward expression and to correct errors that may impede communication.

Comments on specific questions

Question 1 Comprehension and summary task

Questions 1(a)–(e)

In response to **Text A: Technology in the job application process**, candidates were asked to response a series of short answer questions. More effective responses paid careful attention to the command words in the instructions as well as the number of marks allocated to individual questions. These responses demonstrated sound understanding by selecting appropriate details and evidence from the text in concise, focused responses. Less effective responses often repeated the language of the text where own words were required and/or relied on copying longer sections of text with little or no modification to address the question as set. Some candidates offered several possible answers thus using time inefficiently and diluting evidence of understanding.

(a) **Give two different types of technology being used by companies to help them to manage applications, according to the text.**

In **Question 1(a)**, most candidates recognised that chatbots or automated applicant-tracking were different types of technology being used by companies to help them to manage applications; very few candidates did not gain the mark for this question. A few read less carefully and offered incorrect answers such as 'Artificial Intelligence (AI)' or 'pre-recorded interviews'.

(b) **Using your own words, explain what the text means by:**

(i) **'schedule interviews' (line 3)**

(ii) **'early stages' (line 4).**

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In **Question 1(b)** candidates were instructed to use their own words to evidence understanding of the phrases in the question. Where responses failed to achieve both of the marks available for each phrase it was usually due to the candidate's partial use of the words from the text. For example, in **Question 1(b)(i)** a number of candidates were able to explain 'schedule' but then used the word 'interviews', thus not fully addressing the task. More effective responses were able to explain the full phrase as used in the context of the text by demonstrating understanding of arranging a time to question a candidate or talking with someone about a possible job. Similarly, in **Question 1(b)(ii)**, some candidates effectively explained the meaning of 'early', though repeated 'stages' in their explanation, rather than suggesting that technology is in its initial developments or first phases.

(c) Reread paragraph 2 ('Though … expressions.').

Give <u>two</u> mistakes that should be avoided by an applicant during an automated interview.

To achieve both marks for this question candidates were required to offer two mistakes that should be avoided by an applicant during an automated interview. Most candidates were able to effectively identify dressing inappropriately and assuming they can re-record responses. Where candidates failed to gain both marks, it was usually because they were not clear about the facial expressions and offered it without explanation, included vague comments about dressing as you are or referred to asking common interview questions that was a **Question 1(d)(i)** response.

(d) Reread paragraphs 3 and 4 ('In pre-recorded … right person.').

(i) Identify <u>two</u> advantages for the applicant of the use of technology in the job application process.

(ii) Explain the challenges the internet has created for companies looking to hire people for jobs.

To answer **Question 1(d)(i)** candidates needed to identify two pieces of evidence from paragraphs 3 and 4 to demonstrate the advantages for the applicant of the use of technology in the job application process. Correct responses focused on predictability or that you can prepare for interview questions, you can apply online, or you can apply for more jobs. Most candidates found this question relatively straightforward and were able to gain both marks. In **Question 1(d)(ii)** many candidates were effective in gaining two of the three marks available by referring to there being too many applicants to deal with and that it is difficult to identify the right person or the right person might not stand out. Some candidates did not get the second or third mark because they only offered two explanations perhaps missing the fact that this was a 3-mark question and therefore required three distinct points to be made.

(e) Reread paragraph 5 ('Perhaps … application.').

<u>Using your own words</u>, explain the qualities that applicants need to demonstrate to be successful when applying in a competitive job market.

In **Question 1(e)** the most effective explanations reworked the relevant information only, using their own words as appropriate to tease out implicit ideas, identifying from the four available three distinct reasons in their explanation of the qualities that applicants need to demonstrate to be successful when applying in a competitive job market. Many candidates identified keeping their social media appropriate and being personable by reaching out to the hiring manager, as well as being strategic. Less effective responses tended to copy directly from the text without explanation or mentioned only partial details, such as referring to either font or colour without addressing both elements. Additionally, some candidates attempted to reword being focused and strategic, though in doing so, occasionally altered the meaning, which led to misinterpretation.

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(f) According to Text B, what are the signs that you may need to find a new job?

You must use continuous writing (not note form) and use your own words as far as possible. Your summary should not be more than 120 words.

Your summary should not be more than 120 words.

Question 1(f) was based on **Text B: Signs it's time to make a bold career change!** and required candidates to select relevant ideas from the text and organise them into a focused summary which addressed the task. Most candidates were able to demonstrate at least a general understanding of the text and offer some relevant ideas to demonstrate understanding of the signs that you may need to find a new job.

Where responses were most effective, candidates had made a consistent attempt to plan, organise and use their own words to convey a wide range of relevant ideas efficiently and accurately to their reader. Overview of the material was evidenced in some of the most effective responses where relevant ideas had been carefully selected from different parts of the text and reordered where necessary to aid fluency and achieve logical progression. Responses in the middle range tended to consider a more limited range of ideas, the most common being how work can negatively affect your health, being stuck in the same job for years, being over-qualified for the job and no opportunities for growth. These responses often missed the more subtle points about boredom, no longer loving what you do, low morale in the company as a whole, or the job has become impractical. There was also a tendency to offer being 'underpaid' as a reason to find a new job without including the sense of it being the result of not earning enough to live on or not being able to exist on their current salary as suggested in the text. Some less effective responses repeated the same ideas or included unnecessary examples such as registering for mynewjob.com, information about recruiters and the number of hours the average person spends at work over a lifetime.

Length was often an indicator of the level of the response with some less effective responses being too short due to a limited number of points being offered and other responses very long and wordy due to the inclusion of unnecessary information and/or personal comments. The most effective responses tended to adhere to the advised length through adopting a concise and focused approach to the task. In most responses there was an attempt to use own words although some candidates did rely on lifting phrases from the text and wrote from the perspective of an employee rather than using an informative style. This included some responses where there was evidence of selection and a range of ideas but also a failure to use own words which is an important aspect of summary writing. Examples of the most commonly lifted phrases were 'high-pressure roles can negatively affect physical or mental health', 'regularly daydreaming about storming into your manager's office to resign', 'If morale is low throughout the company', 'a position that doesn't offer growth opportunities and training', 'If you're continually passed over for promotion' and 'If you struggle to live on your current salary'. Some responses copied indiscriminately without any effort to select relevant ideas or included too much introductory information.

The majority of candidates showed at least some awareness of the need to include only those ideas relevant to the focus of the question, though not all were able to select ideas efficiently to navigate around more obviously redundant material. For example, references in partially effective responses to 'high-pressure roles can negatively affect physical or mental health' were more succinctly covered by umbrella phrases such as 'burnout' or 'negatively affecting your health' in most effective responses. Where candidates had simply tried to paraphrase the text rather than select only those ideas necessary to answer the question, their responses often contained superfluous detail compromising both evidence of Reading, through the use of excess or indiscriminate selection, and Writing, resulting in a lack of concision. More effective responses were not dependant on the structure or language of **Text B** to communicate their ideas and were consequently able to offer more concise explanations.

Advice to candidates on Question 1(f):

- read the task instructions to identify the focus of the summary task then read **Text B** again to identify just the relevant ideas for use in your response
- plan the response using brief notes to ensure a wide range of ideas from the text is selected
- discard any details which do not address the question

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- do not add details, examples or comment to the content of the passage
- organise the ideas, synthesising and grouping them where relevant, to ensure that your response is coherent
- check whether there are repeated ideas which could be covered by one 'umbrella' point
- write your response using your plan rather than the text to avoid lifting
- write informatively and accurately in your own words, avoiding errors which affect meaning
- explain ideas in a way that someone who had not read the text themselves would understand
- check back to ensure that you have included all the ideas you planned to
- try to keep to the guidance to 'write no more than 120 words'.

Question 2

(a) **Identify a word or phrase from the text which suggests the same idea as the words underlined:**

(i) **Jojo nearly crashed into the lorry.**

(ii) **Jojo hoped that when he visited The Peacock for his interview that day the people he might be working with if he got the job would like him.**

(iii) **Jojo was slightly jealous of how well Ben got on with guests.**

(iv) **The table covering Jojo provided for Ben and the guests to use at lunchtime was immaculately clean.**

The most effective responses to **Question 2(a)** focused on only the underlined word or phrase, precisely located the correct version in the text and gave it as the answer. Other responses copied the whole sentence from the question replacing the underlined phrase with the correct words from the text. This was an acceptable approach but unnecessary as it wasted examination time. Responses that used the text more widely than in the equivalent phrase/sentence could not be rewarded even where the correct word or phrase was included incidentally. For example, some candidates missed opportunities for marks by offering responses that added in extra words from the text that went beyond the meaning of the underlined words, such as 'I almost collided my bicycle with the large lorry' in **2(a)(i)**, 'I needed to impress my potential new colleagues.' in **2(a)(ii)** or 'I admit I envied a little' in **2(a)(iv)**. Very occasionally, candidates had misread the instruction to 'identify a word or phrase from the text' and tried to explain meaning in their own words or identified an incorrect word - most notably offering 'sanitised' for 'pristine' in **2(a)(iv)**. Other less effective responses only offered part of the phrase by omitting 'potential' in **2(a)(ii)** or 'a little' in **2(a)(iii).**

(b) **Using your own words, explain what the writer means by each of the words underlined:**

I waited anxiously for it to finish its delivery of frozen foodstuffs. Being behind schedule today wasn't an option. Brown boxes destined for some awful fast-food restaurant were finally off-loaded and I resumed my commute.

(i) **anxiously**

(ii) **schedule**

(iii) **resumed**

In **Question 2(b)**, some responses offered just one carefully chosen word or phrase as their answer, whilst others offered evidence of understanding through longer explanations. Either approach could be creditworthy, though candidates should be careful not to dilute evidence of understanding by offering various suggestions and extra guesses of different meanings that are contradictory and/or not in line with the text. Responses that included other potential meanings and guesses that were not correct in context could not be credited. A few candidates were unsure of the meaning of 'anxiously' – for example, suggesting that it meant excited or impatient. Effective responses had considered the precise meaning of each of the underlined words as they were used in the text. For example, the word 'anxiously' in **2b(i)** refers to worriedly or nervously. Many candidates were able to explain 'schedule' in **2b(ii)** as the time things are meant to happen, the planned time or the timetable. In **2b(iii)**, 'resumed' was usually effectively explained as 'carried on

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with', 'continued' or 'restarted'. The most effective responses to **Question 2(b)** thought carefully about meanings in context and offered viable answers which would accurately replace the words in the text without altering the meaning.

(c) Use <u>one</u> example from the text below to explain how the writer suggests Jojo's feelings about conditions in his workplace.

<u>Use your own words in your explanation</u>.

By dawn, I'd arrived, parked against a disused outbuilding and begun the hazardous operation of re-starting the ancient, moody generator. Still coughing from the smoke, I entered the kitchen, loudly listing the merits of solar power and onsite staff accommodation, then turned my attention to the wooden worktable peppered with curling skins of yellowing paint, fallen from the ceiling.

In **Question 2(c)** candidates were required to select one example of language from the specified section of the text and explain how it suggested Jojo's feelings about conditions in his workplace. Some underlined their chosen example in the text, whilst others copied it out as a subheading for their explanation – either approach was acceptable. A few of the least effective responses attempted unwisely to rewrite the whole extract in their own words and/or discuss it in very general terms only or offered phrases such as 'By dawn. I'd arrived' which did not address the requirements of the question which related to Jojo's feelings about conditions in the workplace.

The most effective responses offered a concise quotation then considered what the writer suggested about Jojo's feelings through the language used. The most popular example was 'hazardous operation of re-starting the ancient, moody generator' and many responses explored how it was unreasonable for Jojo to expect this every day and how dangerous the task was due to the old and unreliable equipment. Other responses considered the example of 'peppered with curling skins of yellowing paint fallen from the ceiling' and were able to explore ideas about how unhygienic the workplace was as a result of the unattractive flakes of paint everywhere which Jojo had come to expect each morning as part of his routine to clean up. Some candidates were able to offer convincing explanations of 'loudly listing the merits' and show understanding of Jojo talking about the positives at a high volume and presenting the arguments for onsite accommodation and solar power as he had had enough of the commute and the generator. Some less effective responses tried to do too much, selecting several examples and therefore only offering slight explanations of each. Only one example could be rewarded so offering more was a waste of valuable examination time that could have been spent on **Question 2(d)** where more developed responses are expected.

(d) Reread paragraphs 9 and 11.

- **Paragraph 9 begins 'The ancestral font …' and is about The Peacock restaurant.**
- **Paragraph 11 begins 'Propelled …' and is about Party Planet.**

Explain how the writer uses language to convey meaning and to create effect in these paragraphs. Choose <u>three</u> examples of words or phrases from <u>each</u> paragraph to support your answer. Your choices should include the use of imagery.

The most effective responses to **Question 2(d)** offered clear analysis of three appropriate language choices from each of the two paragraphs indicated in the question. The most effective approach was to consider the meanings of carefully chosen individual words, phrases or images in the context of the text and then consider their effects in terms of connotations and the atmosphere or attitudes created by the writer's language choices. These responses often offered a clear overview of the writer's intentions in each paragraph. Effective responses set out to narrow down their options and decide which six of those relevant selections that they felt best able to explain, rather than attempting to deal with all the potential choices or simply defining literary devices in each half they came across. Where candidates had considered all of the key words in slightly longer choices, they were able to avoid those more generalised comments of less effective responses and offer more secure evidence of understanding. Responses evidencing understanding at level 5 frequently showed imagination and precision when discussing a judicious range of language choices and offered answers that were balanced across both parts of the question.

Less effective responses tended to offer less developed analysis or repeated the same ideas about effects, most notably that it was impressive in The Peacock restaurant in paragraph 9 or that it was

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childish in Party Planet in paragraph 11, often making rather generalised assertions rather than considering specific words more closely. Middle range responses were usually more effective when explaining meanings but struggled to explore the effects fully, and the least effective responses tended to offer quotations, sometimes rather unselectively, and struggled to find anything relevant to say about them. Some candidates chose three language choices in total rather than three from each paragraph as clearly stated in the question resulting in some underdeveloped responses. A number of candidates chose inappropriate language choices – sometimes plain language, such as 'To avoid doubt, I informed Artur of my own credentials' or 'I looked forward to working with him,' offering limited opportunities for developed discussion.

In paragraph 9, many were able to explore their individual choices within the context of The Peacock restaurant as a formal dining place that was past its former glory. They considered the intricate, old fashioned lettering style of the 'ancestral font of the glass protected menu' that was displayed as if it was valuable. Many focused on how 'every letter curled elegantly, imitating the showy tail-feathers of the fancy fowl itself' and how the text was meant to represent a peacock's feathers as it was very self-conscious and concerned to impress. Others focused on 'immense gold picture frames displaying darkened portraits of important-looking people' where the descriptive language suggests how ostentatious, oversized and old-fashioned the pictures were, although it was not clear who the people were. These choices could all be linked to an overview, yet considered independently, offering candidates a great deal of scope for precise and developed analysis of the language used in paragraph 9.

In paragraph 11, many responses were able to appreciate how the newly established Party Planet was both unconvincing and disappointing and contrasted with the main restaurant. Many candidates opted to discuss 'plastic UFOs and cardboard space rockets' as unconvincing models made from cheap materials. Another popular choice was 'fashioned into undersized chairs and surprisingly low tables' creating a feeling that the furniture was unusually small and Jojo had not yet realised that it was designed for children. This was often linked closely to 'bank of microwaves and brown boxes' that serves as a reminder of the foodstuffs in brown boxes that were delivered earlier and gives the impression that this was the 'awful fast-food restaurant'. The numerous appliances suggest that it was dull and lacked creativity which contrasts with Jojo's earlier dream kitchen. Finally, many candidates selected 'propelled', suggesting that Jojo was pushed into another room as though he had no choice.

There were also candidates who used the language of the text repeatedly in their explanations: most commonly 'expensive'. 'elegant', 'fancy'. 'flair' and 'passion'. There was some confusion about the 'waterfalling faded-velvet curtains' with some candidates suggesting that they were new and impressive without capturing the sense of them now being jaded, which was similar to the portraits whose colours had also dimmed over time. Others managed to capture the idea of the aged chef who wasn't hurrying in 'Eventually, an elderly chef, Artur, escorted me', though few were able to effectively explore the notion that he was treating Jojo formally or as if he could not be trusted to go through on his own. Some less effective responses also included very long quotations with general explanations rather than engaging closely with specific words. On occasions where no quotations were included with a brief description of the paragraphs offered instead, these responses did not address the question at all. In a small number of responses, the wrong paragraphs were used so no choices could be credited: candidates are advised to look at the section of text supplied in the question as well as the paragraph number to ensure that they select language choices from the correct paragraphs.

Candidates are reminded that it is the quality of their language analysis which attracts marks. Listing of literary devices and/or the selection of plain language from the text is unlikely to lead to an effective response. Many candidates simply identified literary devices offering vague explanations such as 'it's an interesting metaphor' with no attempt to look at the words themselves. In this question candidates should focus carefully on words used in an interesting or unusual way: for example, rather than simply focusing on 'cartoons of friendly alien lifeforms' to explain the caricatures of smiling space life, adding the words 'adorned the walls' to the language choice allows a much more developed exploration through considering how the room was decorated which gave a ridiculous or childish appearance. It is this precision when selecting language choices to include carefully chosen words that will maximise candidates' opportunities for developed discussion.

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Advice to candidates on Question 2:

- make sure that any quotations you select from the text are precise: do not copy out lines or chunks of text, miss out key words or include only part of the choice
- in each part of **2(a)** make sure that your selection is clearly identified – remember you are looking for just a word or phrase from **Text C** to match precisely the sense of the only underlined words in the question
- in **2(b)** be careful that your explanation is consistent with how the word is used in context (if unsure, try substituting your answer in the text to check it)
- in **2(c)** try to say three separate things about your one chosen example
- in **2(d)**, choose 3 examples from each of the two specified paragraphs (6 choices in total)
- only offer an overview in **2(d)** if you have spotted that there is a relevant connection between your chosen choices in a paragraph
- when you are unsure how to explain the effect in **2(d)**, start by explaining the precise meaning in context of the word(s) in the choice and work from there
- when explaining how language is working avoid empty comments such as 'the writer helps us to visualise the scene'; you need to say how your chosen example does this to show your understanding
- when exploring images, consider the connotations and associations of the words within choices to help you to suggest the effect the writer might have wanted to create
- allow time to edit your responses – for example, to add in further detail and/or correct errors to help show you have read carefully and understood.

Question 3:

You are Ben. When Jojo returns that evening, you have an honest conversation about the events of the day and your plans for the business. You persuade Jojo to continue working with you as your new business partner.

In your journal entry you should:

- **explain what Jojo felt about his interview experience that afternoon and why he did not accept the job**
- **explain the changes you will make to your own behaviour and to the buildings to improve Jojo's work life**
- **explain the plans you have to develop the business and the different qualities and skills you and Jojo have to make it a success.**

Write your journal entry for the day.

Base your journal on what you have read in Text C, but be careful to use your own words. Address each of the three bullets.

Write about 250 to 350 words.

Question 3 required candidates to write Ben's journal entry reflecting on his conversation with Jojo about the events of the day and his plans for the business in response to **Text C: Jojo's interview**. The three bullet points in the question offered guidance to candidates to help them identify relevant ideas for their journal entry. The first and second bullets required candidates to retrieve relevant information from the text and develop the ideas to explain what Jojo felt about his interview experience and why he did not accept the job, and the changes that Ben would make to his own behaviour and to the buildings to improve Jojo's work life. The third bullet required candidates to infer what plans Ben may have to develop the business and the different qualities that he and Jojo have to make it a success using details and clues in the text to indicate possible ideas and support the inferences. A few candidates attempted to answer the question as Jojo, whilst others confused Ben's small hotel business in an old stone farmhouse with Party Planet and wrote as though they were the owner and had interviewed Jojo for the job there which limited the development they were able to offer as a result. A number of candidates missed the opportunity to develop a wide range of key ideas appropriately – for example, by writing a letter from Ben to Jojo or writing a dialogue instead of a journal entry.

The majority of candidates were able to show general understanding of the text addressing the task by using some of the main ideas in the text to support the response. Many of the responses were also able to develop the ideas by creating a convincing voice for Ben and interpreting the events from his perspective, evaluating

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the ideas and adapting them accordingly. Where candidates had followed the bullets carefully, they were often able to develop explicit and implicit ideas effectively to include convincing articulation of Ben's feelings about his plans for his business. Many dealt with his feelings about his relationship with Jojo very effectively through acknowledging the longevity of their friendship and his appreciation of Jojo's creativity and innovative flair as a chef. Less effective responses tended to track the text often paraphrasing it closely and therefore lacking development of Ben's perspective on the events. Some in the mid-range missed potentially useful details about Jojo's interview experience, such as the elderly chef, Artur, who left Jojo waiting on the doorstep or the manager, Paul, who appeared to actually like the place and thought it was a success. Where candidates had planned their response beforehand, they were often able to draw on relevant ideas and details from throughout the text to address this first bullet effectively and offer development about The Peacock restaurant and how it was old-fashioned and not as good as expected. They went on to explore how Jojo would have no opportunity to show his creativity in Party Planet that was designed only for children with its ready prepared food and its gimmicky frozen food. There was also some interesting development around the unprofessional image created by the astronaut themed uniform.

In mid-range responses, ideas for bullet two were often only touched on through recounting details of replacing the generator, redecorating the house and modernising the kitchen, whereas more secure responses were able to offer development by explaining how the disused outbuilding could be renovated to create staff accommodation on site so Jojo would no longer have to get up so early to travel to work. Candidates responding to the text and task more carefully were able to pick up on suggestions that Ben felt disappointed that Jojo did not tell him about the interview and planned to consider Jojo's feelings in future as they went to school together and had worked together for years. They also described how Ben planned to show more respect to Jojo by using the title he preferred. Some less effective responses simply repeated ideas from the text about the buildings with very little attempt to explain Ben's thoughts and feelings about these changes, such as how replacing the unreliable, dangerous generator for solar power would be an advantage.

When responding to bullet 3 the most effective responses focused on the evidence in the text such as Ben's easy manner with the guests, providing great food due to Jojo's culinary skills and acquiring money from investors. The most effective responses used these ideas to develop considered suggestions of how they would offer guests a relaxing holiday with freshly cooked food and would be able to fund the changes with the possibility of employing extra staff. Other developments included ideas about the authenticity of the place as Ben had helped his father to run it, and the genuine cultural experience contrasted with The Peacock and Party Planet. They also picked up on subtle details such as Ben's hiking gear and developed the idea of the rural location to offer hiking to guests. Less effective responses included ambitions for the business which had no grounding in the text at all such as building a swimming pool, opening a cocktail bar or chains of restaurants around the world. These responses often added new material without any tethering to the ideas in the text. These included details about Ben and Jojo's relationship in school, or what they like to do in their free time.

Candidates are reminded that their response to **Question 3** needs to be relevant to the details of the text and task in hand in order to effectively evidence their Reading skills.

Candidates seemed comfortable and familiar with the format of a journal entry with most adopting an appropriately reflective tone. The less effective responses tended to be too narrative as they relied too heavily on the sequencing of the original text and did not offer reflections and interpretations to adapt the material to indicate what Ben would be likely to include in his journal. The language used was mostly appropriate and some more effective responses created a wholly convincing voice as Ben, capturing his annoyance with Jojo for not confiding in him about the interview but also his appreciation that he should be more respectful and present a more professional image. In less effective responses the language and voice were rather plain but rarely inappropriate for the character. Some responses were clearly and skilfully written, though others struggled to maintain fluency resulting in some awkward expression. Candidates are advised to check through their work carefully to correct errors that may affect meaning and/or fluency. There were a few instances of wholesale lifting from the passage, and some other candidates were over-reliant on lifted phrases and sentences. Some of the most commonly lifted phrases were descriptions of the kitchen in the text: 'the ancient, moody generator', 'my fantasy kitchen's gleaming stainless-steel surfaces and modern equipment' and the description of Party Planet: 'undersized chairs and surprisingly low tables', 'buttons and strings of small lights' and 'a bank of microwaves'. Candidates should be aware that use of own words is necessary both to show understanding of what they have read and also to access writing marks in the higher levels.

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Advice to candidates on Question 3:

- remember to base your response to **Question 3** on just the ideas and details you find in **Text C**
- pay attention to details of the task as set **–** for example, note the form of the response and the perspective/viewpoint you need to adopt
- decide on the voice and style you want to create and maintain that in your response
- give equal attention to each of the three bullet points to help you to identify a wide range of relevant ideas you can use in your response
- plan a route through your response beforehand: you can choose not to follow the order of the bullet points and/or link ideas from each
- do not invent information and details beyond the scope of the passage; look for the clues and evidence in the text to help you make judgements about characters and situations
- do not copy directly from the text: use your own words as far as you can to express your ideas
- try to do more than just repeat details of what happened: developing ideas allows you to better show your understanding, for example by explaining feelings or commenting from the point of view of the character you are writing as
- leave some time to check through your response.

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FIRST LANGUAGE ENGLISH

Paper 0500/21
Directed Writing and Composition

Key messages

This paper was mainly assessed for writing, although there were fifteen marks available for reading in **Question 1**.

In order to achieve high marks, candidates were required to:

- use an appropriate form and style in both questions
- structure ideas and organise their writing effectively to engage the reader
- produce detailed and evocative descriptions and engaging, credible narratives
- understand how different audiences, purposes and genres should influence the style adopted
- construct varied sentences accurately, with a clear attempt to influence and interest the reader
- use precise and wide-ranging vocabulary, appropriate for the task.

General comments

Most candidates were familiar with the format of the examination paper and understood what was required for both the directed writing and composition questions. There were some very brief scripts, incomplete scripts and some in which copying of large sections of the reading texts made it difficult to assess the candidate's own abilities. Some lifting of phrases or sentences was fairly common; where this lifting of material was more extensive, marks were inevitably limited for both Reading and Writing. There were a small number of responses to **Question 1** which were entirely copied from the texts and a few scripts contained no **Question 1** response but nearly all candidates understood the instructions for the examination.

In ***Section B***, most candidates understood how the content of descriptive and narrative writing differs, although there were stories submitted for the descriptive writing tasks, especially **Question 3**, which made it difficult for examiners to award high marks for Content and Structure. **Question 5** was sometimes addressed in a more discursive than narrative style. Where this was seen, the response was usually a discussion of different measures of success or different kinds of successful careers and again this sometimes limited the Content and Structure mark available because the mark scheme directs examiners to reward characteristically narrative features.

Nearly all responses showed a clear understanding of and engagement with the topic of volunteering by school or college students in the reading texts in **Question 1**. Most responses attempted an appropriate style and format for an article with an audience of young people, with varying effectiveness. The register required here was interpreted in different ways with some responses more formal in style while others adopted a conversational tone which sometimes showed an awareness of what would engage a younger readership. Some misunderstood this less formal register, however, and slipped into a colloquial, less accurate style, using words such as 'kinda' and 'gonna', which was inappropriate in the context of an examination. The majority of candidates approached the topic using their own words rather than lifting or copying the words in the passages. More effective answers here also tended to structure responses independently, selecting and commenting on the details in the texts in a coherent response. Some opinion, based on ideas in the texts, was often given about how students would react to the instigation of a volunteering scheme in school, with only a minority simply reporting the facts and ideas in the texts with no comment on them. More effective responses tended to comment on specific ideas in the texts, such as the contradiction between compulsion and genuine volunteering. Sometimes, responses reflected the ideas in the texts in a more straightforward, practical way without addressing these wider ideas about the nature and value of volunteering in a school context. A common issue was that the scheme itself was not discussed and comments focused on volunteering without reference to what was being proposed. There was also some misreading of the scheme with candidates suggesting that, for example, the school should not compel students to give up their

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evenings and weekends when Text A outlined how it would operate within the school timetable. More effective evaluation tended to probe some ideas in the texts and examine carefully the implications of the scheme on different groups, rather than record or summarise what was in both reading texts.

Less effective responses tended to repeat the ideas in the texts, rather than selecting points and commenting on them. Some salient ideas in the texts were side-stepped rather than examined. For example, many candidates suggested that the scheme should be optional rather than compulsory but did not really justify this to show an understanding of the inevitable tension between freely giving up one's time and being made to do so. The details of the scheme were sometimes not well-understood at this level. Sometimes an assumption was made that teachers would resent having to supervise students in their volunteering work when Text A specifically precluded this. Most commonly, the implementation of the scheme to work within school hours was not completely understood. This meant that opportunities to examine and evaluate the implications of reducing teaching time or narrowing the range of academic or sporting experiences were missed.

Most made good use of the bullet points in the question to help structure the response and the ideas in the texts were scrutinised thoughtfully in more effective responses. Effective evaluation often addressed the inherent contradiction between true volunteering and compulsion, some outlining how this would diminish its real value and others acknowledging that, while not truly voluntary, its impact on the students and others would nonetheless be beneficial. The structure and organisation of ideas required in an article, often including some rhetorical sub-headings or clear lines of argument, were used effectively in better responses to persuade and argue a case. Less effective responses were often written in a flat, reporting tone with less consistent awareness of the audience and purpose of the task.

In ***Section B***, effective responses to the composition questions were characterised by a clear understanding of the genre selected, descriptive or narrative, and of the features of good writing in each.

Descriptive writing at the highest level was evocative and subtle and most responses gave a range of descriptive detail without resorting to narrative. There were many kinds of 'shelter' described for **Question 2** and Examiners accepted a very wide range of interpretations as long as the idea of 'sheltering' was essential to the response. Shelters for civilians during conflicts, animal shelters and huts found on walks to shelter from storms were amongst many interpretations which featured at all levels of achievement in these responses.

Less effective responses to this question were sometimes a little vague in depicting forest or other natural landscapes, often with the shelter only featuring tangentially after a much longer description of a journey. The purpose or nature of the shelter was sometimes unclear, giving rise to some confusion for the reader.

For the second descriptive writing question, there was a narrower range of interpretations of having to 'wait for a delivery' though some proved very effective in creating a sense of anticipation, nervousness or excitement. Whether the delivery awaited was a pizza, news through the post about examination results or news about the birth of a baby, the ability to evoke an atmosphere during the wait tended to determine how effective the description was.

Less effective responses here described relatively ordinary scenes and focused more on the narrator's actions while waiting, often unconnected to the idea of waiting and not really evoking an atmosphere of anticipation or a build-up of tension. While there were some effective responses which used the idea of waiting for a fast-food delivery, more thoughtful choices of what was to be delivered often elicited more effective responses.

Both narrative writing questions proved popular across the range of abilities. **Question 4** was a very common choice for candidates of all levels of achievement. Again, making a careful choice about what it was that 'could not be stopped' tended to help to determine how credible and well-constructed the narrative became. The sense of the inevitability of some action or consequence often helped to shape responses at the higher levels, including the narrator being unable to control an urge for revenge and the immense natural force of a tsunami.

This sense of jeopardy was often important in the creation of a believable response to this question.

Less effective responses tended to include the required phrase in a way which was less impactful or was incidental to an otherwise relatively straightforward narrative. While some at this level used credible scenarios, stories were sometimes mundane or lacked drama and pace.

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Question 5 elicited some, though fewer, highly engaging and well-constructed narratives, including some which used the idea of 'success' ironically in scenarios of bungled bank robberies or plans to steal examination papers. There was more of a tendency here to write discursively about the various journeys to success of sporting stars, often a discussion of different types of success or sometimes a simple set of exhortations to 'never give up' or to 'do your best'. These kinds of responses showed limited narrative shaping and content for Content and Structure, even when organised and paragraphed.

Comments on specific questions

Section A: Directed writing

Question 1

Write an article for your school or college magazine about whether or not a volunteer scheme for older students would be a good idea.

In your article you should:

- **evaluate the ideas, attitudes and opinions about volunteering in both texts**
- **consider the effects a compulsory volunteering scheme in school would have on students, teachers and the wider community.**

Base your article on what you have read in both texts, but be careful to use your own words. Address both of the bullet points.

Write about 250 to 350 words.

Up to 15 marks are available for the content of your answer and up to 25 marks for the quality of your writing.

Marks for Reading

Examiners awarded high marks for Reading where there was some probing and evaluation of the ideas in the reading material, rather than a straightforward listing and reproduction of the points in the texts. The most effective responses adopted a consistently evaluative, critical stance and read effectively between the lines of the texts, drawing inferences and making judgements about the efficacy or otherwise of compelling students to volunteer as part of their school curriculum.

More effective responses here focused carefully on the ideas about the true nature of volunteering explored in Text B and whether it could be reconciled with the scheme proposed by the writer of Text A. The highest marks were awarded for those which handled the different, often conflicting views with confidence and perceptive evaluation.

The extent to which the implicit ideas and opinions contained in the texts were scrutinised tended to determine the level of candidates' achievement. These implicit ideas often involved the effect of compulsion on the concept of volunteering and a range of impacts on students and others, such as the implication that students could develop independence because teachers would not supervise their efforts or that teachers would struggle to cover the syllabus because of re-timetabling to accommodate volunteering into the school day. Many responses, for example, reflected Text A's implied criticism of younger generations for their selfish fixation on academic success but better responses used that implication to contest the idea that students could be compelled to be compassionate simply by including it in the curriculum. Similarly, the effect on teachers was sometimes explained fairly simply using the lack of supervision as giving teachers a well-earned rest from teaching – a valid use of implicit ideas – while others combined this notion with reduced teaching time to highlight the potentially detrimental effect on students' academic achievement and grades.

There was sometimes some subtle grasp of the slightly assertive tone of Text A with some candidates offering a critique of the head teacher's contradictory ideas that a scheme that did not work in the past could be made compulsory as a way to instil values of kindness and compassion in students. Some saw the scheme as a way for the school to raise its profile on the back of the unpaid labour of the students: as one wrote, 'Its made so that the head master can toot his own horn and look in the mirror and say he is a good person.'

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In contrast, the sarcastic tone of the parent at the end of Text B was almost always missed with many candidates taking literally the suggestion that students should be sent home for an afternoon to help their families with chores. Occasionally, however, there was a thoughtful discussion about the difference between helping friends and neighbours and disadvantaged strangers, with the true spirit of selfless volunteering only being shown in the latter case.

The safety and potential exploitation of students in their volunteer placements was considered thoughtfully by some candidates, inferred from the lack of supervision by teachers and the notion, based on careful reading, that the vetting of charities could not ensure they would be protected from other volunteers or their clients. A bad experience could mean that rather than instilling an 'ethos of service', the scheme could mean students never volunteered in the future.

In more effective responses, the inherent contradiction of compelling students to volunteer was properly considered alongside the implications of Text B's comment that the true impulse to help others which underpins volunteering would not necessarily be in evidence under the scheme. These arguments often made use of Text B's depiction of young people as self-conscious and ill-equipped to deal with vulnerable people, suggesting that compulsion would negate any benefit to all concerned as a result. While many candidates suggested an alternative, optional scheme would be better, these comments were not always rooted in a rationale based on ideas in the texts but rather as a personal reaction to the idea of volunteering. Where clear inferences were drawn from specific ideas in the texts, examiners could award higher marks for Reading.

The extent to which these ideas were addressed often determined whether a response could be given a Level 5 mark for Reading and in some cases a range of more evaluative comments merited a Level 6 mark. Responses awarded marks in Level 5 characteristically offered one or two more evaluative ideas, often about the impact of a lack of supervision on students' independence or the dangers to their academic success in the light of fewer teaching hours.

Where some comment or opinion was offered, mostly without specific reference to particular points in the texts but generally relevant to the ideas in them, marks in Level 4 were usually awarded. These comments were usually less selective and included some details which were factually accurate but not evaluative, such as the scheme would cause more stress for students who would be concerned about preparation for examinations or that an optional scheme would be more acceptable to students. More general, if valid, ideas were also typical at this level with many responses listing the benefits of volunteering (rather than the scheme) for students, teachers and charities. At this level, there was sometimes a lack of close reading resulting in assumptions that leisure time would be affected or that students would be too exhausted after a long day at school to volunteer.

Examiners usually awarded marks in Level 3 for Reading where there was some coverage of the texts, and some selection of ideas from them, but where these were listed or simply recorded, or there was some more obvious misreading. Often, there was a clear paraphrase of both texts but limited comment on them. Where there were some brief opinions, usually at the end of the response, they tended to be more generally about volunteering rather than the scheme and not strongly anchored in the specific ideas in the texts. Some assertions were based on misreading of how the scheme would work and who would be involved and responses at this level were usually brief.

Comments made at this level were given mostly in candidates' own words. Less effective responses tended to paraphrase and list ideas and many given marks in low Level 3 and below contained much copied material. In a few cases the entire response was copied from the texts. Where a mark of 6 was awarded, some firmer roots in the passages were needed, whereas 5 was generally given for thin or mainly lifted responses in which there was some insecure grasp of the ideas in the passage.

Marks for Writing

25 marks were available for style and register, the structure of the answer and the technical accuracy of spelling, punctuation and grammar.

Style and audience

Candidates needed to adopt an appropriate style and register for an engaging, informative article for an audience of young people. Most responses showed a clear understanding of the required, largely formal but engaging register, even where technical writing skills were ineffective, and this allowed for examiners to consider marks for Level 4 and above where a 'sometimes effective style' was required. Some attempted to

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adopt a style of mediation between conflicting interests, exhorting their fellow students to get involved with volunteering. Some high scoring responses used a more rhetorical style, presenting their arguments in a more combative way, especially when pouring scorn on the ideas underpinning the headteacher's scheme. These responses made their case effectively and with some impact.

In the middle range of marks, examiners could sometimes award marks for Writing in Level 4 even where more technical writing skills were lacking if the style and register adopted were appropriate for the task and the audience. A clear, consistent attempt to engage young people with the arguments worked well. Conversely, some responses were generally accurate but were largely summaries of the reading material rather than adopting the style of an article or the register appropriate for a young audience. Sometimes, in reaching for an engaging, age-appropriate style and register, colloquialisms and slang were used, detracting from the maturity required by the seriousness of the arguments and the circumstances of examination writing.

Level 3 marks were usually awarded where the reading material was largely reproduced so that the organisation and sequence of sentences and paragraphs reflected the original and were not adapted to create a coherent style. Where the reading material was heavily lifted or copied, there was often little of the candidate's own style for examiners to reward, though these kinds of responses were fairly rare. Phrases and words such as 'nudged out of their comfort zone', 'feely giving something that money can't buy' and 'learn to navigate their way through without supervision' were often used but in some cases several sentences were also copied. More commonly, a range of expressions was lifted to express salient ideas which could then not be credited for either Reading or Writing. In more effective responses, ideas were incorporated into the writer's own style and selected for their usefulness to the overall argument rather than copied.

Structure

Responses awarded high marks for Writing handled the material confidently and presented their arguments cogently. The issues addressed were combined so that the judgements which emerged was clearly derived from the ideas in the texts but the response was not dependent on them for its structure and sequence. At the highest level, the lines of argument were set from the introductory paragraph and the issues in the two texts were addressed but as a cohesive piece. The opening and concluding sections of the most effective responses tended to introduce and summarise the main points, with the intervening sections arguing a coherent case. The argument being pursued determined the sequence of ideas in these responses rather than the sequence of the original texts.

Responses given Level 5 marks for Writing tended to reflect a range of points made in each text but were reordered to some degree in a response which was sensibly structured and paragraphed. An overall coherence and structure were required for this Level which was usually less evident in responses below Level 5.

Less effective responses sometimes struggled to provide a coherent argument and were more dependent on the sequencing of the original texts. In most cases the information given in the texts was offered with some rewording but not reordering of ideas, with some contradiction of points taken from each text. While some brief opinion was sometimes given at the end of the response, these views were asserted and imposed on the structure of the original texts rather than argued for.

Accuracy

Accomplished writing which was accurate and controlled as well as subtle in tone and register was given a Writing mark in Level 6. These responses were not only engaging in style and convincing in their arguments but fluent and virtually free of error. There was a range of precisely selected and complex vocabulary and sentence structures varied and were consciously used, often rhetorically, to engage the reader.

Some complex sentences structures were chosen which helped to balance and weigh up contending views and complex clauses were controlled by careful punctuation within sentences.

Level 5 responses were usually purposeful and clear, though perhaps not as ambitious and wide ranging in vocabulary or as precise in register or style as those given higher marks. Level 4 responses, as described in the marking guidelines, were 'sometimes effective' but not consistently so. Although the style was usually fairly plain, the language used was generally accurate. A range of relatively basic errors was made at this level which limited the effectiveness of the style but did not affect clarity of meaning. There were lapses in the use of definite and indefinite articles (usually omission) and some grammatical disagreement, often

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between plurals and verb forms. Common spelling errors in this mark range included some frequently used words in the texts, creating a jarring note when the topic covered meant there were frequent misspellings, such as 'volunteer' very often written a 'volenteer', misspelling of 'scheme', 'programme' and 'compassion'.

Faulty sentence structures, fluctuating tense use or too much lifted or copied material often kept Writing marks for **Question 1** below Level 4. These responses often showed reasonable clarity in conveying meaning but there was a wide range of relatively basic punctuation and grammar errors which meant that Examiners could not award marks in Level 4. The omission of definite or indefinite articles was moderately common, as were tense errors, and agreement errors were more frequent and more damaging to meaning at this level. In rare cases, material from the texts was copied; responses where this occurred more substantially could not be given marks in Level 4 for Writing or for Reading because neither the content nor the style of the response was the candidate's own.

Ways in which this type of answer could be improved:

- be prepared to challenge the ideas in the reading texts
- look for contradictions in the arguments and point them out
- group ideas from both texts together and discuss them rather than repeat them
- think carefully about the kind of style which suits your task and the audience
- check your writing for basic punctuation errors, such as missing definite or indefinite articles, ineffective control of grammar, or misspellings of key words, which are in the passage
- check your spelling of key words which appear often in the texts.

Section B: Composition

Descriptive writing

Question 2 – Write a description with the title, 'The shelter'.

Question 3 – Describe a time when you had to wait for a delivery.

Both descriptive writing questions were popular choices for candidates, though **Question 2** was much more often selected; examiners awarded a wide range of marks for these responses. Both questions elicited responses describing a wide variety of scenarios which examiners could reward appropriately. A sense of a very specific place, brought to life in vivid ways, was often key to the effectiveness of the description of shelters in **Question 2**. Shelters from war and conflict, both now and in the past, featured strongly amongst more effective responses. The use of underground stations in several city locations during wars worked well for some who could make use of closely observed details in their depictions of the physical location and the sometimes terrified, sometimes bored occupants: 'The man, dressed as if he was just going to work at 2 am when the sirens rang over the city, sat on the ground reading a book. His back upright and his tie straight, he could have been in a public library if it weren't for the dim light and the seething mass of terrified humanity around him. His eyes scanning the page only paused for a split second as the falling bombs made impact on the ground above.'

Other scenarios included previously unnoticed huts or sheds in more rural landscapes. These were often sought out or stumbled upon by walkers during a storm. In some effective responses, the contrast between the raging storm and the saturated landscape outside and the safety and warmth of the inside gave candidates opportunities to develop the detail and impact of their piece. While this scenario sometimes elicited some clichéd or exaggerated ideas and images, in the most effective it was often a quiet understatement which characterised the writer's confident creation of a cohesive picture in the reader's mind: 'Inside, a drenched man, silent as a ghost, made no sound as he retreated into the shelter. The only sign of life was extinguished when he blew out the match he held in his hand, obscuring his face once more.' In a description of a hospital shelter during a war, the face of a nurse was described as 'frozen stern by the uncountable deaths she has witnessed. The nurse pulled a grieving girl from the body of a dead soldier 'with all the force of indifference.'

Some shelters were unusual interpretations of the task, such as pieces describing safe spaces such as a homely family kitchen for a bullied schoolboy or the bedroom of an autistic person for whom the world outside was overwhelming and frightening. In a few cases, the shelter was another human being who offered a kind of sanctuary and a sense of protection. Where these responses were consistently and effectively descriptive in content, examiners accepted such interpretations of the task.

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Question 3 also elicited responses across the mark range. As mentioned above, the most effective focused on creating a vivid atmosphere of anticipation, nervousness or excitement. Here, as well as in **Question 2** and many previous descriptive writing tasks, the selection of a particular scenario often contributed significantly to the effectiveness of the response. While many chose waiting for a fast-food delivery to arrive, some included some exaggerated ideas and images about desperate hunger. Where the style was sometimes fluent and accurate, the content seemed hyperbolic and extreme: describing waiting for the delivery of a pizza, one candidate wrote, 'Slowly, sepulchral tears slid lethargically down my forehead catching the opalescent light like tiny beads of glass. Sweaty and impatient, my hands clawed at the foggy windows.'

Time and its passing often featured in interesting ways in responses to **Question 3**. There was often the conventional ticking of a clock or the 'painfully slow, pitilessly, glacially slow' movements of the clock's hands as one candidate described it, to mark the discomfort of waiting in many responses as well as the different ways in which delivery apps in the hands of the person waiting affected them. One writer described the dot on the screen showing where the delivery driver was as a 'digital promise' and in another response, the driver chose a circuitous route to the writer's house, frustrating the writer who knew 'he'd now been five minutes from my house for the last half hour and that arrow on my phone screen had mocked and taunted me the whole time.'

Some scenarios seemed more appropriately selected than waiting for a pizza delivery, however, in order to give candidates an opportunity to describe a range of different kinds of intense emotions. In one response, a small boy waits for post from home after being sent to live with a distant aunt: 'Every morning my breakfast would turn to sand in my mouth. Play was stripped of its ancient charms and I spurned my friends who knew nothing, my childish heart wracked with the pain of abandonment unexplained.'

Hospital waiting rooms also provided a suitable location for dramatic arrivals of babies or sometimes the results of medical tests which could be momentous. Observable details of sight and sounds were diverse and precise in the most effective responses: one described the light as 'a little too bright' and the sound of the telephone ringing at the abandoned desk' as 'jarring', yet when it stopped the 'weighted hush that fell on the room' was even more unwelcome. In responses where the tension was controlled but varied, shown through observed detail rather than hyperbolic language and imagery, the effects created were often very interesting and engaging.

In both descriptive writing questions, unusual, closely observed details created engaging, evocative scenes in the best responses. Where they were sustained and developed and showed skill in building a detailed, convincing overall picture, examiners could award marks for Content and Structure in Level 6. These consciously crafted pieces held the reader's attention by linking the different elements described in an interesting, cohesive response. Level 6 responses were characterised by this cohesive structure, often provided by the narrator's reactions or a specific atmosphere, as well as carefully chosen detail and striking images or extended motifs which held the piece together.

Level 5 responses tended to use a wide range of details and were well-constructed, if a little less effective and cohesive overall. At the bottom of Level 5 and in Level 4, responses were sustained and competently organised but usually a more predictable. Selected scenes and details at this level tended to involve less striking images and more stereotypical ideas, as mentioned above.

In both questions, where some responses lacked specific detail or the situation chosen was too mundane to sustain a more heightened range of ideas, marks for Content and Structure tended to be awarded in Level 4. Lower in the mark range, responses to both questions were relatively prone to narrative though Examiners rewarded description wherever it appeared. In the second question particularly, a minority of responses included narrative sections about what the writer did while waiting – making a cup of tea, phoning a friend, watching television – rather than evoking an atmosphere of anticipation or tension which was credible for the scene described.

Level 4 descriptions for Content and Structure tended to become more narrative in intent, and while most responses at this level were organised and paragraphed, the details included were simple and there was less use of images or a range of vocabulary.

Some lack of awareness of the essential elements of descriptive writing was evident in responses at Level 3, although they were sometimes fairly accurately written. These were sometimes entirely narrative and often brief and undeveloped.

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Narrative writing

Question 4 – Write a story which includes the words, '… it could not be stopped …'.

Question 5 – Write a story with the title, 'The path to success'.

Both narrative writing questions were popular choices for candidates across the mark range though **Question 4** proved to be a more common option than **Question 5**. There was a very wide range of plots, characters and scenarios in these responses as candidates took the opportunities offered by the open questions to determine the genre, style and content for themselves. **For Question 5**, examiners sometimes saw responses which showed some lack of understanding of the narrative genre.

Effective responses were well organised and thoughtful interpretations of the title which used engaging, credible ideas to create developed stories. An ability to shape the narrative and to produce moments of tension, mystery or drama and to vary the pace of the story were essential elements of more effective responses to both questions. In **Question 4**, the required line in the question gave candidates an opportunity to construct a story around the idea of something or someone unstoppable and where this idea was used as a central point in the response, the narrative often proved more engaging and cohesive. These stories often featured unstoppable forces of nature, such as storms, fires and floods, or other kinds of forces, such as alien invasions, illnesses or psychological impulses, as well as overwhelming social pressures in the form of bullying or forced marriages. Abstract concepts such as justice or love were convincingly used by some skilled writers, though perhaps in the middle range of achievement these ideas were a little more difficult to sustain. These choices were often important in determining the effectiveness of responses, even where more technical skills were not as secure.

Effective responses also showed evidence of the thoughtful use of other characteristics of developed narrative writing which are important in creating stories which engage the reader. Sometimes, concise and evocative description, scene-setting characterisation were used effectively. In one response, some economically written scene-setting helped the reader to imagine a gothic scene: 'The basement door yawned open. The candlelight licked the walls, casting twitching shadows like hanged men. Mother was sitting on the bed, her white, silk robe pooling around her like spilled milk.'

This economy of style and the use of images and striking ideas in narrative writing was typical of the most effective responses to this question. The confidence of understatement was a fairly rare but a clear indicator of an accomplished writer. Introducing an abstract concept as the 'unstoppable' force in the question, one candidate wrote: 'Regret settled in like the rain outside: quiet, steady, undeniable.'

In the middle range of achievement, responses were cohesive but often a little more predictable, with chronological structures and less developed characterisation and setting. These often involved floods or fires and occasionally a fairly coherent narrative used the phrase in the question as an incidental detail or part of dialogue which did not fit comfortably in the story and seemed more suitable as responses to other questions.

The subject matter at this level varied widely and some responses used scenarios which were difficult to control for less confident writers: zombie incursions, alien invasions and attacks by viruses were some of the choices made in this range in which the scale and scope of the narrative often made it difficult to use characters and settings which engaged and interested the reader. Nevertheless, many cohesive, organised responses were given marks in Level 4 for Content and Structure where there was enough shape and cohesion to meet the criteria.

Less effective narratives for this question tended to be brief outlines of a sequence of events, often lacking credibility and development but with some overall clarity. These often employed similar content to more effective stories but there was very limited characterisation and the focus was almost entirely on events and actions. Occasionally, the story was almost entirely written in dialogue with little actual narrative.

For **Question 5**, the idea of a 'path to success' was used imaginatively in more effective responses. The notion of what constituted 'success' was challenged in some thoughtful responses. One candidate wove a convincing story about a girl who had been sent off to boarding school to fulfil her evident academic potential and forge a successful career. She came to realise that these values, promoted somewhat heartlessly by her parents, were less important to her than those of friendship, companionship and loyalty, as she lived through bitter loneliness at school: 'I had no friends. Nights were spent pouring over textbooks in my dark room, tissues spread around me like the feathers of a moulting dove, soaked with the salty tears of a grief that comes from never having been a child.'

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Other paths to success involved more subversive versions of the idea, such as successful heists pulled off against the odds or escaping from some kind of entrapment by guile and deception. Some of these included some closely observed characterisation and description which enlivened the piece. In one successful robbery of a large corporate company which had driven the narrator's father to his death by their corrupt practices, the unknowing 'look-out' for the robber was his own child who was unwittingly drawn in by playing a simple game of 'I Spy'.

In other effective responses, candidates chose an unusual or interesting point of view from which to tell the story. One narrative involved a grandfather who had trained a grandson in the art of deception and who told the story of his grandson's rise to a rather dubious notoriety with obvious pride and affection, creating some interesting, ironic dissonance for the reader. In another, a story which began with many of the standard images and vocabulary of another bank robbery turned out to be an attack on a chicken coop by a group of foxes, told through the voice of the leader of the pack. The real nature of the attack, as well as the real identity of the protagonists and narrator, were revealed in carefully seeded words and phrases which only created a clear, satisfying picture by the end. At the beginning, the preparations were described: 'The rest of the crew assembled, most of them lumbering in a torpid haze, but that would change soon.' The lock on the coop is then broken by one of the crew 'clawing' at it, as if they were a gang of incompetent gangsters – a detail which only made sense when the real scenario came slowly to light.

These different versions of what 'success' might mean and the use of interesting points of view and storytellers helped to showcase how to use a task or question in a more engaging way. In the middle range, responses were often cohesive and there was sometimes some characterisation and scene-setting, but the stories were more conventional 'rags to riches' tales or narratives in which much hard work contributed to sporting or academic success. In most, there were some fairly predictable obstacles on the way which jeopardised protagonists' paths – examinations were failed, start-up businesses collapsed, sportspeople sustained crippling injuries – but success was assured at the end. Where there was a little more care taken over creating credible characters or perhaps evoking the atmosphere of a sporting event, these stories were sometimes given marks for Content and Structure just into Level 5 but most were Level 4 narratives.

Examiners awarded marks in Level 6 for Content and Structure for narratives which created convincing, interesting scenarios and characters in responses to both questions. While the events in a story were important in creating such credibility, Level 6 responses paid attention to characterisation and how events were driven by character traits, choices and relationships.

Narratives given marks in Level 5 were usually more straightforward in structure and approach but nonetheless cohesive and reasonably credible for the reader. Examiners could award marks in Level 5 for Content and Structure where the narrative was organised and there was a clear attempt to create a developed, relevant story. Responses in this range were more usually chronological accounts but were cohesive and balanced and contained a suitable ending depicting some satisfying resolution. Whichever interpretation was given to the tasks, for Level 5 marks for Content and Structure stories needed to be well-managed with some conscious shaping of the narrative beyond a simple retelling of events.

Level 4 marks for Content and Structure were awarded for stories which were relevant to the task but were less developed and used fewer elements of effective narrative writing. Characters and narrators tended to be more simply drawn and responses were often more dependent on a series of events, lacking attention to characterisation and setting. A simplicity of content or a lack of development rather than ineffective organisation were typical lower in this level. There was a tendency to say simply what happened or to state who the characters were rather than drawing the reader in by characterisation and setting. Characters were identified but there was more time and emphasis given to relating events than developing credible characters. While the majority of less effective narratives had some simple but clear sequence of events, there were fewer features of a developed narrative and the reader was less engaged as a result.

High marks for Style and Accuracy were given for responses where the writing was engaging and varied in vocabulary and where different sentence structures were controlled and used to create particular effects. The characteristics of Level 6 writing included a fluent and flexible use of language which was subtle enough to create a range of effects to engage the reader. Punctuation within sentences, especially in the use of dialogue, was secure in responses in Level 6 and where coupled with a sophisticated and precise range of vocabulary, the highest marks were given.

Responses awarded marks in Level 5 tended to be less ambitious and complex but still mostly accurate while Level 4 responses were plain in style and there was a more limited range of vocabulary. Speech punctuation was almost always problematic at this level although the writing had few serious errors which affected the clarity of meaning, such as ineffective sentence control, sentence separation and grammar

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errors. Moderately common errors of grammar and expression appeared increasingly in responses given low Level 5 and Level 4 marks, such as disagreements, missing articles and imprecise, sometimes over-ambitious vocabulary. Occasionally, the use of obscure, archaic vocabulary, the meaning of which was not well understood, seriously affected the clarity of the writing and resulted in lower marks for both Content and Structure and Style and Accuracy because neither the story as a whole or the meaning of the language was clear.

Errors in sentence control and separation, as well as lapses in tenses, limited otherwise competently told stories to Level 4, as did frequent errors in basic punctuation or grammar. The omission of definite and indefinite articles, the incorrect use of participles or errors in grammatical agreement contributed to a lack of fluency and accuracy which kept many responses out of Level 5. Similarly, basic punctuation errors and the misspelling of simple words and wrongly selected homophones sometimes appeared in otherwise competent writing and were sometimes frequent enough to affect the mark for Style and Accuracy. A common reason for keeping an otherwise clearly written story out of Level 5 was ineffective demarcation of sentences, most commonly the use of commas where full stops were needed but sometimes sentence separation was missing altogether. Though the mixing of tenses and the use of incomplete sentences were more prevalent in the descriptive writing, these issues also limited the marks available in the narrative writing.

Ways in which the writing of narratives can be improved:

- choose your plot carefully so you have time to develop characters and settings
- consider imaginative ways and points of view to tell your story, not just a chronological account
- characters' thoughts and feelings help to engage your reader: do not rely on actions
- check your writing for errors which will badly affect your mark, such as basic spelling and punctuation mistakes: only use incomplete sentences when you want to create a specific effect
- use complicated vocabulary only with precision and consider the power of simple words and sentences to create particular effects.

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FIRST LANGUAGE ENGLISH

Paper 0500/22
Directed Writing and Composition

Key messages

This paper was mainly assessed for writing, although there were fifteen marks available for reading in **Question 1**.

In order to achieve high marks, candidates were required to:

- use an appropriate form, style and register in both questions
- structure ideas and organise their writing effectively to persuade and engage the reader
- produce detailed and evocative descriptions and engaging, credible narratives
- understand how different audiences, purposes and genres should influence the style adopted
- construct varied sentences accurately, with a clear attempt to influence and interest the reader
- use precise and wide-ranging vocabulary, appropriate for the task.

General comments

Candidates were familiar with the format of the examination paper and understood what was required for both the directed writing and composition questions. Nearly all candidates understood the instructions for the examination and attempted **Question 1** and either a descriptive or narrative writing task, with very few rubric infringements seen. A small number of candidates did not attempt **Question 1** but wrote relatively competent responses to one of the composition questions. Most responses were written in candidates' own words although there were a few responses which were mostly or wholly copied from the texts in the Reading Booklet Insert. Some lifting of phrases or sentences was fairly common but where this lifting of material was more extensive, marks were inevitably limited for both Reading and Writing. In ***Section B***, most candidates understood how the content of descriptive and narrative writing differs, although there were some stories and occasionally discursive or polemical pieces submitted for the descriptive writing tasks, which made it difficult for examiners to award high marks for Content and Structure.

Nearly all responses showed a clear understanding of and engagement with the topic of the desirability or otherwise of redesigning a neighbourhood into a 'city village' in **Question 1**. Most responses were written in an appropriate style and format for a formal letter to a city authority. The register required here was generally well understood, with a businesslike and persuasive tone and the use of some stylistic devices, although some responses used phrases which were inappropriately colloquial.

The majority of candidates approached the topic using their own words rather than excessively lifting or copying the words in the passages. More effective answers here also tended to structure responses independently, selecting and commenting on or employing the ideas in the texts in a coherent response. Even in responses which offered only limited coverage of the ideas in the reading material, some opinion or recommendation was usually given about whether or not such a major change was desirable or workable, as given in the task, though not always probing or offering judgements about the ideas: only a very small minority simply reported the views and ideas in the texts with no comment whatsoever on them. More effective evaluation tended to challenge some ideas in the texts rather than reproduce them and also develop them thoughtfully to consider the impact on different groups of people.

Less effective responses tended to repeat the ideas in the texts, rather than selecting points and commenting on them. Here salient ideas in the texts were not fully addressed, such as the morality or practicality of enforcing radical change to a settled neighbourhood. A number of responses at different levels of writing skills focused on the requirements of the first bullet point in the task, thus missing important evaluation opportunities offered by the second.

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Most candidates made good use of the bullet points in the question to help structure the response, and the ideas in the texts were scrutinised thoughtfully in more effective responses. Less effective responses were sometimes little more than a summary in paraphrase of the two passages in the Reading Insert. The structure and organisation of ideas required in a letter, such as a focused and explanatory opening and a thoughtful and convincing conclusion, were well understood by many candidates, though there were also responses which were relatively flat and discursive in style after a brief introduction.

In ***Section B***, effective responses to the composition questions were characterised by a clear understanding of the genre selected, descriptive or narrative, and of the features of good writing in each. In this examination session the narrative and descriptive options were almost equally popular.

Descriptive writing at the highest level was evocative and subtle and most responses gave a range of descriptive detail without resorting to narrative. Many responses to the descriptive writing questions were effective, organised and sustained. The first question was slightly the less popular but produced responses across the mark range. In response to this option there were some many convincing evocations of moments of tension in a competitive situation, and while the chosen scenario was most frequently that of a sports competition or match, written in the first person, there were also effective descriptions set in chess games, dance competitions, online gaming and drama auditions: a few candidates made the best of their own situation by convincingly representing the anxiety of 'freezing' during an academic examination.

Less effective responses to this question were less likely to focus tightly on the moment but covered longer periods of time and activity in the match or competition, almost inevitably drifting into narrative, although Examiners rewarded description where they found it. Responses to the second descriptive option resulted in some highly effective and sophisticated depictions of artists of different kinds. Most were of painters, but also featured were sculptors, musicians and composers, dancers and couturiers. At various levels of achievement a more metaphorical approach was taken, with God or Nature being the artist. Some of these were most engaging, evocative and well-structured. A small number of responses were biographical pieces about well-known artists or discursive pieces about the nature of art. These offered assessment challenges to examiners but they rewarded descriptive content where they could.

The first narrative option was less popular than the second, but both produced responses across the range of abilities. In response to **Question 4** a large proportion of narratives involved excursions of different types, difficult hikes with school or college friends, and a considerable number of attempts to conquer Everest or K2. There were also journeys of growth or self-realisation. Less effective responses were often accounts of family holidays or lists of events and places encountered on their travels. In response to the second narrative option the idea of the 'switch' had sometimes only the most limited or almost incidental significance. Many narratives, at varying levels of achievement, were based on an actual, physical switch, while others involved stories of switching events and attitudes to alter one's life path or progress. Those using the former approach produced many narratives of transportation to other worlds, or the finding of treasure. Often there were stories where bodies or personalities were switched, with frightening or humorous results: these were sometimes clearly derived from well-known movie franchises. Responses to both questions which were coherently constructed and which included credible characters and scenarios were always more effective. Less effective responses to both questions were over-packed with incident succeeded by an ambiguous or abrupt ending. Some highly effective responses created tension and pace, supporting the narrative detail with the deliberate manipulation of paragraph- and sentence length for effect.

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Comments on specific questions

Section A

Question 1

Imagine you live in a city which is considering redesigning your neighbourhood.

Write a letter to the city authorities, giving your views on the proposal to create a 'city village'.

In your article you should:

- **evaluate the ideas, attitudes and opinions given in both texts**
- **consider whether or not the proposal is desirable or workable and whether or not it will benefit different people in the community.**

Base your article on what you have read in both texts, but be careful to use your own words. Address both of the bullet points.

Write about 250 to 350 words.

Up to 15 marks are available for the content of your answer and up to 25 marks for the quality of your writing.

Examiners awarded high marks for Reading where there was some probing and evaluation of the ideas in the reading material, rather than a straightforward listing and reproduction of the points in the texts. Where the letter was also accurate and precise in vocabulary, with a clear understanding of the appropriate style and register for the specific task and audience, the highest marks for Writing could be awarded. More effective responses here focused carefully on the arguments in the texts, with the highest marks awarded for those which handled the different, often conflicting views with confidence and perceptive evaluation. The extent to which the implicit ideas and opinions contained in the texts were probed and scrutinised tended to determine the level of candidates' achievement.

Marks for reading

The most effective responses adopted a consistently evaluative, critical stance and read effectively between the lines of the texts, drawing inferences and making judgements about the desirability or workability of such radical change to city layout and planning. Responses given marks in Level 5 and 6 effectively challenged the outright banning of polluting vehicles, forcing people including the old and the disabled to walk or cycle in possibly tropical heat or monsoon rain, the assumptions of designers that all residents would welcome or at least tolerate the massive disruption that major demolition and rebuilding would surely bring, and the idea that most people would value living in the type of community where, 'everyone knows your business'. Some very thoughtful responses given marks in Level 6 stood back from the minutiae of the proposal to look at the concept as a whole: 'What right have the city authorities and the designers –no doubt from outside – to determine how we should live? However 'convenient', they will create ghettoes which restrict freedom and cultural growth.'

Elsewhere effectively argued responses challenged the notion of 'minimal travel' in Text A: 'You might say that having all services close by would be helpful in an emergency, but are you really suggesting that a fully equipped and staffed major trauma centre will be provided in every neighbourhood? Will factories and industrial units be placed in every area so that workers can walk to their employment? I think not!'. There were a number of responses which managed to synthesise ideas from both texts to craft a fully developed response in the form of a letter, offering a range of evaluative points, and these could be awarded marks for Reading in Level 6 or high in Level 5. These showed a mature and thorough grasp of the subtleties of the issues involved. Where even a single evaluative point was firmly made examiners could award marks at the bottom of Level 5 if there was otherwise reasonable coverage of the reading material. Where coverage was more extensive and more evaluative points were made the response could move up the mark range in this Level. Examiners noted an increase in this examination series of brief responses which precluded the awarding of marks in Level 5 or above because they were not 'thorough' or 'developed' responses as required by the Mark Scheme, but where some comment on or development of key ideas in the texts was offered examiners could award marks in Level 4. A small number of responses were seen in which one or two points of the proposal were subjected to impressive analytical discussion and development but the

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marks awarded were limited to mid- or lower Level 5, because the range of evaluative points was limited. These responses were often awarded high-level Writing marks.

Where some comment or opinion was offered, sometimes without specific reference to particular points in the texts but generally relevant to the ideas in them, marks at the lower end of Level 4 were usually awarded. These comments usually focused more exclusively on the pragmatic, reproducing some of the benefits of both approaches to the proposal. Examiners noted well-written responses which could not be awarded marks for Reading above Level 3; these sometimes lengthy and thoughtful responses about the importance of community, friendship and tolerance seemed only based on the writer's own experience, with little reference to the task in the question or to the specific ideas in the texts. They were sometimes very accurately written and employed an effective register and so had marks in widely differing Levels for the two components of the question. Where the beginnings of evaluation of explicit points were evident, marks at the top of Level 4 could be awarded, while in undeveloped or brief responses, a mark of 7 at the bottom of Level 4 could be given if a comment had some firm roots in the text.

Examiners usually awarded marks in Level 3 for Reading where there was some coverage of the texts, and some selection of ideas from them, but where these were listed or simply recorded, or comments were relevant but simple. A mark of 5 or 4 was usually given where answers were thin or partly lifted directly from the texts. Often, there was a clear paraphrase of both texts but little comment on them. Where there were some brief opinions, usually at the end of the response, they tended to be more general and not strongly anchored in the specific ideas in the texts. There was also sometimes, at this level, misunderstanding of some details in the texts or an unbalanced grasp of ideas: some understanding of the writer's perspective in Text A was evident, but little or no reference was made to the ideas in Text B. These responses were sometimes muddled but also opportunities for evaluation were lost elsewhere because responses were limited to asserting that the redesigning of the neighbourhood should or should not go ahead, without relevant support from the texts or development with the writer's own ideas.

Less effective responses tended simply to paraphrase and list ideas and many given marks in low Level 3 and below contained much copied material. Some candidates neglected the direction in the task about considering different people in the community, thus missing many evaluation opportunities. Examiners also noted a marked degree of confusion about the proposal itself, perhaps arising from an imperfect grasp of the task: responses argued for or against the conversion of the whole city into a village or wrote about their rural home villages being made into cities.

Marks for Writing

Style and audience

Candidates needed to adopt an appropriate style and register for a letter to city authorities, whose specific concerns and points of view could be imagined or understood. Most responses showed a clear understanding of the required register, even where technical writing skills were ineffective, and this allowed Examiners to consider marks in Level 4 and above where a 'sometimes effective style' was required. At all levels of achievement having a distinct point of view supported the effectiveness of the writing because it could become impassioned and highly persuasive.

In the middle range of marks, examiners could sometimes award marks in Level 4 even where more technical skills were lacking if the style and register adopted were appropriate for the task and audience. These often maintained an effective register without resorting to the overly colloquial slang and even expletives of a few responses. In these, expressions such as, 'gonna' and, 'you guys' or overly loose sentence structures were used which were not appropriate for a response in the context of an examination where a range of writing skills is assessed. A small but significant minority wrote as if the proposal to redesign the neighbourhood was entirely their own idea which they were presenting to the city authorities: some were still able to develop and evaluate points from that perspective but for most it hampered the creation of a coherent response.

Level 3 marks were usually awarded where the reading material was largely reproduced so that the organisation and sequence of sentences and paragraphs reflected the original and were not adapted to create a coherent style or argument. Where the reading material was heavily lifted or copied, there was often little of the candidate's own style for examiners to reward, though this kind of response was rare. More commonly, phrases and sentences were lifted and increasingly so as the response developed. In a small number of responses lengthy quotes from the texts were supplied; that inverted commas were used did not disguise the fact that too much of the response was not the candidate's own writing. At the lower level, awkward paraphrasing was seen with syntactically incorrect insertion of phrases from the text. In this

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examination session several instances of inappropriate reference to 'Text A' and 'Text B' which would negatively affect the register were seen, although rather less so than in previous sessions.

Structure

Responses awarded high marks for Writing handled the material confidently and presented their arguments cogently. The issues addressed were combined so that the judgements which emerged were clearly derived from the ideas in the texts but the response was not dependent on them for its structure and sequence. At the highest level, the lines of argument were set from the first paragraph and the issues in the two texts were addressed but as a cohesive piece. The opening and concluding sections of the most effective responses, apart from the rhetorical flourishes or salutations, tended to introduce and sum up the main points, with the intervening sections arguing a coherent case. The point of view being developed determined the sequence of ideas in these responses rather than their sequence in the original texts.

Responses given Level 5 marks for Writing tended to reflect a range of points made in each text but were reordered in a response which was sensibly structured and paragraphed and usually avoided the repetition of similar ideas which appeared in both. An overall coherence and structure were required for this Level which was usually less evident in responses below Level 5.

Less effective responses sometimes struggled to provide coherent judgement or recommendation and were more dependent on the sequencing of the original texts. In most cases the information given in the texts was offered with some rewording but not reordering of ideas. While some brief opinion was sometimes given at the end of the response, these views were imposed on the structure of the original texts rather than argued for, and a concluding recommendation was often in apparent contradiction to the weight of selected points preceding it. It was not unusual to see responses which set out all the possible benefits and advantages of a city village, but concluded, 'So leave our neighbourhood alone -we like it as it is', or some similar exhortation. Some less effective responses were very long and involved a considerable amount of repetition; introductory paragraphs were often very laboured and artificial: they sometimes reworded the whole task and promised the recipients to reveal all the results of their research on the subject. At a similar level, conclusions often summarised all that had gone before in a very laborious, repetitive manner.

Accuracy

Accomplished writing which was accurate and controlled as well as appropriate in tone and register was given a Writing mark in Level 6. These responses were not only engaging in style and convincing in their deliberations but fluent and virtually free of error. There was a range of precisely selected and complex vocabulary and sentence structures were varied and consciously used to persuade the reader.

Some complex sentence structures were chosen which helped to balance and weigh up contending views, and complex clauses were controlled by careful punctuation within sentences.

Level 5 responses were usually purposeful and clear, though perhaps not as ambitious and wide ranging in vocabulary or as precise in register or style as those given higher marks. Level 4 responses, as described in the marking guidelines, were 'sometimes effective' but not consistently so. Although the style was usually fairly plain, the language used was generally precise. A range of relatively basic errors was made at this level which limited the effectiveness of the style but did not affect clarity of meaning. There was some grammatical mis-agreement, often between plurals and verb forms. Words commonly misspelt in this range included 'environment', 'convenient/convenience', 'amenities', 'business', 'benefit', 'society' and 'accessible'. Faulty sentence structures, fluctuating tense use or too much lifted or copied material often kept Writing marks for Question 1 below Level 4. These responses often showed reasonable clarity in conveying meaning but there was a wide range of relatively basic punctuation and grammar errors which meant that examiners could not award marks in Level 4. Here, the omission of definite or indefinite articles was relatively common, as were tense errors, and agreement errors were more frequent and more damaging to meaning at this level. In rare cases, material from the texts was copied and responses where this occurred more substantially could not be given marks in Level 4 for Writing or for Reading because neither the content nor the style of the response was the candidate's own.

In this examination session examiners noted a reduction in the random use of capital letters, with only the very occasional response written wholly in capital letters.

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Ways in which this type of answer could be improved:

- be prepared to challenge the ideas in the reading texts
- look for contradictions in the arguments and point them out
- group ideas from both texts together and discuss them rather than repeat them
- think carefully about the kind of style which suits your task and the audience
- ensure that you understand the specific focus of the question to avoid misinterpretation or 'drifting'
- check your writing for basic punctuation errors, such as missing definite or indefinite articles, ineffective control of grammar, or misspellings of key words, which are in the passages or given in the task
- do not lose marks by using capital letters randomly.

Descriptive writing

Describe a tense moment during a competition.

Write a description with the title, 'The artist'.

Descriptive Writing was a very popular choice for candidates, with **Question 3** being chosen rather more often, and examiners could award a wide range of marks for these responses. Both questions were interpreted in a variety of ways which examiners could reward appropriately. In the first task, there were many detailed, organised and effective descriptions of anxious moments in a range of situations, although the dominant scenario was that of sporting competitions, often international football or basketball matches. There were highly engaging evocations of critical points in the competition or the player's personal career. Where these responses eschewed narrative beyond that strictly necessary for context, and included original and convincing details and images, examiners could award marks in Level 6. Some of the most effective descriptions for **Question 2** summoned up crucial moments in chess tournaments, using images of sound and almost monochrome visual details, or conveyed the mental stress of the competitor which could not be alleviated by physical movement: 'He dug the heels of his palms into his eye sockets in a frantic attempt to calm his trepidated self.'

Descriptions, as is always the case, were more effective if they contained vivid and specific details rather than more general or stereotypical ideas and images. In the middle and lower ranges of achievement writers depended more on visual or stereotypical images: 'He ran faster than a cheetah'; 'The goalkeeper saved the ball like a lion pouncing on its prey'; 'The crowd roared.' In responses to the second question, a substantial number depicted painters, either in a studio or outside painting a landscape. The painting itself often became the main focus of the description rather than the artist, but images were often so convincing and evocative that examiners were able to award high marks for content and structure. Although the subject lent itself primarily to visual imagery including the resonant names of oil colours, tactile and olfactory images were also effectively employed: 'She ran her fingers over the thickly ridged impasto created by his palette knife….'; 'Instinctively she poured linseed oil that spat out a potent odour and diffused quickly through the room.'

For both descriptive writing questions, unusual, closely observed details created convincing, evocative scenes and atmospheres in the best responses. Where they were sustained and developed and showed skill in building a detailed, convincing overall picture, examiners could award marks for Content and Structure in Level 6. These consciously crafted pieces held the reader's attention by linking the different elements described in an engaging, cohesive response. Level 6 responses were characterised by this cohesive structure, often provided by the narrator's reactions or attitudes or a specific atmosphere, as well as carefully chosen detail and striking images. When writing in the descriptive genre, candidates often struggle to provide suitable introductions and conclusions, but in response to **Question 2**, at varying levels of accuracy of writing skills, numerous responses began in medias res, perhaps when a penalty shot in a match was imminent or a crucial chess move or ballet step was about to be attempted. Here the backstory was often effectively provided in flashback. Sometimes this effect was reduced by a later slide into overlong narrative. In responses to **Question 3** much less narrative preamble or scene-setting was evident: the writer often came across a painter or performer when turning a street corner, or opening a door into a studio: 'And there he was, utterly oblivious to my presence, his paint-daubed overall hardly distinguishable from the splattered floor around his easel.'

Level 5 responses tended to use a wide range of details with well-managed structures, if a little less effective and cohesive overall. At the bottom of Level 5 and in Level 4, responses were sustained and competently organised but usually more predictable. Selected scenes and details at this level tended to involve less striking images and more stereotypical ideas. In response to **Question 2**, some writers struggled to employ effective structures without resorting to excessive narrative, for example detailing the progress of their

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sporting career which had led to this important competition. Responses awarded marks in Level 4 for Content and Structure generally tended to become more narrative in intent although Examiners rewarded description where it was found. In responses awarded marks in Level 3, there was often some lack of awareness of the essential elements of descriptive writing, even though some were fairly-accurately written. These were sometimes entirely narrative or the details included were mundane and stereotypical: 'The team was all in their red strip and the stadium was packed.' In other responses the scenario of an on-line gaming tournament was employed, and this could be challenging for the non-specialist to understand fully.

The most effective responses employed precise and varied vocabulary, striking images and personification, as well as a range of sentence structures to create subtle, complex atmospheres. In less effective responses, vocabulary was occasionally wide-ranging and complex but used with less precision. In a few cases, this insecure use of language resulted in a style which was difficult to follow and the credit which could be given for a wide-ranging vocabulary was lost by its imprecise use and lack of clarity. Occasionally, obscure, even archaic language sometimes revealed a lack of understanding of its meaning rather than a wide range of vocabulary. In a few responses, there seemed evident a determination to employ a learned corpus of vocabulary, where it was inappropriate or even impaired meaning.

As is often the case in less secure descriptive writing, tenses switched between past and present, sometimes within sentences. Incomplete or verbless sentences continued to affect marks given in the middle range, even where other technical aspects of style were more accurate. Lapses in grammar, perhaps minor in isolation but more damaging when persistent, also kept responses out of Level 4 for Style and Accuracy. These included mis-agreement, especially between pronouns and verbs, and the omission of definite and indefinite articles was also common and damaging to otherwise relatively accurate, if simple, styles.

Ways in which the writing of descriptions can be improved:

- try to avoid clichéd scenarios and consider a more individual and original selection of content: choose a scenario which gives you a range of details on which to focus
- keep your focus on details which will help you evoke a specific atmosphere
- write sentences with proper verbs and do not switch tenses
- use vocabulary precisely: complex words used wrongly do not help your style.

Narrative writing

Write a story which involves an extraordinary journey.

Write a story with the title, 'The switch'.

Narrative writing questions were popular choices for candidates across the mark range, and there was a very wide range of plots, characters and scenarios in these responses, numbers of which were awarded marks in Level 6 for both components of the answer. These most engaging responses often included vivid descriptive detail to create the setting and characters, essential elements of more effective responses to both questions. Examiners sometimes saw narratives which seemed more suited to titles set in previous examinations or were pre-prepared: this was much more apparent in **Question 4**. Occasionally responses were seen which did not comfortably fit with either title, and where some lack of cohesion was evident. Responses awarded marks in Level 5 showed an ability to shape the narrative and to produce moments of tension, mystery or drama and to vary the pace of the story.

In **Question 4**, many responses were accounts of a family holiday or of hiking adventures with friends. Those awarded marks at the top of Level 3 or in lower Level 4 tended to be straightforward chronological accounts, with little or no characterisation or convincing scene-setting. These failed to convince or engage the reader, often because of their unrealistic nature: friends bored during school holidays might decide on a whim to attempt a mountain climb which would deter all but the most experienced mountaineers, and by the next morning were at base camp with no apparent preparation or expertise. At this Level family trips to Disneyland or some exotic location were also seen, often unrelieved by any major incident or development. Level 5 responses revealed a wider range of scenarios, and included journeys of personal growth and development, sometimes poignantly evoking sadness and self-realisation. Another candidate wrote about a journey through the written words of her deceased grandfather's journal, revealing her father's secret life. There were several stories set at the time of the Partition of India, with exhausted refugees attempting journeys in both directions. One of these was awarded marks at the top of Level 6. In careful, spare prose it evoked the loss of home and fear of the future: 'The journey had taken pieces of us: a scarf lost, a prayer whispered, a photo of my father crushed at the last checkpoint.' This recounted not only a harrowing physical

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journey, but also one of personal development, even transformation, as the teenage narrator gradually assumed responsibility for keeping older family members alive: 'I had crossed more than a border that day'. Another response awarded full marks was narrated by an Alzheimer's sufferer. Expertly using internal monologue and flashback techniques, the writer depicted the sufferer's journey through past and present times, ending most movingly with a painful moment of realisation when, believing he was ten years old and playing with his teenage sisters he heard his own aged and roughened voice calling to them. Examiners could reward such responses for their ambition and engagement, even where levels of accuracy were somewhat lower than those for content and structure.

For **Question 5**, there were many different plotlines, characters and events which allowed candidates to show their narrative writing ability, but several themes dominated at all levels of achievement: the discovery of actual switches, the operation of which had often spectacular results such as opening a portal to other worlds; fantasy stories in which bodies or personalities were mysteriously exchanged, leading to many kinds of adventures; pranking stories involving twins, and narratives in which the protagonist underwent some sort of an epiphany which changed the direction of their lives. To achieve high marks for content and structure, such narratives had to demonstrate convincing scene-setting and characterisation, and the creation of drama and tension. At the lower end of Level 5 and in Level 4 responses to **Question 5** fantastic or spectacular events were sometimes presented without any expression of fear or even consternation, as if finding oneself in the body of another was no more surprising than picking up their belongings by mistake; the resulting loss of credibility negatively affected marks for Content and Structure. Sometimes marks in the Level first considered by the examiner for an engaging tale could not be awarded because of ineffective endings or faults in the plot's resolution. This particularly affected some otherwise engaging and convincing responses to Question 4. Examiners noted an emerging trend for an action-packed or fantasy plot to end abruptly with, 'I realised it was all a simulation.' Also seen was an increase in the number of responses –small but significant—which included gratuitous violence or other disturbing material.

Examiners awarded marks in Level 6 for Content and Structure for narratives which created convincing, interesting scenarios and characters in responses to both questions. While the events in a story were important in creating such credibility, Level 6 responses paid careful attention to characterisation and how events are driven by character traits and choices. This was often supported by the skilful employment of both direct and reported speech.

Narratives given marks in Level 5 were usually more straightforward in structure and approach but nonetheless cohesive and reasonably credible for the reader. Examiners could award marks in Level 5 for Content and Structure where the narrative was organised and there was a clear attempt to create a developed, relevant story. Responses in this range were more usually chronological accounts but were cohesive and balanced and contained a suitable ending depicting some satisfying, if not always engaging, resolution. For higher marks for Content and Structure stories needed to be well-managed with some conscious shaping of the narrative beyond a simple retelling of events.

Level 4 marks for Content and Structure were awarded for stories which were relevant to the task but were less developed and used fewer elements of effective narrative writing. Characters and narrators tended to be more simply drawn and responses were often more dependent on a series of events, lacking attention to characterisation and setting. A simplicity of content or a lack of development rather than ineffective organisation were typical at this level: here there was a tendency to say simply what happened or to state who the characters were rather than drawing the reader in by characterisation and setting. Characters were identified but there was more time and emphasis given to relating events than developing characters as credible and rounded. While the majority of less effective narratives had some simple but clear sequence of events, there were fewer features of a developed narrative and the reader was less engaged as a result.

High marks for Style and Accuracy were given for responses where the writing was engaging and varied in vocabulary and where different sentence structures were controlled and used to create particular effects. The characteristics of Level 6 writing included a fluent and flexible use of language which was subtle enough to create a range of effects to engage the reader. Punctuation within sentences, especially in the use of dialogue, was secure in responses in Level 6 and, where this was coupled with a sophisticated and precise range of vocabulary, the highest marks were given. Responses awarded marks in Level 5 tended to be less ambitious and complex but still mostly accurate while Level 4 responses were plain in style and lacked some range in vocabulary. Speech punctuation and paragraphing were usually problematic at this level although the writing had few serious errors which affected the clarity of meaning, such as ineffective sentence control, faulty sentence separation and grammar errors. Some writers resorted to laying out dialogue in the style of a playscript in order to make clear who was speaking. Relatively common errors of grammar and expression appeared increasingly in lower Level 4 responses such as mis-agreements, missing articles and imprecise, sometimes obscure vocabulary. Errors in sentence control and separation, as well as lapses in tenses,

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limited otherwise competently told stories to Level 4, as did frequent errors in basic punctuation or grammar. The omission of definite and indefinite articles, the incorrect use of participles or errors in grammatical agreement contributed to a lack of fluency and accuracy which kept many responses out of Level 5. Similarly, basic punctuation errors and the misspelling of simple words and wrongly selected homophones sometimes appeared in otherwise competent writing and were sometimes frequent enough to affect the mark for Style and Accuracy. A common reason for keeping an otherwise clearly written story out of Level 5 was ineffective demarcation of sentences, most commonly the use of commas where full stops were needed but sometimes sentence separation was missing altogether. Though the mixing of tenses and the use of incomplete sentences were perhaps more prevalent in the descriptive writing, these issues also limited the marks available in the narrative writing. Examiners noted the use of the language of on-line gaming in some responses such as, 'I had a clutch of 1v4', or 'I saw a double holding', which detracted from the reader's appreciation of their content.

Ways in which the writing of narratives can be improved:

- think about how to interest and intrigue the reader in shaping your narrative
- consider imaginative ways to tell your story, apart from a chronological account
- characters' thoughts and feelings help to engage your reader: do not rely only on events
- check your writing for errors which will badly affect your mark, such as basic spelling and punctuation mistakes, taking special care to avoid misspelling words given in the tasks: accurate speech punctuation and paragraphing will help to lift your mark
- use complicated vocabulary with precision and consider the power of simple words and sentences to create particular effects.

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FIRST LANGUAGE ENGLISH

Paper 0500/23
Directed Writing and Composition

Key messages

This paper was mainly assessed for writing, although there were fifteen marks available for reading in **Question 1**.

In order to achieve high marks, candidates were required to:

- use an appropriate form, style and register in both questions
- structure ideas and organise the response effectively to inform, persuade and engage the reader
- to produce detailed and evocative descriptions and engaging, credible narratives that understand the different kinds of content required for description and narration
- construct varied sentences accurately, with a clear attempt to create an effect on the reader
- use precise and wide-ranging vocabulary, appropriate for the task and style required.

General comments

There was a secure understanding by the majority of candidates on how marks were awarded for both tasks, Directed Writing and Composition. There were few very brief scripts or responses. Nearly all candidates understood the instructions for the examination and attempted **Question 1** and either a descriptive or narrative writing task, with very few rubric infringements seen by examiners. In **Question 1**, most responses were written mostly in candidates' own words. There were a few responses which were mostly or wholly copied from the texts in the Reading Booklet Insert, although some lifting of phrases or sentences was fairly common. Where this lifting of material was more extensive, marks were inevitably limited for both Reading and Writing. In **Section B**, most responses showed an understanding of how the content of descriptive and narrative writing differs, although there were narratives submitted for the descriptive writing tasks which made it difficult for examiners to award high marks for Content and Structure.

Nearly all responses showed a clear understanding of and engagement with the topic of the reading texts in **Question 1**. Most responses were written in an appropriate style and format for a letter to a head teacher on whether or not pupils should be allowed to use their mobile phones to take pictures on a school trip. The register required here was well understood, with most responses reflecting the right level of formality required for such an audience. There was in many responses an attempt to persuade a head teacher that the use of mobile phones on a school trip was either desirable or a hindrance to the students appreciating the moment. The majority of responses approached the topic using their own words rather than lifting or copying the words in the passages. More effective answers here also tended to structure responses independently, selecting and commenting on the details in the texts in a coherent response. Some responses were structured by providing clear paragraphing for each section of their letter which was often a helpful way to organise the material for the benefit of the reader. Some opinion was often given as a conclusion to the letter to round it off in a suitable way. The factors for and against the use of mobile phones on the school trip were mostly rooted in the ideas given in the reading texts. In the middle of the mark range, responses tended to reproduce the points made in the texts, sometimes with an opinion given about some of the points made, with some beginning to evaluate the ideas. A substantial number of responses at this range made some comments about the ideas in the texts, though not always probing or offering judgements about them. In many cases, responses developed the idea of using the images from the phones to preserve memories of the school trip, either for themselves, their families or for future generations.

Less effective responses tended to repeat the idea in the texts, rather than selecting points and commenting on them. In some responses at this level there was sometimes a tendency to rephrase the ideas of each text, for instance, moments being fleeting so they have to be preserved so they can move you forever.

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Most candidates made good use of the bullet points in the question to help structure the response and the ideas in the texts were scrutinised thoughtfully in more effective responses. The images taken on mobile phones teaching us to see the beauty of the world and to appreciate it was often effectively evaluated. Less effective responses sometimes showed limited awareness of the specific audience for the article, the head teacher at a school, providing a summary of the ideas in the texts but without the focus of giving their views on whether or not using cameras on a school trip was desirable. Overall, however, there was often a clear adaptation of style and register for the given task. The introduction to the letter, clearly stating the letter's purpose, and the conclusion summarising the main points and expressing any desired actions, along with the structure and organisation of ideas required in a letter were well understood in the majority of the responses. In general most responses showed an ability to maintain an appropriate style and register for a letter with evidence of awareness regarding the purpose of the letter and the intended audience.

In **Section B**, effective responses to the composition questions were characterised by a clear understanding of the genre selected, descriptive or narrative, and of the features of good writing in each.

Descriptive writing at the highest level was evocative and subtle and most responses gave a range of descriptive detail without resorting to narrative. Many responses to the descriptive writing questions were very effective and sustained. There were some imaginative descriptions of an uncomfortable ride on public transport, whether it was a bus, train or other mode of transport. Some descriptions of a person working outdoors were engaging and effective. A wide range of approaches and scenarios was employed in these tasks, with some highly effective and detailed descriptions of the uncomfortable ride, how the observer reacted to being there and what they felt and imagined about their surroundings. Less effective responses to this question tended to become more narrative, for instance describing why the journey was taking place, or the details given were relatively clichéd or stereotypical. For the second question, there was a wide range of descriptions of the outdoor worker and their surroundings. More effective responses were able to develop intricate details of the worker, how they felt, what they looked like, with some effective description of the place and surroundings they were working in. Less effective responses sometimes lacked descriptive details and tended to have less organised ideas; for example, some descriptions just described the worker's tasks without reference to the surroundings or the worker them self.

Both narrative questions elicited a very wide range of approaches and interpretations and examiners awarded marks across the range here. Effective and engaging responses to the first question, a story that involved making a new friendship, had effectively developed plots, their characterisation was convincing and the climax to the plot was well managed. Less effective pieces tended to include more obvious or more mundane events or, conversely, a series of unlikely actions in responses which paid limited attention to characterisation and setting. While some included ordinary events, other less effective narratives were less credible or were under-developed in style and less cohesive in structure. The story with the title 'The last one,' was often effectively written whether it was a fictional narration or the candidates' own experience.

Some composition responses would have benefited from a clearer grasp of the features of good writing in specific genres. The best descriptive writing was specific, used some original and thought-provoking imagery and effectively evoked the atmosphere of the place or the thoughts and feelings evoked by the objects described. The conscious shaping of narratives to interest and intrigue the reader and the creation of credible characters were features understood by the most effective writers who chose narrative writing options. The tendency for descriptive writing questions to be answered by straightforward narratives with limited descriptive detail was noted by examiners, sometimes in responses where the writing was accurate and relatively fluent.

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Comments on specific questions

Section A: Directed writing

Question 1

Your school has organised a visit to an area of great natural beauty. To appreciate the experience more fully, the head teacher has decided that students will only be allowed access to their mobile phones in an emergency, not to take pictures.

Write a letter to the head teacher giving your views on this decision.

In your letter, you should:
- **evaluate the ideas, attitudes and opinions given in the texts**
- **consider whether the experience will be more rewarding with or without the ability to take pictures.**

Base your letter on what you have read in both texts, but be careful to use your own words. Address both of the bullet points.

Write about 250 to 350 words.

Up to 15 marks are available for the content of your answer, and up to 25 marks for the quality of your writing.

Examiners awarded high marks for Reading where there was some probing and evaluation of the ideas in the reading material, rather than a straightforward listing and reproduction of the points in the texts. Where the letter was also both accurate and ambitious in vocabulary and style, with a clear understanding of the appropriate style and register for the specific task and audience, the highest marks for Writing could be awarded. More effective responses here focused carefully on the arguments in the texts, with the highest marks awarded for those which handled the different ideas within the two texts with confidence and perceptive evaluation. The extent to which the implicit ideas and opinions contained in the texts were probed and scrutinised tended to determine the level of achievement for the response. These implicit ideas often involved the discussion of how, photographs preserved memories, had a sense of nostalgia and allowed these memories to be shared with others in the future. While most responses offered some ideas on how cameras captured special moments using the explicit ideas from the texts there was often a limited evaluation of these ideas implicitly. These responses often tended to take the form of a list of details the camera could capture, or a list of reasons on why students should or should not be allowed to use their cameras on the school trip

The range and number of different ideas in the two texts required some organisation and selection for the higher Levels in both Reading and Writing. An ability to assimilate the ideas from the two texts was shown in some responses. In Text B for example, the idea that we should remember significant moments without photographing them, was assimilated with the ideas from the material in Text A that memories are unreliable but photographs will faithfully preserve the moment.

In responses given marks in Level 5 and above for Reading, examiners often rewarded some careful grasp of the implications suggested by the texts, selecting relevant ideas and integrating them into their responses. For example, some responses discussed the use of the camera as a creative tool to take images which could be inspirational to others, that photography was a form of art that could ultimately lead to a career.

Most effective responses were often those that did not simply list the points for and against the use of mobile phones to take photographs but engaged with the passage by evaluating the material, inferring and expanding upon their ideas and offering inferences relating to the wider picture. For example, the long-term benefits of preserving images as opposed to the benefits of being able to enjoy the moment and appreciate it without the use of a camera.

Marks for reading

As always, the most effective responses adopted a consistently evaluative, critical stance and read effectively between the lines of the texts, drawing inferences and making judgements about being able to

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access mobile phones to take pictures and whether the experience would be more or less rewarding with the ability to take pictures.

Most responses included the reference in Text A to the fact that photographs were desirable as they preserved the moment enabling you to relive it and be moved by it forever. More thoughtful responses considered carefully the advantages and disadvantages of taking pictures, whether it was a better way of appreciating the beauty of the world than just being there in the moment. Some responses pointed out the fact that memories were unreliable so therefore they needed some way to preserve that moment and that the best way was by a digital image.

Others took the opposite viewpoint and argued that a photograph only took seconds to take and therefore did not detract from the moment. Responses that were awarded marks in Level 5 or 6 for Reading used a broad canvas of ideas that effectively evaluated the passages. These included ideas such as images can inspire others, foster creativity, and are a form of art. Some argued that reality as seen through a camera lens was often distorted and how this could be used by individuals to enhance their online image, discussing whether or not this was desirable.

In some highly rewarded responses, a wide range of ideas was developed and evaluated, both from the point of view of the desirability of taking photos and their drawbacks and these were able to make persuasive arguments and judgements about the factors to consider for letting students use the phones to take photographs. These included ideas such as photographs helping to cement shared memories with other people, the ability to learn from past images, and the sense of nostalgia these images evoked. Some candidates argued that digital image making was just as valuable as printed photos and their phone was their photograph album. Other candidates took the opposite stance that screen images did not have the same value as printed images. Also, the idea that the photograph should not be used online to enhance their image or compete with others was often effectively developed and evaluated both from the point of view of there being nothing wrong with this and the point of view of its undesirability.

Relatively few candidates developed the ideas about how photography could form an opportunity for creative growth for students. For instance, how it could motivate them allowing the schools to benefit from their art displays of their photography, which could be inspirational for other students. They did not develop how it was often easier to show friends or family a picture than to describe it in words so they too could share in the experience of the trip. More could have been said about the search for external validation on internet platforms such as Face book and Snap Chat and whether the photographers were more interested in the views of their audience rather than living the moment themselves.

Where some comment or opinion was offered, mostly without specific reference to particular points in the texts but generally relevant to the ideas in them, marks in Level 4 were usually awarded. Most candidates picked up on the most obvious points about photographs being a way to express yourself and to relive memories in the future but these ideas were used explicitly without probing or exploring them in depth. These responses sometimes developed the ideas effectively fully but did not evaluate the implicit ideas from either of the texts. Level 4 responses tended to have a large number of reproduced points, especially from Text A which was often referred to more than Text B, which was about how photography had changed. Some prefaced these ideas with the phrase ‘in an article written by a professional photographer I read it said that ...’ followed by a reproduction of the ideas. Although these ideas were relevant, they were rarely evaluated in any depth.
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Examiners usually awarded marks in Level 3 for Reading where there was adequate breadth of coverage of the texts, and some selection of ideas from them, but without the more implicit meanings mentioned above or with less scrutiny of the points made in the passages. Often, there was a clear paraphrase of both texts but limited comment on the ideas in them. Where there were some brief opinions, usually at the end of the response, they tended to be general comments on why the Headmaster should allow the students to bring their phones on the school trip which were not effectively anchored in the specific ideas in the texts.

Comments made at this level were given mostly in the candidates’ own words. Less effective responses tended to paraphrase and list ideas and many given marks in low Level 3 and below contained much copied material. Copying of phrases was also relatively common, especially ‘The camera is there to preserve that moment so that it can live and move you forever’ and ‘These are the images that tell your story’. While there was generally a good understanding of the passages there was some misunderstanding of expressions such as ‘experience enhanced by photographs is a kind of consumerism to which we are now addicted’, and the digital revolution ‘unleashed’ in recent years, but on the whole the reading of the passage showed a clear understanding both of the passage and the task. Occasionally there was some misreading of the task and candidates wrote an article instead of a letter, but this was relatively uncommon. Where a mark of 6 was

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awarded, some firmer links with the passages were needed, whereas 5 was generally given for thin or mainly lifted responses in which there was some insecure grasp of the ideas in the passage. Those responses that showed no evidence of using the given texts and were very general in nature could not go beyond a Level 2 in the Reading mark.

Marks for writing

25 marks were available for style and register, the structure of the answer and the technical accuracy of spelling, punctuation and grammar.

Style and audience

Candidates needed to adopt an appropriate style and register for a letter to a Head teacher. Most responses showed a clear understanding of this required register, even where technical writing skills were ineffective, and this allowed examiners to consider marks for Level 4 and above where a 'sometimes effective style' was required. Although not always sustained, many articles began with a suitable introduction, outlining their points on the topic of access to mobile phones to take photographs during the school trip. Most responses were organised in paragraphs, which were sometimes helpful to the organisation of the ideas. Some high scoring responses used a more formal style, presenting their arguments in a methodical and structured way but making their case effectively and with some impact, while consistently adopting a suitable tone for a letter to a head teacher. These letters were moderately authoritative and consistently paid attention to both the purpose and audience for the letter.

In the middle range of marks examiners could sometimes award marks in Level 4, even where more technical writing skills were lacking, if the style and register adopted were appropriate for the task and the audience. A clear, consistent attempt to engage and inform the reader of the letter could sometimes compensate for other elements of style such as incorrect spelling or insecure grammar. Conversely, some responses which were generally accurate read like summaries of the reading material rather than a letter with a specific audience. In these cases, while letters often began appropriately, with a suitable introduction to the topic, there was limited awareness of the style appropriate for a formal letter. One response, for example, began the letter with 'I understand where you are coming from ...', without a suitable salutation or introduction to the letter. This showed a limited sense of audience and awareness of the purpose of the letter. A small minority of responses used quotations from the passage which were often not appropriate as the audience would not know where they were quoting from. Some used quotations more sensibly by explaining where this information was coming from, such as 'An article I read recently written by a professional photographer stated that …' This was a more suitable way of using the material rather than stating 'In text A it says that ...' Occasionally a more colloquial, less formal style and language crept into responses, which created a somewhat jarring tone for the task and audience. Expressions such as 'I get where you are coming from,' 'I am sending this letter to tell you,' or 'if we are not gonna have our phones,' affected the overall appropriateness of the register and sometimes limited the marks. Too colloquial a style can be inappropriate for an examination response.

Level 3 marks were usually awarded where the reading material was largely reproduced so that the organisation and sequence of sentences and paragraphs reflected the original and were not adapted to create a coherent letter. A minority of the responses lifted material directly from the passage which could not be credited even if this was presented in quotation marks. There were very few responses which were wholly lifted from the reading material.

Structure

Responses awarded high marks for Writing handled the material confidently and presented their arguments cogently. The issues addressed were combined so that the judgements which emerged were clearly derived from the ideas in the texts but the response was not dependent on them for its structure and sequence. At the highest level, the lines of argument were set from the first paragraph and the issues in the two texts were addressed but as a whole. The opening and concluding paragraphs of these effective responses tended to introduce and sum up the main points, with the intervening sections arguing a coherent case. The argument being pursued determined the sequence of ideas in these responses rather than the sequence of the original texts.

Responses given Level 5 marks and above for Writing tended to reflect a range of points made in each text but were reordered in a response which was sensibly structured and paragraphed. This often avoided the repetition of similar ideas, such as the idea of the best way to preserve a special moment whether by camera or with the mind's eye which was developed in both texts. An overall coherence and structure were required

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for this level which was usually less evident in responses below Level 5. These responses were generally well structured, although sometimes a lack of paragraphs meant that ideas were not grouped effectively or coherently organised.

Less effective responses sometimes struggled to provide a coherent argument and were more tied to the sequencing of the texts. In most cases the information given in the texts was offered with some rewording but not reordering of ideas. While some brief opinion was sometimes given at the end of the response, these views were imposed on the structure of the original texts rather than argued for throughout the letter. Sometimes at this level the response was too brief, which limited the marks that could be awarded.

Accuracy

Accomplished writing which was accurate and controlled as well as appropriate in tone and register was given a writing mark in Level 6. These responses were not only authoritative in style and convincing in their arguments but fluent and virtually free of error. There was a range of precisely selected and complex vocabulary and sentence structures varied and were consciously used, often rhetorically, to engage the reader. Some complex sentences structures were chosen which helped to balance and weigh up contending views and complex clauses were controlled by careful punctuation within sentences.

Level 5 responses were usually purposeful and clear, though perhaps not as ambitious and wide ranging in vocabulary or as precise in register or style as those given higher marks. Level 4 responses, as described in the marking guidelines, were 'sometimes effective' but not consistently so. Although the style was usually fairly plain, the language used was apt and generally accurate. A range of basic errors was made at this level which limited the effectiveness of the style but did not affect clarity of meaning. There were occasional lapses in the use of definite and indefinite articles (usually omission) and some grammatical disagreement, often between plurals and verb forms. There was often some confusion when to use 'it' and 'it's' as well as common spelling errors in this range including 'access', 'opinion', 'decision', 'recommend', 'believe', 'appreciate' and other words, some of which were used in the texts.

Faulty sentence structures, fluctuating tense use or too much lifted or copied material often kept writing marks for **Question 1** below Level 4. These responses often showed reasonable clarity in conveying meaning but there was a wide range of basic punctuation and grammar errors which meant that examiners could not award marks in Level 4. The omission of definite or indefinite articles was very common, as were tense errors, and agreement errors were more frequent and more damaging to meaning at this level. In rare cases, material from the texts was copied and responses where this occurred more substantially could not be given marks in Level 4 for Writing or for Reading because neither the content nor the style of the response was the candidate's own.

Ways in which this type of answer could be improved:

- be prepared to challenge the ideas in the reading texts
- look for ideas in the texts that you disagree with and explain why
- group ideas from both texts together and discuss them rather than repeat them
- think carefully about the kind of style which suits your task and the audience
- check your writing for basic punctuation errors, such as missing definite or indefinite articles, ineffective grammar or misspellings of key words which are in the passage.

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Section B: Composition

Descriptive writing

Describe an uncomfortable ride on public transport.

Describe someone working outdoors.

Both descriptive writing questions were popular choices, especially the description of the uncomfortable ride on public transport. Examiners awarded a wide range of marks for these responses. Both questions were interpreted in a wide variety of ways which examiners could reward appropriately. In the first task, various journeys were described on buses, trains, underground transport and sometimes boats. In the second task, a range of different outdoor workers were described, from gardeners, artists, and construction workers to oil rig workers and farmers.

Responses were more effective if they contained vivid and specific details rather than more general or stereotypical ideas and images. Most responses were relevant to the topic although some were a little generalised and lacked specific detail, or the detail was sometimes generic rather than specific and sometimes lacked relevance to the topic.

In highly rewarded responses to the first question, an ability to effectively engage the reader was shown. The uncomfortable ride was described with many effective and sensory images. One response, for instance, was a very convincing description of an underground subway with many developed ideas, for instance being full to the brim of people struggling to get to their destination, and the overwhelming smell of oxidised metal from the old vehicle. Another effective response described the journey writing in the third person, describing her discomfort as she gripped the sticky metallic pole desperately searching for an unoccupied seat, and her final relief at being able to emerge into the busy streets and humid air of the city; this response described the journey in intricate detail linking the descriptions into an integrated response. There were also descriptions of dilapidated old buses, crowded trains, including a tightly packed bullet train on a very hot day. Effective descriptions used a wide, varied and well-chosen vocabulary.

Some effective responses to the second question were able to vividly describe the outdoor worker, their appearance, their attire and their thoughts and feelings as they performed their tasks. A wide range of vocabulary was often used with some precision to do this. Some responses described workers such as gardeners, working outside, how they for instance carefully tended their plants, the terrain they worked in, their clothes and their rugged appearance from years spent outside. One candidate described a girl working in an outside café, in Paris, as she deftly moved between the tables the soft smile on her face never fading. Some responses also focused on the surrounding environment, such as for instance, someone working on a farm with the green crops contrasting to the dark brown soil and the stench of fertiliser filling the air.

Many responses were able to create a convincing and detailed overall picture. These were able to utilise varieties of focus to provide a well-balanced and secure structure and the descriptions were effective and engaging.

In both descriptive writing questions, unusual, closely observed details created convincing, evocative scenes in the best responses. Most were sustained and developed and at the highest level showed skill in building a detailed scene. These consciously crafted pieces held the reader's attention by linking the different elements described in an engaging, cohesive response. Level 6 responses were characterised by this cohesive structure as well as carefully chosen detail and striking images.

Level 5 responses tended to use a wide range of details and were well-constructed, if a little less effective and cohesive overall. At the bottom of Level 5 and in Level 4, responses were sustained and competently organised but usually more predictable. Selected scenes and details at this level tended to involve less striking images and more stereotypical ideas. These responses to **Question 2** tended to focus generally on how uncomfortable the journey was, the reason for the journey, and their thoughts and feelings when reaching the new destination. These descriptions included some general observations of the vehicle they were travelling in or the type of people that were accompanying them on the journey. The responses sometimes lacked the subtle details provided in more effective responses to make descriptions engaging for the reader. They were, however, adequately structured, with some range of vocabulary.

Level 4 responses tended towards a more narrative style, such as for **Question 3**, a first-person description of a day working as a gardener, or **Question 2** having to make a journey on public transport to reach a certain destination on time. These descriptions did develop images and details of what was seen or felt with

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some precision but they lacked the attention to detail of more effective responses and there was less variety of ideas and images.

Less effective responses given marks in Level 3 or below often included less well organised lists of details briefly given rather than developed. Level 3 responses often resorted to a narrative style with few descriptive details and little cohesion in the structure. Sometimes responses were brief or lacked structure and organisation. Vocabulary tended to be simple in range and lacked some precision. Responses often lacked descriptive details and tended to have less organised ideas, such as using the idea of a trip on public transport as the basis for a narrative rather than developing any images. They tended to use a plainer vocabulary with fewer observational details than those in the higher levels. Responses were less focused and controlled at this level.

High marks for Style and Accuracy often reflected the precise and varied vocabulary used as well as the technical accuracy of the writing. In both descriptive tasks, similar details were often included but more effective responses had a much wider range of vocabulary, precisely deployed to create specific effects. Highly effective responses showed an ability to use both simple and complex language and sentence structures to create subtle, complex atmospheres. In less effective responses, vocabulary was sometimes wide-ranging and complex but used with less precision. In a few cases, this insecure use of language resulted in a style which was difficult to follow and the credit which could be given for a wide-ranging vocabulary was lost by its imprecise use and lack of clarity. A significant number of responses showed a tendency to repeat the same sentence structure excessively, for instance in their description of the bus or train each feature of the uncomfortable transport being described by a simple sentence. On the other hand, complex and obscure language was unhelpful where it was not used with understanding.

As is often the case in less secure descriptive writing, tenses switched between past and present, sometimes within sentences. Incomplete or verbless sentences also affected marks given in the middle range, even where other technical aspects of style were more accurate. Lapses in grammar, perhaps minor in isolation but more damaging when persistent, also kept responses out of Level 4 for Style and Accuracy. This included disagreement, especially between pronouns and verbs, and the omission of definite and indefinite articles were also common and damaging to otherwise accurate style at this level.

Ways in which the writing of descriptions can be improved:

- try to avoid clichéd scenarios and consider a more individual and original selection of content. Choose a scenario which gives you a range of details on which to focus
- keep your focus on details which will help you evoke a particular atmosphere
- write sentences with proper verbs and do not switch tenses
- use vocabulary precisely: complex words used wrongly do not help your style.

Narrative writing

Write a story which involves making a new friendship.

Write a story with the title, 'The last one'.

Both narrative writing questions were popular choices across the mark range and there was a very wide range of plots, characters and scenarios in these responses. Effective responses were well organised and thoughtful interpretations of the title which used engaging, credible ideas to create developed stories. An ability to shape the narrative and to produce moments of tension or drama and to vary the pace of the story were credited by examiners as essential elements of narrative writing, as was the use of characterisation to create believable protagonists and characters. The first question offered a range of scenarios for making the new friendship, from someone starting a new school or moving to a new area, to making a new friend whilst on holiday. Effective responses were able to build a narrative using setting, character and plot development, whereas less effective responses offered a straightforward narrative in which there was little opportunity to elaborate on character, setting or, the creation of tension.

Responses at Level 5 and 6 wrote engaging and effective narratives with effectively developed plots. Characterisation was convincing and the climax to the plot was well-managed. One narrative for **Question 2** was written set in a dystopian landscape where two survivors meet each other scavenging for food and form an unlikely friendship. Another narrative described an Antarctic scientist studying penguins and the friendship she developed with a young and lonely local girl. Whichever interpretation was given to the tasks, for Level 5

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marks for Content and Structure, stories needed to be well-managed with some conscious shaping of the plot.

Level 4 marks for Content and Structure were awarded for stories which were relevant to the task but were less developed and used fewer elements of effective narrative writing. Characters and narrators tended to be more simply drawn and responses were often more dependent on a series of events, lacking attention to characterisation and setting. A simplicity of content or a lack of development rather than ineffective organisation was typical at this level. Similar plots and scenarios were used as those in more effective narratives but these narratives rarely moved beyond a simple retelling of events.

These Level 4 responses had a relevant plot; their narratives were cohesive with some setting of scene and their characters sometimes developed. Often the plots centred on making friends after moving to a new school, for example, in one response a new friend was made at school, culminating in a dramatic sleepover where it was discovered the new friend's intentions were malignant. Another response was written about how the character was nervous and anxious about the new school until meeting a new friend who introduced them to the other students leading the plot to a happy conclusion.

Lower-level responses had less organised plot lines which did begin to meet the brief but lacked details and clear development of ideas. For example, there was one response about a lonely boy forming a friendship with a pet dog with very little detail about how the boy felt before and after the friendship resulting in a very briefly developed plot.

For the second question, the title 'The last one' was used in a variety of different ways from a story about the last packet of crisps in the shop to a narrative in a futuristic world about the last survivor of the human race. Effective responses were often, imaginative, dramatic and engaging. Less effective responses tended to narrate a timeline of events, making their responses relatively basic.

In higher level responses, the plot often led up to the title, fully incorporating this into the narrative, leading to a suitable climax and conclusion. In one response, there was a tension filled description of two siblings hiding in a classroom from their dangerous father as he approached the last classroom to kidnap his daughter after a failed custody battle. In another response the candidate described a character alone in the world after an apocalypse. The empty and eerie surroundings were convincingly described with a plot twist in the last paragraph where a penetrating voice was heard whispering 'you weren't supposed to live'. Level 5 responses were usually more straightforward in structure and approach but nonetheless engaging for the reader. Examiners could award marks in Level 5 for Content and Structure where the narrative was organised and there was a clear attempt create a developed story which was relevant to the task. Responses in this range were more usually chronological accounts but were cohesive and balanced and contained a suitable ending depicting some satisfying resolution: for example, in one engaging response there was a mostly clear narrative about a 'Game' being held where the contestants had to fight until they were the last one standing. This response gave detailed descriptions of the contestants in the event, of how they felt and acted, and the surroundings were also well described. The last contestant standing was a little girl called 'Memory' but the significance of this character and her name was not made clear to the reader. Because of the mostly well-developed characterisation and clear structure the candidate was awarded Level 5 despite the ambiguity of the conclusion. Level 4 responses were often relevant and developed narratives in which a character would for example describe how everyone disappeared from the world with the exception of them self, what they did and how they coped with this. Although these responses developed features of character and setting, they often lacked a suitable conclusion or enough interest to engage the reader.

Less effective responses were often simple, straightforward narratives without much detail of setting or description of the characters, although these responses were relevant, they were often just a simple a timeline of events. Sometimes responses were disorganised accounts of something or someone being the last one, which although relevant lacked cohesion and a sense of purpose.

High marks for Style and Accuracy were given for responses where the writing was engaging and varied in vocabulary and where different sentence structures were controlled and used to create particular effects. The characteristics of Level 6 writing included a fluent and flexible use of language which was subtle enough to create a range of effects to engage the reader. Punctuation within sentences, especially in the use of dialogue, was secure in responses in Level 6 and were coupled with a sophisticated and precise range of vocabulary, the highest marks were given. Responses awarded marks in Level 5 tended to be less ambitious and complex but still mostly accurate and largely fluent while Level 4 responses were plain in style and lacked some range in vocabulary. At this level, the writing had few serious errors which affected the clarity of meaning, such as insecure sentence control, sentence separation and grammar errors. Relatively common errors of grammar and expression appeared increasingly in responses given low Level 5 and Level 4

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responses, such as disagreements, missing articles and imprecise, sometimes over-ambitious vocabulary. Errors in sentence control and separation, as well as lapses in tenses, limited otherwise competently told narratives to Level 4, as did frequent errors in basic punctuation or grammar. The omission of definite and indefinite articles, the incorrect use of participles or errors in grammatical agreement contributed to a lack of fluency and accuracy which kept many responses out of Level 5. Similarly, basic punctuation errors and the misspelling of simple words and wrongly selected homophones sometimes appeared in otherwise competent writing and were sometimes frequent enough to affect the mark for Style and Accuracy. A frequent reason for keeping an otherwise clearly written narrative out of Level 5 was insecure demarcation of sentences, most commonly the use of commas where full stops were needed. Though the mixing of tenses and the use of incomplete sentences were perhaps more prevalent in the descriptive writing, these issues also limited the marks available in the narrative writing.

Ways in which the writing of narratives can be improved:

- think about how to interest and intrigue the reader in shaping your narrative
- consider imaginative ways to tell your story, apart from a chronological account
- characters' thoughts and feelings help to engage your reader. Do not rely on events
- check your writing for errors which will badly affect your mark, such as basic spelling and punctuation mistakes
- use complicated vocabulary with precision and consider the power of simple words and sentences to create particular effects.

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FIRST LANGUAGE ENGLISH

Paper 0500/03
Coursework Portfolio

Key messages

Candidates did well when they:

- adapted their writing style to demonstrate an understanding of the needs of different audiences and context for each of the three assignments in their coursework portfolio
- read critically and thoroughly evaluated the implicit and explicit ideas, opinions, and attitudes they identified in a text for **Assignment 1**
- assimilated ideas from a text to provide developed, thoughtful and sophisticated responses in **Assignment 1**
- supported their analysis, evaluation and comments with a detailed and specific selection of relevant ideas from a text in **Assignment 1**
- wrote original and interesting assignments which reflected their personal ideas, feelings and interpretations of events and situations
- wrote with confidence using a wide range of vocabulary with precision and for specific effect
- sequenced sentences within paragraphs in a way which maintained clarity of arguments, description, or narrative
- demonstrated a high level of accuracy in their writing
- engaged in a process of careful editing and proofreading to identify and correct errors in their writing.

The best practice for the production and presentation of coursework portfolios was when:

- centres followed the guidelines and instructions set out in the Course syllabus and the Coursework Handbook
- a wide range of appropriate texts were used for **Assignment 1**, which contained ideas and opinions to which candidates could respond, and were relevant to their interests
- centres set a range of appropriately challenging tasks which allowed candidates to respond individually and originally to topics and subjects they were interested in, or of which they had personal knowledge or experience
- teachers gave general advice for improvement at the end of the first drafts
- following feedback, candidates revised and edited their first drafts to improve their writing
- candidates checked, revised, and edited their final drafts to identify and correct errors
- teachers provided marks and summative comments at the end of the final draft of each assignment which clearly related to the appropriate mark level descriptors
- teachers indicated all errors in the final drafts of each completed assignment
- centres engaged in a process of internal moderation and clearly indicated any mark adjustments in the coursework portfolios, on the Individual Record Cards (ICRC), and on the Candidate Assessment Summary Forms (CASF).

General comments

A significant number of candidates produced interesting coursework portfolios which contained varied work across a range of contexts. There was evidence to show that many centres set tasks which allowed candidates flexibility to respond to subjects related to their personal interests or experiences. Most coursework portfolios contained writing of three different genres. Moderators reported seeing very few incomplete folders.

The majority of centres provided the correct paperwork and completed all relevant forms accurately. The Moderation Team reported that many centres provided summative comments closely related to the mark

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schemes at the end of each completed assignment. These were extremely helpful in helping moderators to understand how and why marks had been awarded and centres are thanked for following the process as instructed in the Coursework Handbook.

The major concern for all moderators was that some markers of the coursework portfolios did not indicate errors in the final draft of each assignment and/or provide a summative comment which referred to the marking level descriptors to justify the marks awarded. Failure to follow this process often resulted in inaccurate or inconsistent marking and was one of the main reasons for adjustment of marks.

Administration

Successful administration was when centres:

- used the coursework checklist to ensure all administration guidelines had been followed
- submitted their sample and documents by the deadline
- carried out a thorough process of internal moderation which was clearly signposted on the assignments themselves as well as all relevant documentation
- indicated all errors in the final draft of each assignment
- supplied marks and specific comments relating to the mark schemes at the end of the final draft of each assignment
- accurately completed the CASF and ICRC, including any amendments made during internal moderation
- ensured that each coursework folder was stapled or tagged and securely attached to the ICRC, using the ICRC as a front cover
- submitted their sample of coursework folders without using plastic or cardboard wallets.

Internal Moderation

Moderators reported further improvements in the number of centres getting the administration right this session. This can be attributed to the coursework checklist which when used ensures that centres follow all guidelines in the 0500/0990 Coursework Handbook.

Centres who followed the instructions for carrying out internal moderation as directed in the Coursework Handbook are thanked for engaging in this important process. There was a general trend of greater accuracy of marking by centres where there was clear evidence of internal moderation than centres where no internal moderation process was evident on the coursework folders and documentation.

Some centres did not record changes made at internal moderation on the candidates' Individual Candidate Record Cards (ICRCs) which caused some confusion about the final mark awarded to candidates. Centres are requested to ensure that any changes made at internal moderation are signposted clearly on the work itself then also recorded on the ICRC as well as on the Coursework Assessment Summary Form (CASF).

Using the Coursework Handbook

A cause of concern for all moderators was that some issues persist even though there are clear instructions in the Coursework Handbook, and the same concerns have been raised in previous Principal Moderator Reports. To ensure effective and accurate marking is achieved, and that all paperwork arrives safely for moderation, it is essential that all the instructions given in the Coursework Handbook, and on the relevant forms, are carefully followed.

Below highlights the three most significant issues related to the administration and annotation of candidates' work which led to mark adjustments by moderators:

1 Indicating all errors in the final version of each assignment

- Some of the assignments showed little or no evidence of complying with the instruction in the Coursework Handbook that **markers should indicate all errors in the final draft of each assignment**. This process helps markers to effectively and accurately evaluate the strengths and weaknesses of a piece of work and to apply the most appropriate 'best fit' mark from the mark scheme. If this process does not take place, it is difficult for markers to make a balanced judgement. In several centres there was evidence across all three assignments that markers had awarded marks from the higher levels of the assessment criteria to work containing frequent, and often serious errors that had

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not been annotated by the marker. This inevitably led to a downward adjustment of marks by the moderator.

2 Individual Candidate Record Cards (ICRC)

- A number of centres did not attach the portfolios of work to the ICRC in accordance with the instructions in the Coursework Handbook and point 4 on the electronic version of the ICRC.
- Some confusion was caused when centres included ICRCs for the whole cohort as well as the ICRCs for the sample sent; centres only need to send the ICRCs (securely attached to the coursework portfolio) for the candidates in the sample submitted for moderation.
- On some folders there were errors in the transcription of internally moderated mark changes, or it was unclear which mark was the final one. **Where internal moderation has taken place, any mark changes should be transferred from the assignment to the ICRC** to ensure that the moderator has a clear understanding of all mark changes.

3 Coursework portfolios

- A small number of centres did not collate the individual assignments into complete coursework portfolios but instead placed loose pages of work into the grey plastic envelopes and despatched them to Cambridge; this caused moderators some difficulties when assembling the coursework folders and increased the risk of work becoming lost or mislaid. Centres should secure each individual coursework folder using tags or staples with the ICRC securely fastened as a cover sheet.
- Moderators reported that several centres used plastic wallets or folders to present candidates' work as an alternative to securely attaching the individual assignments to the ICRC; this caused extra work for moderators and increased the risk of work being mislaid. **Centres are requested not to place coursework folders into plastic or cardboard wallets.**
- Some centres included more than one rough draft in each folder; this is unnecessary and can lead to confusion. Please ensure that the rough draft included is clearly labelled as a draft.
- Occasionally rough drafts contained annotations and specific feedback; centres are reminded that when markers offer feedback on rough drafts, it should be general advice. No errors should be indicated, and the marker should not offer corrections or improvements.
- Some centres included documentation not required for the moderation process; the only paperwork that should be included in the sample is clearly indicated in the Coursework Handbook.

Use of Artificial Intelligence

- Moderators reported seeing a number of responses where AI may have been used. This was particularly apparent where a draft had been improved considerably in terms of style and use of vocabulary, or where a response to one assignment appeared to attain a much higher standard than the other assignments in the folder.
- Centres are reminded that it is the teacher's responsibility to ensure that all coursework assignments are the candidate's own work and that any use of generative AI for research purposes has been clearly acknowledged in the work. Centres are reminded that the inappropriate use of generative AI to create or enhance student work without acknowledgement risks being classed as plagiarism.

Comments on specific assignments

Assignment 1

Candidates were successful when:

- they responded to interesting texts of appropriate length which contained engaging content
- they demonstrated analysis and evaluation of the individual ideas and opinions identified within a text
- the form, purpose and intended audience of their writing was clear to the reader
- they wrote in a fluent, accurate and appropriate style.

Moderators commented that many candidates responded to texts which were of an appropriate length and challenge, and which appealed to the interests of the candidates. Successful texts included articles exploring issues relevant to young people, for example, single-sex schools, social media influencers, the pros and cons of having tattoos, climate change, the influence of fashion, the pros and cons of AI, and issues of local or national interest. Less successful texts were those which were old and outdated, texts which were too

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informative (and often long) or texts which were of limited personal interest to the candidates. Texts selected for **Assignment 1** should be an appropriate length, explore ideas and offer opinions, and use rhetorical or literary devices designed to provoke or sustain the reader's interest to ensure that the text offers scope for candidates to fully engage and respond to it in a sustained piece of writing. Centres are encouraged to use a good range of relevant and up-to-date texts for **Assignment 1**. Other less successful texts were ones where the candidate fully endorsed the writer's views and opinions because they offered few opportunities for evaluating those ideas and opinions, as required by the mark scheme. It is also crucial to select texts for their quality of written communication: moderators reported seeing a number of poorly written texts taken from a variety of websites. Many of these were too long and tended to be informative, offering very little scope for rigorous evaluation or analysis. Moderators also reported seeing texts which contained potentially offensive or disturbing material. This may indicate that candidates were allowed to make their own text choices, but centres are reminded that it is their responsibility to ensure that all texts used for **Assignment 1** are fit for purpose, and this includes avoiding offensive or unsuitable material.

Some centres set one text for a class or sometimes whole cohort. When this approach was adopted by a centre there was usually a tendency for candidates to produce responses which were very similar in content and structure due to heavy scaffolding. This made it difficult for candidates to create the original and sophisticated responses expected of the higher-level assessment criteria and was a reason for adjustments of marks. Centres are advised that teaching a text to a whole class and offering a scaffolded plan for the response may be a useful teaching strategy for developing the necessary skills and knowledge for **Assignment 1**, but this approach should not be used for the final coursework submission; it is recommended that candidates are offered a choice of texts approved by the teacher.

If centres are unsure about how to approach and set tasks for **Assignment 1**, they can refer to the Course Syllabus and the Coursework Handbook. Both documents provide advice and guidance about task setting and text selection and can be found on the School Support Hub via the main Cambridge website.

Reading

Although many centres were accurate with their marking of reading, as in the previous moderation sessions, there was a significant trend for many centres to award marks from the highest-level assessment criteria to work which more appropriately met the lower-level assessment criteria. Candidates who successfully met the higher-level assessment criteria were those who demonstrated a consistently evaluative approach to most of the ideas and opinions in a text, and provided a developed, sophisticated response which made direct reference or included quotes from the text. Candidates who engaged in a general discussion about the topic or subject of a text, or those who did not thoroughly evaluate a text, tended to produce work which more appropriately met the Level 4 assessment criteria in Table B (reading). The most common reasons for adjustments to a centre's marks for reading were when moderators identified a trend of candidates engaging in a general discussion about the topic of a text/s, or when the number of points covered were 'appropriate' rather than 'thorough'.

Writing

Many candidates responded to texts in an appropriate form and style. Letters were the most popular choice of form, and many candidates demonstrated some understanding of audience and purpose. When candidates were less successful with writing, it was often because the form, intended audience and purpose of the writing was not clear. This made it difficult for the candidates to meet the highest-level assessment criteria and was a reason for adjustments to writing marks for **Assignment 1**. Successful responses to **Assignment 1** tasks were those in which the writing was highly effective, almost always accurate, and consistent throughout in the application of form and style. Work which showed insecurity with form and style, such as the omission of an appropriate ending to a letter, a limited or inconsistent use of rhetorical devices for speeches, or lack of clarity of the intended audience, tended to meet the assessment criteria for Level 5 Table A (writing) or below. The moderators noted that there was a tendency for some centres to award marks from the highest-level assessment criteria to work which more appropriately met the lower-level assessment criteria.

Another common reason for the adjustment of marks for writing was because of the accuracy of the candidates' writing. When errors impaired meaning, such as the incorrect construction of sentences or use of grammar, typing errors, or the incorrect selection of words from spellcheck, the overall quality and efficacy of the discussion was affected. Errors such as these are classed as serious and make it difficult for candidates to meet the higher-level assessment criteria; this type of writing is more characteristic of writing achieving marks from the middle to the lower levels of the assessment criteria. Moderators also noted a tendency for

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centres to over-reward vocabulary that had some merit in its selection but was not always used precisely or effectively in the response.

Advice to candidates for Assignment 1

- thoroughly explore, challenge, and discuss the ideas in the text
- avoid making general comments about the topic or subject of the text, instead, ensure that comments are specifically related to the ideas, opinions or attitudes identified in the text
- look for, and use inferences made implicitly in the text
- look for contradictions or misleading assumptions in the text and comment on them
- develop points to create a thorough, detailed, and clear line of argument or discussion
- make sure that the audience and purpose is clear and adapt the written style accordingly
- proof-read assignments to ensure punctuation, vocabulary choices and grammar are correct.

Assignment 2 (description)

The majority of tasks set for **Assignment 2** were appropriate and encouraged candidates to write in a descriptive style. Many students wrote engaging and vivid descriptions from experience or their imaginations, which were a pleasure to read. Moderators also noticed that there were fewer descriptions which slipped into narrative than in previous sessions, but this is still a relatively common flaw in descriptive writing assignments, sometimes due to the nature of the tasks set. Moderators reported seeing some tasks which invited candidates to describe a specific scene from a play, or chapter from a novel, which tended to lead to unoriginal responses, or tasks more suited to narrative writing. Centres are reminded to set descriptive tasks and remind candidates to avoid using narrative writing techniques in their responses.

The most engaging and successful descriptions were those where the candidates had carefully selected vocabulary to create a realistic and credible sense of atmosphere, place or person, and which were well sequenced and carefully managed for deliberate effect. Successful responses included descriptions of towns or cities in which candidates lived, important events in candidates' lives, or significant settings or places. Less successful tasks were those which asked candidates to describe events or scenarios of which they had no personal experience, or settings and situations in which the candidate clearly had no interest or engagement. Many of these responses relied on unconvincing descriptive writing which did not engage the reader. This type of writing is characteristic of work achieving marks from the middle to lower levels of the assessment criteria, although it was noticed that many centres awarded marks from the higher-level assessment criteria. This was quite often a reason for adjustment of marks from Table C (content and structure).

Whilst many candidates showed a secure and confident understanding of language, there was still a general tendency by a number of centres to award marks from the higher-level assessment criteria to work which contained ineffective overuse of literary techniques. Some moderators commented that this seemed to be actively encouraged by some centres. To achieve marks from the higher-level assessment criteria, candidates need to demonstrate a confident and secure understanding and use of language for specific effect. This is difficult for candidates to achieve if they over-use adjectives, include inappropriate images or idioms and/or use obscure or archaic language. The overworking of language was a common reason for moderators adjusting marks.

Another common reason for adjustments to marks was when moderators identified a trend of awarding marks from the higher-level assessment criteria to writing that contained a limited range of sentence structures, incorrectly constructed sentences, or contained frequent errors with punctuation and grammar. Writing that achieves marks from Levels 5 and 6 of Table D (style and accuracy) is expected to be consistently accurate, consistent with the chosen register, and demonstrate an ability to use a range of sentences for specific effect. The moderators saw some writing which displayed these characteristics, but a significant number of the assignments receiving marks from centres from Levels 5 and 6 in Table D more frequently displayed the characteristics of writing expected from Level 4 or below. Many candidates 'told' the reader about the scene being described, rather than engaging the reader with a careful and precise use of vocabulary and images. The moderators also noticed a general trend for candidates to use repeated sentence structures and create almost list-like descriptions.

In addition, the work of a significant number of candidates contained frequent and serious errors which impaired the meaning and overall effect of the candidates' work. The most frequent errors were missing prepositions and articles, tense inconsistencies, typing errors, commas used instead of full stops and grammar errors. Quite often, the meaning of sentences was blurred, or meaning was lost altogether. Errors

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which affect the meaning and clarity of writing cannot be considered as 'minor'. As mentioned earlier in this report, the absence of the indication of all errors made it difficult for the moderators to determine whether errors had been considered when marks had been awarded; moderators noted that on some weaker assignments no errors had been annotated, and the summative comment declared a high level of accuracy. Accurate and effective application of the assessment criteria is achieved through the careful weighing up of the strengths and weaknesses of a piece of writing and the application of a mark which 'best fits' the assessment criteria. To achieve this, it is essential that errors are identified and indicated by the markers. Engaging in this process allows markers to effectively balance the strengths and weaknesses of a piece of writing and apply marks that are most appropriate to their candidates' work.

Information and guidance on how to apply the mark schemes are given in the Coursework Handbook. Examples of good tasks and exemplification of the standard of work expected at the different levels of the mark scheme are also provided in the Coursework Handbook.

Advice to candidates for Assignment 2

- use a range of vocabulary suited to the context and content of the description
- create images appropriate for the context and content of the description
- create an engaging imagined scenario using language designed to have an impact on the reader
- avoid slipping into a narrative style
- proof-read responses to identify and correct common errors such as missing articles and prepositions, switches in tenses and typing errors
- avoid repetitive sentence structures; instead use a range of sentences for specific effect.

Assignment 3 (narrative)

Much of the task setting for **Assignment 3** was generally appropriate and moderators saw some engaging and effective narratives which were well controlled and convincing. Moderators reported seeing some tasks which did not invite narrative responses as they were too informative. These included accounts of Jack the Ripper or sometimes descriptions of film or book plots. Successful narratives were those in which candidates created stories characterised by well-defined plots and strongly developed features of narrative writing such as description, strong characterisation, and a clear sense of progression. The narration of personal experiences and events, or responses where candidates were able to create convincing details and events within their chosen genre, tended to be more successful. Candidates were generally less successful when their understanding of audience and genre was insecure, and the resulting narratives lacked credibility and conviction. Moderators commented that this sort of writing was often seen when candidates were writing in the genre of horror or murder mystery stories. Stories such as these, although containing a definite beginning, middle and ending, were often unrealistic and incredible, or lacked development of character or plot. Some responses failed to conclude properly, ending with an unconvincing or unsatisfactory cliff hanger. This sort of writing is classed as 'relevant' or 'straightforward' and should expect to be awarded marks from Level 4 or below from Table C (content and structure). Moderators noticed that there was a trend with a significant majority of the work sampled for centres to award marks from Levels 5 and 6 to writing which more appropriately fitted the Level 4, or below, assessment criteria. This was quite frequently a reason for marks being adjusted.

When moderators saw very accurate work containing precise well-chosen vocabulary, and which maintained a consistent register throughout, they could agree when centres awarded marks from Levels 5 and 6 in Table D (style and accuracy). As with **Assignments 1** and **2**, moderators noticed a significant trend for centres to award marks from the highest levels of the mark scheme to work which contained frequent and persistent errors and which more accurately met the assessment criteria from Level 4 or below in Table D. This was a common reason for adjustment of marks. The comments made for **Assignment 2** with regards to accuracy and the annotation of errors are also relevant to **Assignment 3** and should be noted by all who mark coursework.

Advice to candidates for Assignment 3

- create stories that are realistic, credible, and convincing
- remember that characters' thoughts and feelings help to engage the reader
- avoid clichéd scenarios and consider an individual and original selection of content
- carefully proof-read and check assignments for errors such as punctuation, use of prepositions and articles, tenses, and construction of sentences.

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FIRST LANGUAGE ENGLISH

Paper 0500/04
Speaking and Listening Test

Key messages

Whilst the majority of centres adhered to the rubric of the test with regard to timing, some did not follow the requirement to conduct full tests. This is a serious concern. Where centres have conducted short tests, particularly for **Part 2**, the conversation, Moderators have been instructed to adjust marks to address the brevity.

Part 1 should last for 3 **–** 4 minutes. A significantly short **Part 1** response will affect the mark that should be awarded. Equally, an overly long response to **Part 1** should also affect the mark awarded.

Part 2 should last for 7 **–** 8 minutes and it is the responsibility of the Examiner to ensure the correct timing is adhered to. Conversations that run for significantly less than the minimum 7 minutes required do not allow candidates the opportunity to access the full range of marks available because certain descriptors in the higher levels cannot be met.

Part 2 should consist of a conversation between the candidate and the Examiner. It follows that a **Part 2** that is in essence a series of unrelated questions is not an appropriate model to use for the most successful outcome. Questions should be used to prompt candidates to explore ideas and opinions related to the topic content introduced in the **Part 1** talk but a **Part 2** that consists solely of questions followed by answers is not a natural conversation and cannot be credited as such when awarding marks.

Centres should avoid grouping marks in the top level unless this is strongly evidenced in the candidates' performances. Centres that simply award marks in Level 5 for either **Part 1** or **Part 2**, without recourse to applying differentiation where it is needed, actually disadvantage those candidates who may have performed to a higher level. This was particularly noticeable in **Part 2**. The way that moderation works means that inflating marks for those candidates who do not justify them through performance will almost certainly mean downscaling is applied.

Administration – General comments

For most centres, administration of the test was diligent and accurate. Summary forms were completed to a high degree of accuracy and samples uploaded to SfA were of a very good sound quality.

Where there were issues, the following guidelines may help to clarify administrative requirements:

- Each candidate's test requires a full formal introduction to be made by the Examiner prior to the beginning of **Part 1**. This introduction should include the centre name and number, the candidate's full name and candidate number, the date on which the test is being recorded and the name of the Examiner. This is important information for the Moderator. The overwhelming majority of centres were compliant with this requirement and are to be congratulated for their diligence.
- Whilst it is perfectly acceptable for centres to create their own version of the Summary Form (the OESF), it is important that any such version includes all the same information required on the form provided by Cambridge. A form that does not have a full breakdown of the marks for each candidate in the cohort is not acceptable. All forms should have, therefore, a breakdown of the marks that includes a mark out of 20 for **Part 1**, a mark out of 10 for **Part 2** Speaking, a mark out of 10 for **Part 2** Listening and a total mark out of 40. A form that truncates **Part 2** into one mark out of 20 is not acceptable for the Moderator.
- Centres are reminded that for moderation to take place effectively and efficiently OESF Summary Forms are required that show the breakdown of marks for the whole cohort of entered candidates and not just those in the sample requested.

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- Centres are to be congratulated for managing internal moderation where more than one Examiner was involved in conducting the tests. However, these centres should be careful to enter the correct set of marks into SfA. On some occasions the original marks appeared in SfA even though changes had been made during internal moderation.
- It is the centre's responsibility to check the quality of the recordings being made, preferably as an ongoing process during each recording session, to ensure that the recordings are clearly audible and without interference. On a few occasions, the Examiner was clearly audible, but the candidates were not. Any problems with the quality of recordings should be reported to Cambridge immediately so that candidates are not adversely affected by such issues.
- A small percentage of centres uploaded videos of their candidates performing their tests. This practice is actively discouraged.

Conduct of the test – General comments

Overall, across the component entry, the standard of examining was very effective with candidates being given plenty of opportunities to express their ideas and demonstrate their range of oratory skills productively. There were some centres who did not follow the rubric set out in the syllabus but still awarded highly inflated marks for their candidates. Subsequently, these marks were reduced upon moderation.

Where there were concerns, the following advice is offered:

- It is strongly advised that each test should begin with the Examiner's formal introduction and be followed immediately by the candidate performing **Part 1**, the Individual Talk. If an Examiner feels that a candidate is very nervous and needs a moment of calming prior to the formal test beginning, it is recommended this is done before the recording is started. Examiners formally starting the test then engaging in 'off topic' conversation with candidates before asking them to begin their **Part 1** task is strongly discouraged.
- Given that both Speaking and Listening are assessed in **Part 2**, it is important that the conversations last long enough for candidates to demonstrate their strengths in both mediums. It is the Examiner's responsibility to ensure this minimum expectation of 7 minutes is met so that candidates are given every opportunity to demonstrate the range of skills they possess.
- If a candidate has exceeded the maximum 4 minutes for **Part 1**, the Examiner should not compensate by shortening the time allowed for **Part 2**. Candidates must be allowed the required 7 **–** 8 minutes to complete a full response to **Part 2**, irrespective of the length of the talk in **Part 1**.
- It is also important that the conversations offer sufficient challenge to allow candidates to demonstrate the range of skills they possess. Focused questioning and prompts are needed to move the conversation forward, together with an adaptability on the part of the Examiner to absorb the candidate's previous comments and to extend the conversation as a result. A **Part 2** that is merely a question-and-answer session is not a natural conversation and as a consequence is limited in terms of the marks that should be awarded.
- Examiners who rely on a pre-determined set of questions disadvantage their candidates, in particular with regard to the mark for Speaking in **Part 2**. A question from the Examiner should lead to an answer from the candidate which then may lead to a comment or prompt from the Examiner that is connected to the same content matter. This will in turn lead to another connected response from the candidate; and so, the conversation develops naturally.
- Examiners who dominate conversations or who frequently interrupt candidates during the conversation do so to the disadvantage of those candidates. Effective Examiners prompt candidates then allow them the opportunity to respond in full and to develop their ideas before moving the conversation forwards again.

Comments on specific sections of the test

Part 1 – Individual Talk

The following comments by Moderators reflect performance in **Part 1** in this series:

Focused talks are more successful in that they allow the candidate to explore and go 'deep' into a topic. For example, instead of 'Music', I enjoyed listening to 'The Power of Music' and 'Music Invokes Memory'. Similarly, instead of the broader 'Pets' there was 'Protecting Domestic Pets'.

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Many candidates had experiences of travel or living in different countries to draw on so there was plenty to talk about. However, this needs to be framed in a way that demands some reflection or evaluation rather than just an explanation of what happened.

*Avoid **Part 1** talks which come across as over-scripted or over-memorised. Instead, aim for a more natural approach which engages the audience and retains some spontaneity.*

Some candidates chose to tackle a specific aspect of their topic, and this benefited them greatly, allowing them to focus on a specialised area or point of debate.

Almost exclusively, all the responses to **Part 1** were in the form of a presentation. This format remains a safe and acceptable one, particularly if there is an attempt to analyse, evaluate and reflect on personal experiences. For many candidates this choice remains a safe and productive way to achieve a high mark in **Part 1**, but only when well-timed and clearly structured. Less successful responses to **Part 1** tended to lack focus because a strong structure had not been created and time constraints had not been factored in. Largely narrative responses that follow a linear path, such as talking about a holiday or simply restating facts about a topic choice, tend to be unimaginative and rarely achieve higher than Level 3. This is why topics such as 'My Favourite Football Team (or video game, K-Pop band, movie, hobby)' do not tend to be very successful. Generally, these kinds of topic only become more successful if there is an added element that expands the talk beyond adequate. For example, 'How My Hobby Has Been Life-changing' immediately introduces more sophisticated elements into the talk through introspection, analysis and evaluation.

Very strong performances in **Part 1** successfully combined excellent knowledge and development of a topic, a tightly defined structure timed accordingly and a confident delivery style. It should be noted that the bullet point descriptor 'lively' in Level 5 does not have to mean that a candidate delivers an animated performance. A candidate who delivers a talk in a confident and assured tone without being overtly 'lively' can perform equally well for the second descriptor in Level 5. Subtle changes of tone can be very effective in fully engaging an audience.

Some examples of **Part 1** topics from this series that worked well included:

The science of sleep
Ethics of true crime shows
Tourism in Jamaica
Women in film
Split decisions
The dark side of football
The fascinating world of fragrances
Persistence
Editing classic books
The Butterfly Effect
Marketing: A twenty-first century dilemma

Some examples of **Part 1** topics from this series that were less successful included:

Technology (Too generalised)
Music (Too generalised)
Social media (Too generalised)
A.I. (Topical but without a clear focus)
Neymar (Descriptive and without a clear focus)
A typical day (Limiting and little to discuss in **Part 2**)

Part 2 – Conversation

The following comments from Moderators reflect performance in **Part 2** in this series:

*There was some marking of **Part 2** which was lenient when they were considerably short of the required 7 minutes.*

*Candidates who had relied on cue cards or visual aids in **Part 1** were often stronger in **Part 2** when more natural, spontaneous speaking skills could be assessed.*

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A number of Examiners asked lots of closed or factual questions whereas more effective Examiners spoke less and asked more open questions such as 'tell me about…' or 'tell me more about…' and then referenced what had been said.

Candidates should choose topics they are already familiar with. It is detrimental to the marks when a candidate is answering questions in an area they have seemingly newly studied just for this component.

Candidates should try and provide detailed responses and avoid monosyllabic answers.

Most Examiners conducted the conversations effectively and encouraged candidates to extend and develop the topics.

Generally, the **Part 2** conversations were well conducted and Examiners asked appropriate and interesting questions which enabled the candidates to extend and develop their ideas. After initial questioning to stimulate the conversation, the use of prompts, instead of lots of further questioning, was often more effective in eliciting developed responses from candidates.

Unlike in **Part 1**, the Examiner can influence the quality of the candidate's performance in **Part 2**. Concise but challenging prompts often led to candidates developing their ideas more successfully than when a question was convoluted or closed. Some Examiners included closed questioning and offered too many of their own ideas during the conversations. Indeed, where a candidate was moved down a level during moderation, it was sometimes due to a lack of detailed response, caused by unimaginative questioning. The use of pre-determined questions or a perfunctory question and answer technique limits the candidate's ability to engage in a real conversation where responses are elicited by what is said immediately before.

Issues with timing are also a major contributor to candidates achieving fewer marks than they could in **Part 2**. A **Part 2** that lasts for significantly less than the minimum of 7 minutes required cannot fulfil the descriptors in Level 5, and most likely not in Level 4 either. The descriptors for **Part 2** are assessed on the basis of a full **Part 2** being performed. Allowing only 2 – 4 minutes for **Part 2** does not provide the necessary evidence of consistent and detailed responses required. In effect, short conversations limit the range of marks that can and will be awarded.

One issue remarked upon by several Moderators is that some of the formal conversations in **Part 2** became too informal and 'chatty'. It is understandable that Examiners wish to put their candidates at ease, but a level of formality is still expected and is addressed in the second bullet point descriptor at each level regarding the accurate use of language.

It should be noted that the 'changes (alterations) in the direction of the conversation' descriptor does not mean that Examiners should steer the conversation away from the central topic to something completely different. 'Changes in the direction' can mean introducing a new perspective on the topic or challenging a previously stated opinion but any ensuing conversation should still be focused on the topic presented in **Part 1**.

Advice to centres

- Adhering to the correct timings for each part of the test will allow candidates the best opportunity to be successful. Ensure that the candidate's Individual Talk is 3 – 4 minutes long. If necessary, you can help them in the test by interceding before 5 minutes and initiating the conversation.
- When considering the timing of **Part 1**, please remember that **Part 1** begins when the candidate starts speaking and does not include the Examiner's introduction.
- Helping a candidate choose the most appropriate topic is key to them being successful in the test. At the planning stage, a gentle suggestion to choose an alternative topic may be very beneficial in some cases.
- Try to dissuade candidates from simply delivering a memorised talk in **Part 1** that may have artificial fluency but lacks any emotional attachment and suffers from robotic intonation. It is much better to prepare using a cue card so that what is said has some level of spontaneity.
- Ensure a full 7 – 8 minutes is allowed for the conversation in **Part 2**. The Examiner can control the timing of this.
- Administering the conversation in **Part 2** can be quite challenging for Examiners so it may be necessary to practise just as the candidates should. Knowing the topic in advance and preparing some relevant

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back-up questions may help the Examiner but they should not be restrictive, and the candidate should have no prior knowledge of them.

- Scaffold questions strategically to encourage higher level responses from more able candidates. This will help them to access the higher mark ranges.
- Do not interrupt too keenly; another prompt given before the previous response is finished, or when the candidate pauses for thought, can affect the candidate adversely by limiting their capacity to develop their ideas fully.
- Be careful not to make judgements based on personal interpretations of a comment made by a candidate. This is a test of speaking and listening and not the perceived accuracy of what is said.

Advice to candidates

- Choose a topic you are passionate about and one you can talk about for 3 – 4 minutes then discuss in even more detail for 7 – 8 minutes without repeating yourself.
- Practise your presentation but do not learn it word for word.
- Have bullet point notes to help prompt you in **Part 1** but not the 'full speech'. You will be tempted to read it or, at the very least, deliver it without appropriate liveliness and intonation. 'Talk through' each bullet point in a confident and enthusiastic way.
- Structure your Individual Talk carefully, making sure that it develops points and stays within the 3 – 4 minutes allowed. Long talks do not earn more marks! On the contrary, an overly long talk will be regarded as not being 'well organised' (a requirement for Level 5 marks).
- Respond to the prompts and questions from the Examiner in **Part 2** as fully as possible by developing your ideas, giving examples and leading off into other aspects of the topic if you can.
- Watch examples of speeches/presentations/talks to learn how effective speakers make their speeches engaging and interesting and how they incorporate effective language devices. Try to copy these techniques.
- Practise simulations of **Part 2**. There are as many marks available for **Part 2** as for **Part 1** so treat each part as equally important.

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Cambridge Assessment International Education

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CANDIDATE NAME									
CENTRE NUMBER						CANDIDATE NUMBER			

0123456789

FIRST LANGUAGE ENGLISH **0500/01**

Paper 1 Reading **For examination from 2020**

SPECIMEN PAPER **2 hours**

You must answer on the question paper.

You will need: Insert (enclosed)

INSTRUCTIONS

- Answer **all** questions.
- Use a black or dark blue pen.
- Write your name, centre number and candidate number in the boxes at the top of the page.
- Write your answer to each question in the space provided.
- Do **not** use an erasable pen or correction fluid.
- Do **not** write on any bar codes.
- If additional space is needed, you should use the lined pages at the end of this booklet; the question number or numbers must be clearly shown.
- Dictionaries are **not** allowed.

INFORMATION

- The total mark for this paper is 80.
- The number of marks for each question or part question is shown in brackets [ ].
- The insert contains the reading texts.

This document has **14** pages. Blank pages are indicated.

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Read **Text A**, ***Project Mammoth***, in the insert and then answer **Questions 1(a)–(e)** on this question paper.

Question 1

(a) Give **two** examples of extinct species (other than the mammoth) according to the text.

- .....
- ..... [1]

(b) **Using your own words**, explain what the text means by:

(i) 'candidates for "de-extinction"' (line 2): .....

..... [2]

(ii) 'not just distant dreams.' (line 5): .....

..... [2]

(c) Re-read paragraph 3, ('Scientists working on such projects … climate change.').

Give **two** reasons why scientists might be excited by the possible birth of a woolly mammoth.

- .....
- ..... [2]

(d) Re-read paragraphs 4 and 5, ('The basic idea … Siberia's permafrost.').

(i) Identify **two** main tasks that scientists will need to complete in order to breed the hybrid.

- .....
- ..... [2]

(ii) Explain why Asian elephants were chosen for Project Mammoth.

.....

.....

..... [3]

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(e) Re-read paragraphs 6 and 7, ('The project is not without ... chance of survival.').

Using your own words, explain why some people disagree with Project Mammoth.

.....

.....

..... [3]

Read **Text B**, ***Waking the Baby Mammoth***, in the insert and then answer **Question 1(f)** on this question paper.

Question 1

(f) According to Text B, what made Lyuba such a remarkable and precious scientific specimen **and** what did scientists hope to discover by studying her?

You must **use continuous writing** (not note form) and **use your own words** as far as possible.

Your summary should not be more than 120 words.

Up to 10 marks are available for the content of your answer and up to 5 marks for the quality of your writing.

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Read **Text C**, ***The Gift***, in the insert and then answer **Questions 2(a)–(d)** on this question paper.

Question 2

(a) **Identify a word or phrase from the text** which suggests the same idea as the words underlined:

(i) Natalia was expecting the quietness of their walk to be broken suddenly.

..... [1]

(ii) Natalia slowed herself down and made herself as tall as possible before refusing to go any further.

..... [1]

(iii) Her grandfather spoke to her in a low, angry voice.

..... [1]

(iv) The homeless person was fast asleep.

..... [1]

(b) **Using your own words**, explain what the writer means by each of the words underlined:

I peered out into the street. On the other side, there was a street lamp with a dying bulb. I was opening my mouth to say 'What?' and then I saw it. Half a block from us, an enormous shadow was moving along the street.

(i) peered ..... [1]

(ii) dying ..... [1]

(iii) enormous ..... [1]

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(c) Use **one** example from the text below to explain how the writer suggests Natalia's experiences and feelings that night.

Use your own words in your explanation.

I peered out into the street. On the other side, there was a street lamp with a dying bulb. I was opening my mouth to say 'What?' and then I saw it. Half a block from us, an enormous shadow was moving along the street.

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..... [3]

(d) Re-read paragraphs 9 and 12.

- Paragraph 9 begins 'At first I thought it was a tram …' and is about the elephant and how it was moving when Natalia first saw it.
- Paragraph 12 begins 'Its ears were folded back …' and gives Natalia's impression of the elephant as she watches it come towards her.

Explain how the writer uses language to convey meaning and to create effect in these paragraphs. Choose **three** examples of words or phrases from **each** paragraph to support your answer. Your choices should include the use of imagery.

Write about 200 to 300 words.

Up to 15 marks are available for the content of your answer.

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Re-read **Text C**, ***The Gift***, in the insert and then answer **Question 3** on this question paper.

Question 3

You are the grandfather. Some years later you are interviewed about your memories of that night for a radio programme about local history. The interviewer asks you the following three questions only:

- What did you see **and** feel during your journeys through the city that night?
- What do you remember of your granddaughter's behaviour **and** reactions that night?
- What were your reasons for taking your granddaughter out that night **and** what do you think she gained from the experience?

Write the words of the interview.

Base your interview on what you have read in **Text C**, but be careful to use your own words. Address each of the three bullet points.

Begin your interview with the first question.

Write about 250 to 350 words.

Up to 15 marks are available for the content of your answer and up to 10 marks for the quality of your writing.

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Additional Page

If you use the following lined page to complete the answer(s) to any question(s), the question number(s) must be clearly shown.

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Question 1f	© *Waking The Baby Mammoth*; National Geographic; 12 April 2009. © *Biochemical Soul*; http://biochemicalsoul.com/tag/waking-the-baby-mammoth/
Questions 2 & 3	© Téa Obreht; *The Tigers Wife*; Weidenfeld & Nicolson; 2011.

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FIRST LANGUAGE ENGLISH **0500/02**

Paper 2 Directed Writing and Composition **For examination from 2020**

SPECIMEN INSERT **2 hours**

0123456789

INFORMATION

- This insert contains the reading texts.
- You may annotate this insert and use the blank spaces for planning. **Do not write your answers** on the insert.

This document has **4** pages. Blank pages are indicated.

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Read **both** texts, and then answer **Question 1** on the question paper.

Text A

The following passage is an article from a local newspaper about a school in the area and the future of its school council.

Student representation: Do we <u>really</u> care what students think?

The once fashionable idea of giving students a say in how their schools are run is being challenged by a recently appointed head teacher as 'mere lip service to student participation.' As is now common in many schools, students in Mr Aziz's school elect representatives from each year group to attend meetings and discuss their concerns with the school authorities. But Mr Aziz believes that these school councils do more harm than good, draining students' and teachers' energies on a fake body whose decisions do not, and should not, influence children's education. 'The misguided belief that young people should be able to limit the actions of experienced educators is simply wrong,' he says. 'We're accountable to their parents to give them the best education: we cannot waste their time and ours consulting them at every stage about issues which they don't understand.'

One pupil, Sofia, who campaigned enthusiastically over a whole term for the votes of her Year 11 classmates last year, gave Mr Aziz some unexpected support. 'The school council meets every now and then to give the impression that students have a say, but nothing ever happens. We spent ages working on a report about improvements we wanted to see in the school – sensible things like more gym equipment and a wider curriculum. The teachers listened politely but the report was ignored. In class our teachers were even irritated that our homework was late because of all the planning involved!' Sofia's dad also had misgivings. 'We selected this school for its solid academic record. My daughter's here to learn – and I'm paying a lot for that,' he adds wryly.

Mr Aziz says it makes sense to be concerned about individual students' worries and ideas and his door is always open to those who are unhappy about any aspect of school life. 'And I encourage teachers to listen to their students and pass on any concerns to me,' he said. 'But one pupil told me the older representatives on the school council should even be consulted on teacher appointments! I have twenty years' experience to ensure that students leave my school with good academic results and the skills to become useful adults. Student representatives can't and shouldn't interfere with that.'

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Text B

The following passage is taken from a guide for teachers about setting up school councils.

There's a transformation taking place for thousands of school students all over the country and it's thanks to their enlightened approach to student participation. This Guide contains some good examples of including children and young people in decision-making. We have also included some simple pointers of what makes an effective school council.

Recent research has shown that if a school places the involvement of their students at the heart of everything they do, the benefits and opportunities for them, and for the school, are significantly increased. But it takes real commitment, not just lip service. Young people are very astute. They will quickly identify a lack of commitment and if they do, they will soon become disillusioned. Set out clear aims, explaining what participation is, why it's important, and how to get involved. State clearly what you're prepared to commit and what you expect from them.

The most effective participation is when pupils have a say on the 'real' issues that affect their school. For example, invite them to help shape key policies for the future. Empower them with the responsibility of helping to regulate behaviour, bullying or the environment. Give them the opportunity to influence the development of the curriculum or new teaching initiatives. Give children and young people the chance to make a difference and you'll see the difference … in their attitude to school, to learning, to their teachers and to their peers.

Talk to anyone associated with a school that has a strong student participation policy and they are unanimous in the belief that empowering children and young people in this way has changed school life for the better. Behaviour, attendance and results can improve because more children and young people acquire the self-esteem that comes from improved communication, negotiation and decision-making skills. Children and young people can provide a fresh, new perspective. They see things differently and, because any decision will directly impact on their lives, they often have very clear views and opinions.

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FIRST LANGUAGE ENGLISH **0500/02**

Paper 2 Directed Writing and Composition **For examination from 2020**

MARK SCHEME

Maximum Mark: 80

Specimen

This document has **12** pages. Blank pages are indicated.

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Generic Marking Principles

These general marking principles must be applied by all examiners when marking candidate answers. They should be applied alongside the specific content of the mark scheme or generic level descriptors for a question. Each question paper and mark scheme will also comply with these marking principles.

GENERIC MARKING PRINCIPLE 1:

Marks must be awarded in line with:

- the specific content of the mark scheme or the generic level descriptors for the question
- the specific skills defined in the mark scheme or in the generic level descriptors for the question
- the standard of response required by a candidate as exemplified by the standardisation scripts.

GENERIC MARKING PRINCIPLE 2:

Marks awarded are always **whole marks** (not half marks, or other fractions).

GENERIC MARKING PRINCIPLE 3:

Marks must be awarded **positively**:

- marks are awarded for correct/valid answers, as defined in the mark scheme. However, credit is given for valid answers which go beyond the scope of the syllabus and mark scheme, referring to your Team Leader as appropriate
- marks are awarded when candidates clearly demonstrate what they know and can do
- marks are not deducted for errors
- marks are not deducted for omissions
- answers should only be judged on the quality of spelling, punctuation and grammar when these features are specifically assessed by the question as indicated by the mark scheme. The meaning, however, should be unambiguous.

GENERIC MARKING PRINCIPLE 4:

Rules must be applied consistently e.g. in situations where candidates have not followed instructions or in the application of generic level descriptors.

GENERIC MARKING PRINCIPLE 5:

Marks should be awarded using the full range of marks defined in the mark scheme for the question (however; the use of the full mark range may be limited according to the quality of the candidate responses seen).

GENERIC MARKING PRINCIPLE 6:

Marks awarded are based solely on the requirements as defined in the mark scheme. Marks should not be awarded with grade thresholds or grade descriptors in mind.

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Note: All examiners are instructed that alternative correct answers and unexpected approaches in candidates' scripts must be given marks that fairly reflect the relevant knowledge and skills demonstrated. Nonetheless, the content must be clearly related to and derived from the text.

Section A: Directed Writing

Question 1

This question tests the following writing assessment objectives (25 marks)

W1 articulate experience and express what is thought, felt and imagined
W2 organise and structure ideas and opinions for deliberate effect
W3 use a range of vocabulary and sentence structures appropriate to context
W4 use register appropriate to context
W5 make accurate use of spelling, punctuation and grammar.

and reading assessment objectives (15 marks)

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R3 analyse, evaluate and develop facts, ideas and opinions, using appropriate support from the text
R5 select and use information for specific purposes.

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Question	Answer	Marks
1	**Imagine you are a pupil in a school which does not have a school council.** **<u>Write a speech</u> to be given in a school assembly, giving your views on whether or not students should participate in decisions made about the school.** **In your speech you should:** • **evaluate the views given in both texts about student participation** • **give your own views, based on what you have read, about whether a school council would benefit students and teachers.** **Base your speech on what you have read in <u>both</u> texts, but be careful to use your own words. Address both of the bullet points.** **Begin your speech: 'Thank you for coming to listen to me today …'.** **Write about 250 to 350 words.** **<u>Up to 15 marks are available for the content of your answer, and up to 25 marks for the quality of your writing.</u>** Notes on task: **Responses *might* use the following ideas:** **Text A** • 'once fashionable' – student representation may just be a passing fad • School councils take up too much time and energy from students and teachers • 'lip service' – if student representation is fake, it has no substance • Teachers are accountable to parents and should put education first • Experienced teachers should make decisions, not children **Text B** • An 'enlightened' approach is needed to make school councils work • Student participation is very popular and well regarded • Student participation works when children are involved in 'real' issues • Students can take responsibility for difficult problems, e.g. behaviour • Participation can make a difference to students' attitudes to school • Attendance and results are improved by participation • Students can learn important skills, e.g. negotiation, communication, decision-making • Students can have a fresh eye on issues • Decisions made may have a major impact on them so they are motivated to participate	**40**

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Question	Answer	Marks
1	**Possible evaluation of ideas:** **Text A** • School councils may indeed be pointless if students' decisions are not valued • Mr Aziz suggests students have little experience to bring to decisions about school • The main function of a school is to educate – this has implications for student participation **Text B** • Student representation on its own is not enough – needs planning • Some quite ambitious claims are made about its benefits – are these realistic? • Not much is said about how much time and commitment it takes – just that it should be spelt out **Possible synthesis of ideas:** Text A seems to illustrate a different approach to education/the purpose of schools from Text B. The approach in Text A is based on the authority of the teacher/lack of trust in students, whereas the approach in Text B is based on the teacher as facilitator/faith in students to make good decisions – candidates' own views may reflect this. Text A shows some ridicule towards student participation while Text B enthuses about it – the candidate may suggest these are both extremes and the truth lies somewhere in between. The 'it all depends' approach may show synthesis of ideas – Mr Aziz's cynicism means student participation would never work but students' 'fresh eye' on difficult problems might work.	

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Marking criteria for Section A Question 1

Table A, Writing

Use the following table to give a mark out of 25 for writing.

Level	Marks	Description
6	**22–25**	• Highly effective style capable of conveying subtle meaning. (W1) • Carefully structured for benefit of the reader. (W2) • Wide range of sophisticated vocabulary, precisely used. (W3) • Highly effective register for audience and purpose. (W4) • Spelling, punctuation and grammar almost always accurate. (W5)
5	**18–21**	• Effective style. (W1) • Secure overall structure, organised to help the reader. (W2) • Wide range of vocabulary, used with some precision. (W3) • Effective register for audience and purpose. (W4) • Spelling, punctuation and grammar mostly accurate, with occasional minor errors. (W5)
4	**14–17**	• Sometimes effective style. (W1) • Ideas generally well sequenced. (W2) • Range of vocabulary is adequate and sometimes effective. (W3) • Sometimes effective register for audience and purpose. (W4) • Spelling, punctuation and grammar generally accurate though with some errors. (W5)
3	**10–13**	• Inconsistent style, expression sometimes awkward but meaning clear. (W1) • Relies on the sequence of the original text. (W2) • Vocabulary is simple, limited in range or reliant on the original text. (W3) • Some awareness of an appropriate register for audience and purpose. (W4) • Frequent errors of spelling, punctuation and grammar, sometimes serious. (W5)
2	**6–9**	• Limited style. (W1) • Response is not well sequenced. (W2) • Limited vocabulary or words/phrases copied from the original text. (W3) • Limited awareness of appropriate register for audience and purpose. (W4) • Persistent errors of spelling, punctuation and grammar. (W5)
1	**1–5**	• Expression unclear. (W1) • Poor sequencing of ideas. (W2) • Very limited vocabulary or copying from the original text. (W3) • Very limited awareness of appropriate register for audience and purpose. (W4) • Persistent errors in spelling, punctuation and grammar impede communication. (W5)
0	**0**	• No creditable content.

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Table B, Reading

Use the following table to give a mark out of 15 for reading.

Level	Marks	Description
6	**13–15**	• Successfully evaluates ideas and opinions, both explicit and implicit. (R1, R2, R3) • Assimilates ideas from the text to give a developed, sophisticated response. (R3, R5)
5	**10–12**	• Some successful evaluation of ideas and opinions, both explicit and implicit. (R1, R2, R3) • A thorough response, supported by a detailed selection of relevant ideas from the text. (R3, R5)
4	**7–9**	• Begins to evaluate mainly explicit ideas and opinions. (R1, R2, R3) • An appropriate response that includes relevant ideas from the text. (R3, R5)
3	**5–6**	• Selects and comments on explicit ideas and opinions. (R1, R2, R3) • Makes a general response including a few relevant ideas from the text. (R3, R5)
2	**3–4**	• Identifies explicit ideas and opinions. (R1, R2, R3) • Makes a limited response with little evidence from the text. (R3, R5)
1	**1–2**	• Very limited response with minimal relation to the text. (R1, R2, R3, R5)
0	**0**	• No creditable content.

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Section B: Composition

Questions 2, 3, 4 or 5

This question tests the following writing assessment objectives (40 marks)

W1 articulate experience and express what is thought, felt and imagined
W2 organise and structure ideas and opinions for deliberate effect
W3 use a range of vocabulary and sentence structures appropriate to context
W4 use register appropriate to context
W5 make accurate use of spelling, punctuation and grammar.

Question	Answer	Marks
2	**EITHER** **Describe an occasion when a group of people are eating together.** Use Table A to give a mark out of 16 for content and structure, and Table B to give a mark out of 24 for style and accuracy.	**40**

Question	Answer	Marks
3	**OR** **Describe a busy train or bus station.** Use Table A to give a mark out of 16 for content and structure, and Table B to give a mark out of 24 for style and accuracy.	**40**

Question	Answer	Marks
4	**OR** **Write a story that includes the words, '… nothing could have prepared him for what he saw …'.** Use Table A to give a mark out of 16 for content and structure, and Table B to give a mark out of 24 for style and accuracy.	**40**

Question	Answer	Marks
5	**OR** **Write a story that involves a character new to the area.** Use Table A to give a mark out of 16 for content and structure, and Table B to give a mark out of 24 for style and accuracy.	**40**

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Marking criteria for Section B

Table A, Composition: Content and structure

<table>
<tr><th>Level</th><th>Marks</th><th colspan="2">General and specific marking criteria</th></tr>
<tr><td rowspan="2">6</td><td rowspan="2">14–16</td><td colspan="2">General

• Content is complex, engaging and effective. (W1)
• Structure is secure, well balanced and carefully managed for deliberate effect. (W2)</td></tr>
<tr><td>Specific – descriptive

Many well-defined and developed ideas and images create a convincing overall picture with varieties of focus.</td><td>Specific – narrative

The plot is well-defined and strongly developed with features of fiction writing such as description, characterisation and effective climax, and convincing details.</td></tr>
<tr><td rowspan="2">5</td><td rowspan="2">11–13</td><td colspan="2">General

• Content is developed, engaging and effective. (W1)
• Structure is well managed, with some choices made for deliberate effect. (W2)</td></tr>
<tr><td>Specific – descriptive

Frequent, well-chosen images and details give a mostly convincing picture.</td><td>Specific – narrative

The plot is defined and developed with features of fiction writing such as description, characterisation, climax and details.</td></tr>
<tr><td rowspan="2">4</td><td rowspan="2">8–10</td><td colspan="2">General

• Content is relevant with some development. (W1)
• Structure is competently managed. (W2)</td></tr>
<tr><td>Specific – descriptive

A selection of relevant ideas, images and details, even where there is a tendency to write in a narrative style.</td><td>Specific – narrative

The plot is relevant and cohesive, with some features such as characterisation and setting of scene.</td></tr>
<tr><td rowspan="2">3</td><td rowspan="2">5–7</td><td colspan="2">General

• Content is straightforward and briefly developed. (W1)
• Structure is mostly organised but may not always be effective. (W2)</td></tr>
<tr><td>Specific – descriptive

The task is addressed with a series of relevant but straightforward details, which may be more typical of a narrative.</td><td>Specific – narrative

The plot is straightforward, with limited use of the features of narrative writing.</td></tr>
</table>

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<table>
<tr><th>Level</th><th>Marks</th><th colspan="2">General and specific marking criteria</th></tr>
<tr><td rowspan="2">2</td><td rowspan="2">3–4</td><td colspan="2">General

• Content is simple, and ideas and events may be limited. (W1)
• Structure is partially organised but limited in its effect. (W2)</td></tr>
<tr><td>Specific – descriptive

The recording of some relevant events with limited detail.</td><td>Specific – narrative

The plot is a simple narrative that may consist of events that are only partially linked and/or which are presented with partial clarity.</td></tr>
<tr><td rowspan="2">1</td><td rowspan="2">1–2</td><td colspan="2">General

• Content is occasionally relevant or clear. (W1)
• Structure is limited and ineffective. (W2)</td></tr>
<tr><td>Specific – descriptive

The description is unclear and lacks detail.</td><td>Specific – narrative

The plot and/or narrative lacks coherence.</td></tr>
<tr><td>0</td><td>0</td><td colspan="2">• No creditable content.</td></tr>
</table>

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Table B, Composition: Style and accuracy

Level	Marks	Description
6	**21–24**	• Precise, well-chosen vocabulary and varied sentence structures, chosen for effect. (W3) • Consistent well-chosen register suitable for the context. (W4) • Spelling, punctuation and grammar almost always accurate. (W5)
5	**17–20**	• Mostly precise vocabulary and a range of sentence structures mostly used for effect. (W3) • Mostly consistent appropriate register suitable for the context. (W4) • Spelling, punctuation and grammar mostly accurate, with occasional minor errors. (W5)
4	**13–16**	• Some precise vocabulary and a range of sentence structures sometimes used for effect. (W3) • Some appropriate register for the context. (W4) • Spelling, punctuation and grammar generally accurate, but with some errors. (W5)
3	**9–12**	• Simple vocabulary and a range of straightforward sentence structures. (W3) • Simple register with a general awareness of the context. (W4) • Frequent errors of spelling, punctuation and grammar, occasionally serious. (W5)
2	**5–8**	• Limited and/or imprecise vocabulary and sentence structures. (W3) • Limited and/or imprecise register for the context. (W4) • Persistent errors of spelling, punctuation and grammar. (W5)
1	**1–4**	• Frequently imprecise vocabulary and sentence structures. (W3) • Register demonstrates little or no sense of the context. (W4) • Persistent errors of spelling, punctuation and grammar impair communication. (W5)
0	**0**	• No creditable content.

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CANDIDATE NAME									
CENTRE NUMBER						CANDIDATE NUMBER			

0123456789

FIRST LANGUAGE ENGLISH **0500/02**

Paper 2 Directed Writing and Composition **For examination from 2020**

SPECIMEN PAPER **2 hours**

You must answer on the question paper.

You will need: Insert (enclosed)

INSTRUCTIONS

- Answer **two** questions in total:
  - Section A: answer **Question 1**.
  - Section B: answer **one** question.
- Use a black or dark blue pen.
- Write your name, centre number and candidate number in the boxes at the top of the page.
- Write your answer to each question in the space provided.
- Do **not** use an erasable pen or correction fluid.
- Do **not** write on any bar codes.
- If additional space is needed, you should use the lined pages at the end of this booklet; the question number or numbers must be clearly shown.
- Dictionaries are **not** allowed.

INFORMATION

- The total mark for this paper is 80.
- The number of marks for each question or part question is shown in brackets [ ].
- The insert contains the reading texts.

This document has **12** pages. Blank pages are indicated.

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Read Text A and Text B in the insert and then answer **Section A, Question 1** on this question paper.

Section A: Directed Writing

Question 1

Imagine you are a pupil in a school which does not have a school council.

Write a speech to be given in a school assembly, giving your views on whether or not students should participate in decisions made about the school.

In your speech you should:
- evaluate the views given in both texts about student participation
- give your own views, based on what you have read, about whether a school council would benefit students and teachers.

Base your speech on what you have read in **both** texts, but be careful to use your own words. Address both of the bullet points.

Begin your speech: 'Thank you for coming to listen to me today …'.

Write about 250 to 350 words.

Up to 15 marks are available for the content of your answer, and up to 25 marks for the quality of your writing.

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[Turn over

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[Turn to page 6 for Section B]

Section B: Composition

Answer **one** question from Section B.

Write about 350 to 450 words on **one** of the following questions. Answer on this question paper.

Up to 16 marks are available for the content and structure of your answer, and up to 24 marks for the style and accuracy of your writing.

EITHER

Descriptive writing

2 Describe an occasion when a group of people are eating together.

OR

Descriptive writing

3 Describe a busy train or bus station.

OR

Narrative writing

4 Write a story that includes the words, '… nothing could have prepared him for what he saw …'.

OR

Narrative writing

5 Write a story that involves a character new to the area.

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Please write your chosen question number here (**2**, **3**, **4**, **5**): .....

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Additional Page

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Syllabus

Cambridge IGCSE™

First Language English 0500

Use this syllabus for exams in 2024, 2025 and 2026.
Exams are available in the June and November series.
Exams are also available in the March series in India only.



Version 1

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Feedback from: Christoph Guttentag, Dean of Undergraduate Admissions, Duke University, USA

Quality management

Cambridge International is committed to providing exceptional quality. In line with this commitment, our quality management system for the provision of international qualifications and education programmes for students aged 5 to 19 is independently certified as meeting the internationally recognised standard, ISO 9001:2015. Learn more at **www.cambridgeinternational.org/ISO9001**

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Important: Changes to this syllabus

For information about changes to this syllabus for 2024, 2025 and 2026, go to page 35.

The latest syllabus is version 1, published September 2021.

Any textbooks endorsed to support the syllabus for examination from 2020 are still suitable for use with this syllabus.

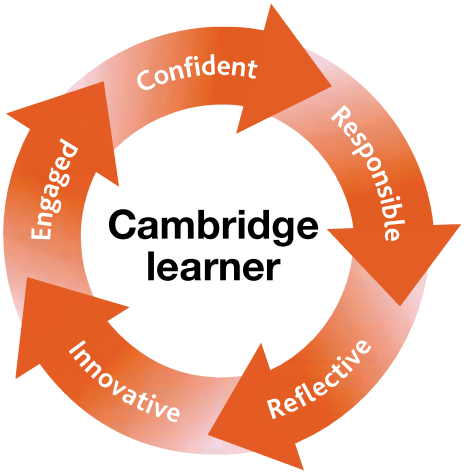
1 Why choose this syllabus?

Key benefits

Cambridge IGCSE is the world's most popular international qualification for 14 to 16 year olds, although it can be taken by students of other ages. It is tried, tested and trusted.

Students can choose from 70 subjects in any combination – it is taught by over 4500 schools in over 140 countries.

Our programmes balance a thorough knowledge and understanding of a subject and help to develop the skills learners need for their next steps in education or employment.



Cambridge IGCSE First Language English allows learners to:

- develop the ability to communicate clearly, accurately and effectively when speaking and writing
- learn how to use a wide range of vocabulary, and the correct grammar, spelling and punctuation
- develop a personal style and an awareness of the audience being addressed.

Learners are also encouraged to read widely, both for their own enjoyment and to further their awareness of the ways in which English can be used. Cambridge IGCSE First Language English also develops more general analysis and communication skills such as inference, and the ability to order facts and present opinions effectively.

School feedback: 'The strength of Cambridge IGCSE qualifications is internationally recognised and has provided an international pathway for our students to continue their studies around the world.'

Feedback from: Gary Tan, Head of Schools and CEO, Raffles International Group of Schools, Indonesia

International recognition and acceptance

Our expertise in curriculum, teaching and learning, and assessment is the basis for the recognition of our programmes and qualifications around the world. The combination of knowledge and skills in Cambridge IGCSE First Language English gives learners a solid foundation for further study. Candidates who achieve grades A* to C are well prepared to follow a wide range of courses including Cambridge International AS & A Level English Language.

Cambridge IGCSEs are accepted and valued by leading universities and employers around the world as evidence of academic achievement. Many universities require a combination of Cambridge International AS & A Levels and Cambridge IGCSEs or equivalent to meet their entry requirements.

UK NARIC, the national agency in the UK for the recognition and comparison of international qualifications and skills, has carried out an independent benchmarking study of Cambridge IGCSE and found it to be comparable to the standard of the reformed GCSE in the UK. This means students can be confident that their Cambridge IGCSE qualifications are accepted as equivalent to UK GCSEs by leading universities worldwide.

Learn more at **www.cambridgeinternational.org/recognition**

School feedback: 'Cambridge IGCSE is one of the most sought-after and recognised qualifications in the world. It is very popular in Egypt because it provides the perfect preparation for success at advanced level programmes.'

Feedback from: Managing Director of British School in Egypt BSE

Supporting teachers

We provide a wide range of resources, detailed guidance and innovative training and professional development so that you can give your students the best possible preparation for Cambridge IGCSE. To find out which resources are available for each syllabus go to our School Support Hub.

The School Support Hub is our secure online site for Cambridge teachers where you can find the resources you need to deliver our programmes. You can also keep up to date with your subject and the global Cambridge community through our online discussion forums.

Find out more at **www.cambridgeinternational.org/support**

Support for Cambridge IGCSE			
Planning and preparation • Next steps guides. • Schemes of work. • Specimen papers. • Syllabuses. • Teacher guides.	**Teaching and assessment** • Endorsed resources. • Online forums. • Support for coursework and speaking tests.	**Learning and revision** • Example candidate responses. • Past papers and mark schemes. • Specimen paper answers.	**Results** • Candidate Results Service. • Principal examiner reports for teachers. • Results Analysis.

Sign up for email notifications about changes to syllabuses, including new and revised products and services at **www.cambridgeinternational.org/syllabusupdates**

Professional development

We support teachers through:

- Introductory Training – face-to-face or online
- Extension Training – face-to-face or online
- Enrichment Professional Development – face-to-face or online

Find out more at **www.cambridgeinternational.org/events**

- Cambridge Professional Development Qualifications

Find out more at **www.cambridgeinternational.org/profdev**

Supporting exams officers

We provide comprehensive support and guidance for all Cambridge exams officers.
Find out more at: **www.cambridgeinternational.org/eoguide**

2 Syllabus overview

Aims

The aims describe the purposes of a course based on this syllabus.

The aims are to enable students to:

- read a wide range of texts, fluently and with good understanding, enjoying and appreciating a variety of language
- read critically, and use knowledge gained from wide reading to inform and improve their own writing
- write accurately and effectively, using Standard English appropriately
- work with information and with ideas in language by developing skills of evaluation, analysis, use and inference
- listen to, understand, and use spoken language effectively
- acquire and apply a wide vocabulary, alongside a knowledge and understanding of grammatical terminology and linguistic conventions.

Content overview

Cambridge IGCSE First Language English offers candidates the opportunity to respond with understanding to a rich array of reading texts during the course as a whole. Candidates will use these texts to inform and inspire their own writing, and write in a range of text types for different purposes and audiences.

Candidates will develop both their speaking and their listening skills, delivering a presentation, and responding to questions and engaging in conversations.

Candidates are encouraged to become appreciative and critical readers, writers, speakers and listeners.

Cambridge Assessment International Education is an education organisation and politically neutral. The contents of this syllabus, examination papers and associated materials do not endorse any political view. We endeavour to treat all aspects of the exam process neutrally.

Assessment overview

All candidates take two papers. Paper 1, and one of Paper 2 or Component 3. Candidates will be eligible for grades A* to G. Component 4 is optional and assesses speaking and listening skills. This component is separately endorsed and marks will not contribute to a candidate's overall grade.

All candidates take:

Paper 1 2 hours
Reading 50%
80 marks
Structured and extended writing questions
Questions will be based on three reading texts
Externally assessed

and:

Paper 2 2 hours
Directed Writing and Composition 50%
80 marks
Extended writing question and a composition task
Externally assessed

or:

Component 3
Coursework Portfolio 50%
80 marks
Three extended writing assignments
Internally assessed and externally moderated

Centres may also choose to enter candidates for the Speaking and Listening Test. Marks for this optional component do not contribute to the overall grade candidates receive for the written components. Instead, where candidates perform to an appropriate standard, certificates record achievement of grades 1 (high) to 5 (low).

Candidates can also take:

Component 4 Approx. 10–12 minutes
Speaking and Listening Test
40 marks Separately endorsed
Individual Talk and Conversation
Internally assessed and externally moderated

Information on availability is in the **Before you start section.**

Check the timetable at **www.cambridgeinternational.org/timetables** for the test date window for Component 4.

Check the samples database at **www.cambridgeinternational.org/samples** for submission information, forms and deadlines for Components 3 and 4.

Assessment objectives

The assessment objectives (AOs) are:

AO1 Reading

Candidates will be assessed on their ability to:

R1 demonstrate understanding of explicit meanings

R2 demonstrate understanding of implicit meanings and attitudes

R3 analyse, evaluate and develop facts, ideas and opinions, using appropriate support from the text

R4 demonstrate understanding of how writers achieve effects and influence readers

R5 select and use information for specific purposes.

AO2 Writing

Candidates will be assessed on their ability to:

W1 articulate experience and express what is thought, felt and imagined

W2 organise and structure ideas and opinions for deliberate effect

W3 use a range of vocabulary and sentence structures appropriate to context

W4 use register appropriate to context

W5 make accurate use of spelling, punctuation and grammar.

AO3 Speaking and Listening

Candidates will be assessed on their ability to:

SL1 articulate experience and express what is thought, felt and imagined

SL2 present facts, ideas and opinions in a cohesive order which sustains the audience's interest

SL3 communicate clearly and purposefully using fluent language

SL4 use register appropriate to context

SL5 listen and respond appropriately in conversation.

Weighting for assessment objectives

The approximate weightings allocated to each of the assessment objectives (AOs) are summarised below.

Assessment objectives as a percentage of the qualification

Assessment objective	Weighting in IGCSE %
AO1 Reading	50
AO2 Writing	50
AO3 Speaking and listening	Separately endorsed
Total	100

Assessment objectives as a percentage of each component

Assessment objective	Weighting in components %		
	Paper 1	Paper 2 and Component 3	Component 4
AO1 Reading	80	20	0
AO2 Writing	20	80	0
AO3 Speaking and listening	0	0	100
Total	100	100	100

3 Subject content

This syllabus gives you the flexibility to design a course that will interest, challenge and engage your learners. Where appropriate you are responsible for selecting suitable subject contexts, resources and examples to support your learners' study. These should be appropriate for the learners' age, cultural background and learning context as well as complying with your school policies and local legal requirements.

The skills covered in the syllabus are outlined below.

Reading

- Demonstrate understanding of written texts, and of the words and phrases within them
- Summarise and use material for a specific context
- Develop, analyse and evaluate facts, ideas and opinions
- Demonstrate understanding of how writers achieve their effects and influence readers
- Select appropriate information for specific purposes
- Recognise and respond to linguistic devices, figurative language and imagery.

In developing reading skills, candidates should engage with a range of genres and text types from the twentieth and/or twenty-first centuries, including literature, fiction and non-fiction, and other forms of writing, such as discursive essays, reviews and articles. This study should include focus on writers' use of language and style and the ways in which writers achieve effects and influence readers. Candidates should study how influence may include fact, ideas, perspectives, opinions and bias.

Writing

- Express what is thought, felt and imagined
- Organise and convey facts, ideas and opinions effectively
- Demonstrate a varied vocabulary appropriate to the context
- Demonstrate an effective use of sentence structures
- Demonstrate an understanding of audience, purpose and form
- Demonstrate accuracy in spelling, punctuation and grammar.

As developing writers themselves, candidates should be introduced to a range of writing skills, including the ability to create and compose texts with a variety of forms and purposes, e.g. descriptive, narrative, discursive, argumentative and persuasive. This study should include focus on the following text types: letter, report, article, journal, speech, interview and summary.

Speaking and Listening

- Describe and reflect on experience, and express what is thought, felt and imagined
- Organise and convey facts, ideas and opinions effectively
- Understand and convey complex ideas
- Communicate with clarity, focus and purpose
- Communicate appropriately for the context
- Engage appropriately in conversation.

Candidates should explore a range of speaking and listening skills, including the ability to participate in engaging conversations and to respond spontaneously to questions and prompts. This study should include focus on presentation skills in employing and organising content, and language devices, such as irony, tone and emphasis.

4 Details of the assessment

Paper 1 Reading

Written paper, 2 hours, 80 marks

Candidates answer three compulsory questions on three texts which may be on a similar topic. Candidates write all their answers in the space provided on the question paper.

Text A and Text B will be 700–750 words in length and Text C will be 500–650 words in length. Candidates should spend approximately 15 minutes reading the texts.

The texts will be printed on the question paper insert.

Dictionaries may **not** be used.

Question 1 Comprehension and summary task (30 marks)

Comprehension task: this question requires candidates to respond to Text A.

Candidates respond to a series of sub-questions. These include short answers testing understanding of both explicit and implicit meanings.

This question tests the following reading assessment objectives (15 marks):

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R5 select and use information for specific purposes.

Summary task: this question requires candidates to respond to Text B.

Candidates answer a selective summary task in their own words. Candidates write their summary as continuous writing of no more than 120 words.

This question tests the following reading assessment objectives (10 marks):

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R5 select and use information for specific purposes.

This question also tests the following writing assessment objectives (5 marks):

W2 organise and structure ideas and opinions for deliberate effect
W3 use a range of vocabulary and sentence structures appropriate to context.

Question 2 Short-answer questions and language task (25 marks)

Short-answer questions: this question requires candidates to respond to Text C.

Candidates respond to a series of sub-questions which require answers of different lengths.

This question tests the following reading assessment objectives (10 marks):

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R4 demonstrate understanding of how writers achieve effects and influence readers.

Language task: this question requires candidates to respond to Text C.

Candidates write about 200–300 words.

This question tests the following reading assessment objectives (15 marks):

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R4 demonstrate understanding of how writers achieve effects and influence readers.

Question 3 Extended response to reading (25 marks)

This question requires candidates to respond to Text C.

Candidates write about 250–350 words, responding in one of the following text types: letter, report, journal, speech, interview and article.

This question tests the following reading assessment objectives (15 marks):

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R3 analyse, evaluate and develop facts, ideas and opinions, using appropriate support from the text.

This question also tests the following writing assessment objectives (10 marks):

W1 articulate experience and express what is thought, felt and imagined
W2 organise and structure ideas and opinions for deliberate effect
W3 use a range of vocabulary and sentence structures appropriate to context
W4 use register appropriate to context.

Paper 2 Directed Writing and Composition

Written paper, 2 hours, 80 marks

Candidates answer two questions, one from each section.

The texts will be printed on the question paper insert.

Dictionaries may **not** be used.

Section A Directed Writing (40 marks)

Candidates answer one compulsory question on one or two texts totalling 650–750 words in length.

Candidates use, develop and evaluate the information in the text(s) to create a discursive/argumentative/persuasive speech, letter or article.

Candidates write about 250–350 words.

This question tests the following writing assessment objectives (25 marks):

W1 articulate experience and express what is thought, felt and imagined
W2 organise and structure ideas and opinions for deliberate effect
W3 use a range of vocabulary and sentence structures appropriate to context
W4 use register appropriate to context
W5 make accurate use of spelling, punctuation and grammar.

This question also tests the following reading assessment objectives (15 marks):

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R3 analyse, evaluate and develop facts, ideas and opinions, using appropriate support from the text
R5 select and use information for specific purposes.

Section B Composition (40 marks)

Candidates answer one question from a choice of four titles: two descriptive and two narrative.

Candidates use the title to develop and write a composition.

Candidates write about 350–450 words.

This question tests the following writing assessment objectives (40 marks):

W1 articulate experience and express what is thought, felt and imagined
W2 organise and structure ideas and opinions for deliberate effect
W3 use a range of vocabulary and sentence structures appropriate to context
W4 use register appropriate to context
W5 make accurate use of spelling, punctuation and grammar.

Component 3 Coursework Portfolio

Written assignments, 80 marks

This information should be read in conjunction with the relevant sections of the *Cambridge Handbook* for the relevant year of assessment.

The forms required for the conduct and assessment of the portfolio may be downloaded from **www.cambridgeinternational.org/samples**

Candidates submit a portfolio of three assignments, each of about 500–800 words. The assignments may be completed in any order, and are:

Assignment 1: writing to discuss, argue and/or persuade in response to a text or texts

Assignment 2: writing to describe

Assignment 3: writing to narrate.

The Coursework Portfolio tests the following writing assessment objectives (65 marks):

W1 articulate experience and express what is thought, felt and imagined
W2 organise and structure ideas and opinions for deliberate effect
W3 use a range of vocabulary and sentence structures appropriate to context
W4 use register appropriate to context
W5 make accurate use of spelling, punctuation and grammar.

For Assignment 1 only, the following reading assessment objectives are tested (15 marks):

R1 demonstrate understanding of explicit meanings
R2 demonstrate understanding of implicit meanings and attitudes
R3 analyse, evaluate and develop facts, ideas and opinions, using appropriate support from the text
R5 select and use information for specific purposes.

Work may be handwritten or word-processed.

Dictionaries may be used.

Candidates **must** include the first draft of one of the three assignments submitted. The first draft will not contribute to the final internally assessed mark or to the externally moderated mark for the portfolio.

The Coursework Portfolio **must** also include the text(s) used for Assignment 1.

Internal moderation

If more than one teacher in your centre is marking internal assessments, you must make arrangements to moderate or standardise your teachers' marking so that all candidates are assessed to a common standard. (If only one teacher is marking internal assessments, no internal moderation is necessary.) You can find further information on the process of internal moderation on the samples database at **www.cambridgeinternational.org/samples**

You should record the internally moderated marks for all candidates on the Coursework Assessment Summary Form and submit these marks to Cambridge International according to the instructions set out in the *Cambridge Handbook* for the relevant year of assessment.

External moderation

Cambridge International will externally moderate all internally assessed components.

- You must submit the marks of all candidates to Cambridge International.
- You must also submit the marked work of a sample of candidates to Cambridge International.

The sample you submit to Cambridge International should ideally include examples of the marking of each teacher. The samples database at **www.cambridgeinternational.org/samples** explains how the sample will be selected.

The samples database at **www.cambridgeinternational.org/samples** also provides details of how to submit the marks and work.

External moderators will produce a short report for each centre with feedback on your marking and administration of the assessment.

Additional information for Component 3 Coursework Portfolio

Please read this information in conjunction with the relevant sections of the *Cambridge Handbook* for the relevant year of assessment.

Assignments: general issues

- Assignments should arise from the programme of study undertaken by the teaching group.
- The best assignments are usually those that come from a shared learning experience but are finally chosen by individual candidates; negotiation of assignments with the teacher is recommended.
- All tasks set should be sufficiently challenging to stretch candidates to their full potential. For example, a class might study types of short story and their structures and conventions before individual candidates choose their own titles and write their own short stories for Assignment 3.
- Questions from past examination papers should not be used for coursework.
- Candidates are not expected to work under timed conditions.
- Assignments 1–3 may be completed in any sequence during the course. It is generally better that candidates complete more than three assignments during the course from which a suitable choice can eventually be made for the final portfolio.
- The assignments must clearly demonstrate different writing intentions and styles to the reader.

Assignment 1

- Assignment 1 is a piece of directed writing in response to a text or texts chosen by the teacher (or by the candidate, with the teacher's approval).
- This assignment is assessed for both writing and reading skills.
- Centres are advised to select text(s) of approximately two sides of A4 in total. Text(s) may consist of facts, opinions and/or arguments which can be selected, analysed and evaluated by the candidate and can be integrated into their own views.
- Note that literature texts are not usually suitable for this assignment.
- Text(s) may be of local, national or global interest – or all three – and should be suitable for the ability range of the candidates. They may be drawn from a variety of sources, e.g. newspapers, magazine articles, travel writing, text-based websites and media.
- Note that text(s) that are mainly informative or that provide content which has no development/discussion should not be set.
- Candidates should be able to give an overview of the argument as a whole and illustrate their understanding by commenting on specific ideas presented by the author of the text. This should include an explanation of any ideas of interest and an argument for or against them, as well as examining them for inconsistencies and substituting complementary or opposing views (e.g. recognise and comment on bias).
- The assignment may be written in any appropriate form, e.g. an article, a letter, or the words of a speech.
- A copy of all texts used for Assignment 1 must be included with the sample of portfolios sent to the external moderator.

Assignment 1 Discuss/argue and/or persuade in response to text(s)	Two examples: • **You are a local resident and feel very strongly about the ideas suggested in your local newspaper. Write a response to the editor in which you argue for or against the proposed ideas.** In your discussion you will need to evaluate the ideas and opinions presented in the text and centre your arguments around what is said. *Text:* a letter or article from a local newspaper arguing in favour of or against a controversial local issue. For example: plans to make changes to the local transport system, proposals to build a community building on public land or a plan to address the behaviour of young people in the area. *Note to teachers:* responses could be in any appropriate form, e.g. a letter or an article. • **You have read the transcript of a speech by a well-known person about an important topical issue. Write a response to that person in which you try to persuade them to change their minds about what they have said.** In your discussion you will need to evaluate the ideas and opinions presented in the speech and centre your arguments around what they have said. *Text:* a speech about a current topical, local or global issue. For example: a teacher's speech about space travel, a celebrity's speech about an environmental issue, or a doctor's speech about medicine. *Note to teachers:* responses could be in any appropriate form, e.g. a speech or a letter.

Assignment 2

- Assignment 2 is a piece of descriptive writing which is assessed for writing skills only.
- Candidates may submit poetry for Assignment 2, but this must be accompanied by some form of commentary by the candidate, e.g. about how the poem(s) came to be written. The commentary will be included in the word count.
- The candidate should develop ideas and images which create a convincing, well-defined picture, with varieties of focus.

Assignment 2 Writing to describe	Two examples: • **You are in a busy place waiting for a friend who is late. Describe your surroundings and your thoughts and feelings as you wait.** *Note to teachers:* a busy place can be any place which provides a definite sense of place/atmosphere and will contain a range of sights, sounds and/or characters for candidates to describe, e.g. cafes, train or bus stations, airport arrival or departure areas, sports stadiums, beaches and markets. • **Describe an important gathering or celebration.** *Note to teachers:* candidates should be encouraged to choose a celebration or gathering of which they have personal experience. Appropriate occasions could be any event which provides a definite sense of place/atmosphere and will contain a range of sights, sounds and/or characters for candidates to describe, e.g. weddings, significant anniversaries or birthdays.

Assignment 3

- Assignment 3 is a piece of narrative writing which is assessed for writing skills only.
- Candidates may write in any form.
- The candidate should ensure the plot is well defined and developed with features of fiction writing, such as description, characterisation and convincing details.

Assignment 3 Writing to narrate	Two examples: • **Write a narrative piece in which the following words appear '*and then they finally realised that it didn't really matter anymore*'.** *Note to teachers:* the words may appear in any part of the narrative writing. Candidates may write in a range of appropriate narrative forms, e.g. the opening or closing chapter of a novel or a short story. • **Write a fictional or autobiographical account of an important or life-changing event.** *Note to teachers:* candidates may write in a range of appropriate narrative forms and perspectives, e.g. a short story or several diary entries.

Marking of work should be positive, rewarding achievement where possible, but clearly differentiating across the whole range of marks, where appropriate.

The marker should look at the work and then make a judgement about which level statement is the best fit. In practice, work does not always match one level statement precisely so a judgement may need to be made between two or more level statements.

Once a best-fit level statement has been identified, use the following guidance to decide on a specific mark:

- If the candidate's work **convincingly** meets the level statement, award the highest mark.
- If the candidate's work **adequately** meets the level statement, award the most appropriate mark in the middle of the range (where middle marks are available).
- If the candidate's work **just** meets the level statement, award the lowest mark.

Table A: Level descriptions for writing in Assignment 1 (15 marks)

Level	Marks	Description
6	**13–15**	• Highly effective style capable of conveying subtle meaning. (W1) • Carefully structured for benefit of the reader. (W2) • Wide range of sophisticated vocabulary, precisely used. (W3) • Highly effective register for audience and purpose. (W4) • Spelling, punctuation and grammar almost always accurate. (W5)
5	**10–12**	• Effective style. (W1) • Secure overall structure, organised to help the reader. (W2) • Wide range of vocabulary, used with some precision. (W3) • Effective register for audience and purpose. (W4) • Spelling, punctuation and grammar mostly accurate, with occasional minor errors. (W5)
4	**7–9**	• Sometimes effective style. (W1) • Ideas generally well sequenced. (W2) • Range of vocabulary is adequate and sometimes effective. (W3) • Sometimes effective register for audience and purpose. (W4) • Spelling, punctuation and grammar generally accurate though with some errors. (W5)
3	**5–6**	• Inconsistent style, expression sometimes awkward but meaning clear. (W1) • Relies on the sequence of the original text. (W2) • Vocabulary is simple, limited in range or reliant on the original text. (W3) • Some awareness of an appropriate register for audience and purpose. (W4) • Frequent errors of spelling, punctuation and grammar, sometimes serious. (W5)
2	**3–4**	• Limited style. (W1) • Response is not well sequenced. (W2) • Limited vocabulary or words/phrases copied from the original text. (W3) • Limited awareness of appropriate register for audience and purpose. (W4) • Persistent errors of spelling, punctuation and grammar. (W5)
1	**1–2**	• Expression unclear. (W1) • Poor sequencing of ideas. (W2) • Very limited vocabulary or copying from the original text. (W3) • Very limited awareness of appropriate register for audience and purpose. (W4) • Persistent errors in spelling, punctuation and grammar impede communication. (W5)
0	**0**	• No creditable content.

Table B: Level descriptions for reading in Assignment 1 (15 marks)

Level	Marks	Description
6	**13–15**	• Successfully evaluates ideas and opinions, both explicit and implicit. (R1, R2, R3) • Assimilates ideas from the text to give a developed, sophisticated response. (R3, R5)
5	**10–12**	• Some successful evaluation of ideas and opinions, both explicit and implicit. (R1, R2, R3) • A thorough response, supported by a detailed selection of relevant ideas from the text. (R3, R5)
4	**7–9**	• Begins to evaluate mainly explicit ideas and opinions. (R1, R2, R3) • An appropriate response that includes relevant ideas from the text. (R3, R5)
3	**5–6**	• Selects and comments on explicit ideas and opinions. (R1, R2, R3) • Makes a general response including a few relevant ideas from the text. (R3, R5)
2	**3–4**	• Identifies explicit ideas and opinions. (R1, R2, R3) • Makes a limited response with little evidence from the text. (R3, R5)
1	**1–2**	• Very limited response with minimal relation to the text. (R1, R2, R3, R5)
0	**0**	• No creditable content.

Table C: Level descriptions for composition: content and structure in Assignments 2 and 3 (10 marks each)

Level	Marks	General and specific marking criteria	
		General	
6	**9–10**	• Content is complex, engaging and effective. (W1) • Structure is secure, well balanced and carefully managed for deliberate effect. (W2)	
		Specific – descriptive	**Specific – narrative**
		Many well-defined and developed ideas and images create a convincing overall picture with varieties of focus.	*The plot is well-defined and strongly developed with features of fiction writing such as description, characterisation and effective climax, and convincing details.*
		General	
5	**7–8**	• Content is developed, engaging and effective. (W1) • Structure is well managed, with some choices made for deliberate effect. (W2)	
		Specific – descriptive	**Specific – narrative**
		Frequent, well-chosen images and details give a mostly convincing picture.	*The plot is defined and developed with features of fiction writing such as description, characterisation, climax and details.*
		General	
4	**5–6**	• Content is relevant with some development. (W1) • Structure is competently managed. (W2)	
		Specific – descriptive	**Specific – narrative**
		A selection of relevant ideas, images and details, even where there is a tendency to write in a narrative style.	*The plot is relevant and cohesive, with some features such as characterisation and setting of scene.*
		General	
3	**3–4**	• Content is straightforward and briefly developed. (W1) • Structure is mostly organised but may not always be effective. (W2)	
		Specific – descriptive	**Specific – narrative**
		The task is addressed with a series of relevant but straightforward details, which may be more typical of a narrative.	*The plot is straightforward, with limited use of the features of narrative writing.*
		General	
2	**2**	• Content is simple, and ideas and events may be limited. (W1) • Structure is partially organised but limited in its effect. (W2)	
		Specific – descriptive	**Specific – narrative**
		The recording of some relevant events with limited detail.	*The plot is a simple narrative that may consist of events that are only partially linked and/or which are presented with partial clarity.*
		General	
1	**1**	• Content is occasionally relevant or clear. (W1) • Structure is limited and ineffective. (W2)	
		Specific – descriptive	**Specific – narrative**
		The description is unclear and lacks detail.	*The plot and/or narrative lacks coherence.*
0	**0**	No creditable content.	

Table D: Level descriptions for composition: style and accuracy in Assignments 2 and 3 (15 marks each)

Level	Marks	Description
6	**13–15**	• Precise, well-chosen vocabulary and varied sentence structures, chosen for effect. (W3) • Consistent well-chosen register suitable for the context. (W4) • Spelling, punctuation and grammar almost always accurate. (W5)
5	**10–12**	• Mostly precise vocabulary and a range of sentence structures mostly used for effect. (W3) • Mostly consistent appropriate register suitable for the context. (W4) • Spelling, punctuation and grammar mostly accurate, with occasional minor errors. (W5)
4	**7–9**	• Some precise vocabulary and a range of sentence structures sometimes used for effect. (W3) • Some appropriate register for the context. (W4) • Spelling, punctuation and grammar generally accurate, but with some errors. (W5)
3	**5–6**	• Simple vocabulary and a range of straightforward sentence structures. (W3) • Simple register with a general awareness of the context. (W4) • Frequent errors of spelling, punctuation and grammar, occasionally serious. (W5)
2	**3–4**	• Limited and/or imprecise vocabulary and sentence structures. (W3) • Limited and/or imprecise register for the context. (W4) • Persistent errors of spelling, punctuation and grammar. (W5)
1	**1–2**	• Frequently imprecise vocabulary and sentence structures. (W3) • Register demonstrates little or no sense of the context. (W4) • Persistent errors of spelling, punctuation and grammar impair communication. (W5)
0	**0**	• No creditable content.

Component 4 Speaking and Listening Test

Individual Talk and Conversation, approximately 10–12 minutes in total, 40 marks

This component is separately endorsed with grades of 1 (high) to 5 (low). Marks for Component 4 do **not** contribute to a candidate's overall grade.

Teachers must treat this component as a non-coursework speaking test and must read this information in conjunction with the relevant sections of the *Cambridge Handbook* for the relevant year of assessment.

There are two parts to the Speaking and Listening Test. In Part 1, candidates present an individual talk. In Part 2, candidates engage in a conversation with the teacher/examiner on their chosen topic.

There is no question paper for the test. The test must be taken within the Speaking and Listening Test window. You should record all candidates. Candidates must only take the Speaking and Listening Test **once** and both parts of the test **must** be recorded as one.

Part 1 Individual Talk (3–4 minutes) (20 marks)

The candidate talks for about 3–4 minutes on a single topic or theme which they have selected before the test. The candidate talks about a topic of particular interest, for example, about the candidate's reactions to meeting a famous person or about a recent film, which would include suggestions as to why others would also like it.

Candidates need to show that they are able to prepare and organise material, are aware of audience, and can select and employ a range of language devices. Candidates are encouraged to make presentations which are lively, by perhaps incorporating more creative presentational styles, such as taking up a 'voice' or presenting a dramatic monologue.

There is no question paper and each candidate chooses their own subject with guidance from their teacher. Teachers should advise on the suitability of topics or themes, but must **not** be involved in the preparation of material for the Individual Talk. The interaction is between the candidate and the teacher only, although the class may be present as an audience.

Candidates may bring one 'cue card' (about postcard size) into the examination room, to remind them of the main points they wish to make. The cue card should contain a list of key points, not continuous sentences. Candidates may write their points on one side of the cue card only. Candidates may also use a limited quantity of illustrative material, which may include maps, diagrams, statistics and pictures. Reading from, or reliance on, a script or extended notes is **not** allowed. Recitation of a memorised script is unlikely to be successful. The cue card and illustrative material must be retained by centres until six months after publication of results. The cue card and illustrative material must be labelled with the candidate's name and number.

The talk should be continuous. If absolutely necessary the teacher/examiner may prompt a candidate who is finding it difficult to continue within the advised time of 3–4 minutes. Teachers/examiners should interrupt to ask questions, and begin Part 2, if the candidate shows no sign of finishing after 4½ minutes.

Dictionaries may be used to prepare the Individual Talk, but they may **not** be taken into the test.

This part of the test is to be assessed using the level descriptions in Table A on page 25.

The Individual Talk tests the following speaking and listening assessment objectives (20 marks):

SL1 articulate experience and express what is thought, felt and imagined
SL2 present facts, ideas and opinions in a cohesive order which sustains the audience's interest
SL3 communicate clearly and purposefully using fluent language
SL4 use register appropriate to context.

Part 2 Conversation (7–8 minutes) (20 marks)

The Individual Talk leads into a conversation with the teacher/examiner about the candidate's chosen topic. For example, an account of meeting a famous person could be developed into a discussion of wider issues such as the nature and role of 'celebrity' and media intrusion; a talk about a film could be developed into discussion of wider issues such as censorship, popular culture and the film industry.

Candidates should be encouraged to consider how a conversation might develop around their chosen topic; if they cannot think of six questions they **could** be asked, the topic is unlikely to be easy to discuss.

During the Individual Talk, teachers/examiners are likely to make notes in order to help them ask appropriate questions.

Candidates must be prepared to supply additional factual material where appropriate and to express and defend a point of view. In order to give the candidate every opportunity, questions should be open, such as 'tell me more about...', 'why?' and 'how?', rather than closed questions which may be answered by 'yes/no'. Candidates should not be made to feel embarrassed about expressing viewpoints that are not those of the teacher/examiner. The teacher/examiner may wish to ask questions about those views, but these questions must not be judgemental.

The teacher/examiner should normally allow 7–8 minutes for each candidate. If a candidate 'dries up' after a few minutes, teachers/examiners should be ready to explore another aspect of the topic or theme; they should keep trying to make conversation so that the candidate is given every opportunity to demonstrate their ability. Questions should be rephrased (rather than repeated) in an attempt to continue the dialogue.

Teachers/examiners should beware of talking too much and of candidates being given credit for what the teacher/examiner has actually said. Candidates are responsible for showing that they can converse adequately; at the same time the teacher/examiner must make sure the candidate is given every opportunity to converse by following up any opening given.

Dictionaries may **not** be used in the test.

This part of the test is to be assessed using the level descriptions in Table B on pages 26 and 27.

The Conversation tests the following speaking and listening assessment objectives (20 marks):

SL1 articulate experience and express what is thought, felt and imagined
SL2 present facts, ideas and opinions in a cohesive order which sustains the audience's interest
SL3 communicate clearly and purposefully using fluent language
SL4 use register appropriate to context
SL5 listen and respond appropriately in conversation.

Marking instructions

The teacher must mark each candidate's test out of a total of 40, in line with the level descriptions. The total mark for the test is divided into 20 marks for Speaking in Part 1 (Individual Talk), and 10 marks for Speaking and 10 marks for Listening in Part 2 (Conversation).

For information, dates and methods of submission of the Speaking and Listening Test marks and sample, please refer to the *Cambridge Handbook* for the relevant year of assessment and the samples database at **www.cambridgeinternational.org/samples**

Marking: general principles

Marking of the Speaking and Listening Test should be positive, rewarding achievement where possible, but clearly differentiating across the whole range of marks, where appropriate.

The marker should look at the work and then make a judgement about which level statement is the best fit. In practice, work does not always match one level statement precisely so a judgement may need to be made between two or more level statements.

Once a best-fit level statement has been identified, use the following guidance to decide on a specific mark:

- If the candidate's work **convincingly** meets the level statement, award the highest mark.
- If the candidate's work **adequately** meets the level statement, award the most appropriate mark in the middle of the range (where middle marks are available).
- If the candidate's work **just** meets the level statement, award the lowest mark.

Table A: Level descriptions for Component 4, Part 1 – Individual Talk (20 marks)

Level	Marks	Description
5	**17–20**	• Full and well-organised use of content. • Lively delivery which fully engages the audience. • Employs a wide range of language devices (e.g. tone, irony, emphasis) accurately and sometimes eloquently. • Sustained, appropriate and accurate use of language throughout.
4	**13–16**	• Sound use of content. • Delivery may occasionally be stilted but often attempts to engage the audience. • Employs a good range of language devices (e.g. tone, irony, emphasis) soundly. • Mainly appropriate and accurate use of language.
3	**9–12**	• Adequate use of content. • Delivery is secure but at times unimaginative, with some attempt to engage the audience. • Language devices (e.g. tone, irony, emphasis) are used safely and appropriately. • Appropriate and accurate use of language demonstrated but some inaccuracy may be present.
2	**5–8**	• Content is thin or perhaps inconsistently used. • Delivery is not secure, with little attempt to engage the audience. • Limited employment of language devices (e.g. tone, irony, emphasis) with some inaccuracy. • Some appropriate use of language but with some inaccuracy.
1	**1–4**	• Content is mostly undeveloped and/or very thin. • Delivery is weak, with no attempt to engage the audience. • Not able to use language devices (e.g. tone, irony, emphasis) or devices used with serious error. • Language is not used appropriately, or is used with serious inaccuracy.
0	**0**	• Does not meet the above criteria.

Table B: Level descriptions for Component 4, Part 2 – Conversation (20 marks)

For Part 2, record separate marks for speaking and for listening.

Speaking			Listening		
Level	**Marks**	**Description**	**Level**	**Marks**	**Description**
5	**9–10**	• Extends the subject matter and elicits responses from the listener; speaks on equal terms with the listener. • Employs a wide range of language devices (e.g. tone, irony, emphasis) accurately and sometimes eloquently; sustained, appropriate and accurate use of language throughout.	**5**	**9–10**	• A natural and fluent conversation. • Responds fully to questions and develops prompts; deals confidently and sometimes enthusiastically with alterations in the direction of the conversation.
4	**7–8**	• Subject matter is organised and expressed competently; attempts to speak on equal terms with the listener but with a varying degree of success. • Employs a good range of language devices (e.g. tone, irony, emphasis) soundly; mainly appropriate and accurate use of language.	**4**	**7–8**	• The conversation is occasionally fluent and sometimes shaped by the candidate. • Consistently responds appropriately and in extended detail to questions and prompts; deals appropriately with most of the changes in the direction of the conversation.
3	**5–6**	• Deals with the subject matter adequately; the listener is generally but not always prominent. • Language devices (e.g. tone, irony, emphasis) are used appropriately; appropriate and accurate use of language demonstrated, but some inaccuracy may be present.	**3**	**5–6**	• The conversation is maintained through the candidate's responses. • Responds to questions adequately but deals less effectively with prompts; changes in the direction of the conversation are occasionally dealt with.
2	**3–4**	• There is evidence of some linking together of ideas relating to the subject matter but it is inconsistent; accepts that the listener is in full control of the conversation. • Limited use of language devices (e.g. tone, irony, emphasis) with some inaccuracy; some appropriate use of language but with some inaccuracy.	**2**	**3–4**	• The conversation is driven by the listener's questions. • The candidate provides limited response to the questions and struggles to develop prompts; tends to maintain the direction of the conversation.

Speaking			Listening		
Level	**Marks**	**Description**	**Level**	**Marks**	**Description**
1	**1–2**	• Simple facts and ideas are expressed with generally unsuccessful attempts at organisation; barely capable of engaging in a two-way conversation. • Not able to use language devices (e.g. tone, irony, emphasis) or devices used with serious error; language is not used appropriately or is used with serious inaccuracy.	**1**	**1–2**	• A two-way conversation is not successfully maintained. • The candidate responds simply or is unable to respond to questions or prompts; cannot recognise changes in the direction of the conversation.
0	**0**	• Does not meet the above criteria.	**0**	**0**	• Does not meet the above criteria.

Command words

Command words and their meanings help candidates know what is expected from them in the exams. The table below includes command words used in the assessment for this syllabus. The use of the command word will relate to the subject context.

Command word	What it means
Describe	state the points of a topic / give characteristics and main features
Explain	set out purposes or reasons / make the relationships between things evident / provide why and/or how and support with relevant evidence
Give	produce an answer from a given source or recall/memory
Identify	name/select/recognise

5 What else you need to know

This section is an overview of other information you need to know about this syllabus. It will help to share the administrative information with your exams officer so they know when you will need their support. Find more information about our administrative processes at **www.cambridgeinternational.org/eoguide**

Before you start

Previous study

We recommend that learners starting this course should have studied an English Language curriculum such as the Cambridge Lower Secondary programme or equivalent national educational framework.

Guided learning hours

We design Cambridge IGCSE syllabuses based on learners having about 130 guided learning hours for each subject during the course but this is for guidance only. The number of hours a learner needs to achieve the qualification may vary according to local practice and their previous experience of the subject.

Availability and timetables

All Cambridge schools are allocated to one of six administrative zones. Each zone has a specific timetable.

You can view the timetable for your administrative zone at **www.cambridgeinternational.org/timetables**

You can enter candidates in the June and November exam series. If your school is in India, you can also enter your candidates in the March exam series.

Check you are using the syllabus for the year the candidate is taking the exam.

Private candidates can enter for this syllabus. Some components are not available to private candidates. For more information, please refer to the *Cambridge Guide to Making Entries*.

Combining with other syllabuses

Candidates can take this syllabus alongside other Cambridge International syllabuses in a single exam series. The only exceptions are:

- Cambridge IGCSE English (as an Additional Language) (0472)
- Cambridge IGCSE (9–1) First Language English (0990)
- Cambridge IGCSE English as a Second Language (0510)
- Cambridge IGCSE (9–1) English as a Second Language (0993)
- Cambridge IGCSE English as a Second Language (count-in oral) (0511)
- Cambridge IGCSE (9–1) English as a Second Language (count-in oral) (0991)
- Cambridge O Level English Language (1123)
- syllabuses with the same title at the same level.

Cambridge IGCSE, Cambridge IGCSE (9–1) and Cambridge O Level syllabuses are at the same level.

Group awards: Cambridge ICE

Cambridge ICE (International Certificate of Education) is a group award for Cambridge IGCSE. It allows schools to offer a broad and balanced curriculum by recognising the achievements of learners who pass exams in a range of different subjects.

Learn more about Cambridge ICE at **www.cambridgeinternational.org/cambridgeice**

Making entries

Exams officers are responsible for submitting entries to Cambridge International. We encourage them to work closely with you to make sure they enter the right number of candidates for the right combination of syllabus components. Entry option codes and instructions for submitting entries are in the *Cambridge Guide to Making Entries*. Your exams officer has a copy of this guide.

Exam administration

To keep our exams secure, we produce question papers for different areas of the world, known as administrative zones. We allocate all Cambridge schools to one administrative zone determined by their location. Each zone has a specific timetable. Some of our syllabuses offer candidates different assessment options. An entry option code is used to identify the components the candidate will take relevant to the administrative zone and the available assessment options.

Support for exams officers

We know how important exams officers are to the successful running of exams. We provide them with the support they need to make your entries on time. Your exams officer will find this support, and guidance for all other phases of the Cambridge Exams Cycle, at **www.cambridgeinternational.org/eoguide**

Retakes and carry forward marks

Candidates can retake the whole qualification as many times as they want to. Information on retake entries is at **www.cambridgeinternational.org/entries**

Candidates cannot resubmit, in whole or in part, coursework [or speaking tests] from a previous series. To confirm what entry options are available to carry forward marks for this syllabus, refer to the *Cambridge Guide to Making Entries* for the relevant series. Regulations for carrying forward internally assessed marks can be found in the *Cambridge Handbook* for the relevant year at **www.cambridgeinternational.org/eoguide**

Language

This syllabus and the related assessment materials are available in English only.

Accessibility and equality

Syllabus and assessment design

Cambridge International works to avoid direct or indirect discrimination in our syllabuses and assessment materials. We aim to maximise inclusivity for candidates of all national, cultural or social backgrounds and with other protected characteristics. In addition, the language and layout used are designed to make our materials as accessible as possible. This gives all learners the opportunity, as fairly as possible, to demonstrate their knowledge, skills and understanding and helps to minimise the requirement to make reasonable adjustments during the assessment process.

Access arrangements

Access arrangements (including modified papers) are the principal way in which Cambridge International complies with our duty, as guided by the UK Equality Act (2010), to make 'reasonable adjustments' for candidates with special educational needs (SEN), disability, illness or injury. Where a candidate would otherwise be at a substantial disadvantage in comparison to a candidate with no SEN, disability, illness or injury, we may be able to agree pre-examination access arrangements. These arrangements help a candidate by minimising accessibility barriers and maximising their opportunity to demonstrate their knowledge, skills and understanding in an assessment.

Important:

- Requested access arrangements should be based on evidence of the candidate's barrier to assessment and should also reflect their normal way of working at school; this is in line with *The Cambridge Handbook* **www.cambridgeinternational.org/eoguide**
- For Cambridge International to approve an access arrangement, we will need to agree that it constitutes a reasonable adjustment, involves reasonable cost and timeframe and does not affect the security and integrity of the assessment.
- Availability of access arrangements should be checked by centres at the start of the course. Details of our standard access arrangements and modified question papers are available in *The Cambridge Handbook* **www.cambridgeinternational.org/eoguide**
- Please contact us at the start of the course to find out if we are able to approve an arrangement that is not included in the list of standard access arrangements.
- Candidates who cannot access parts of the assessment may be able to receive an award based on the parts they have completed.

Some access arrangements are not allowed in this syllabus because they affect the assessment objective:

- candidates are **not** allowed to use voice-activated software to dictate their written work
- human readers are **not** allowed.

If your candidate(s) will have significant difficulties accessing the components of this qualification, please contact **info@cambridgeinternational.org** before starting the course.

After the exam

Grading and reporting

Grades A*, A, B, C, D, E, F or G indicate the standard a candidate achieved at Cambridge IGCSE.

A* is the highest and G is the lowest. 'Ungraded' means that the candidate's performance did not meet the standard required for grade G. 'Ungraded' is reported on the statement of results but not on the certificate.

In specific circumstances your candidates may see one of the following letters on their statement of results:

- Q (PENDING)
- X (NO RESULT).

These letters do not appear on the certificate.

On the statement of results and certificates, Cambridge IGCSE is shown as INTERNATIONAL GENERAL CERTIFICATE OF SECONDARY EDUCATION (IGCSE).

How students and teachers can use the grades

Assessment at Cambridge IGCSE has two purposes:

- to measure learning and achievement

  The assessment:

  – confirms achievement and performance in relation to the knowledge, understanding and skills specified in the syllabus, to the levels described in the grade descriptions.
- to show likely future success

  The outcomes:

  – help predict which students are well prepared for a particular course or career and/or which students are more likely to be successful

  – help students choose the most suitable course or career.

Grade descriptions

Grade descriptions are provided to give an indication of the standards of achievement candidates awarded particular grades are likely to show. Weakness in one aspect of the examination may be balanced by a better performance in some other aspect.

Grade descriptions for Cambridge IGCSE First Language Engish will be published after the first assessment of the syllabus in 2020. Find more information at **www.cambridgeinternational.org/igcse**

Changes to this syllabus for 2024, 2025 and 2026

The syllabus has been updated. This is version 1, published September 2021.

You must read the whole syllabus before planning your teaching programme.

Changes to assessment (including changes to specimen papers)	Paper 1 Reading: • The assessment of W5: Make accurate use of spelling, punctuation and grammar, has been removed from Paper 1 Reading only. • W5 has been removed from Question 1f and Question 3.

Any textbooks endorsed to support the syllabus for examination from 2020 are still suitable for use with this syllabus.

School feedback: ‘While studying Cambridge IGCSE and Cambridge International A Levels, students broaden their horizons through a global perspective and develop a lasting passion for learning.’

Feedback from: Zhai Xiaoning, Deputy Principal, The High School Affiliated to Renmin University of China

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Cambridge Assessment International Education

Cambridge IGCSE®

FIRST LANGUAGE ENGLISH **0500/01**

Paper 1 Reading **For examination from 2020**

SPECIMEN INSERT **2 hours**

0123456789

INFORMATION

- This insert contains the reading texts.
- You may annotate this insert and use the blank spaces for planning. **Do not write your answers** on the insert.

This document has **6** pages. Blank pages are indicated.

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Read **Text A**, and then answer **Questions 1(a)–1(e)** on the question paper.

Text A: Project Mammoth

This text is an article about a new scientific project.

Of all the incredible possibilities presented by controversial new scientific techniques, perhaps the most intriguing are efforts to bring animals back from extinction. Candidates for 'de-extinction', as the process is known, include species like the passenger pigeon (the last one died in captivity in 1914) and the dodo (last seen in 1662).

These projects are not just distant dreams.

Scientists working on such projects estimate that a variation of the first new woolly mammoth (which disappeared some 4 000 years ago) may soon be born. They hope these animals will play a role in slowing or reversing the effects of climate change.

The basic idea behind how it would work is that scientists would first retrieve DNA from the remains of a woolly mammoth that had been preserved for centuries in the frozen tundra[1] and use that to alter the DNA of modern Asian elephants. According to scientists, the two species are so closely related that if mammoths were alive today they could successfully breed with elephants. Tweaking the Asian elephants' DNA to more closely resemble that of their ancient relatives could mean elephants might be able to give birth to a furrier, fattier hybrid.

Scientists say this work is decidedly not about creating Mammoth Park – the creature would not be a perfect copy of a mammoth anyway. The hope is that these mammoth-like Asian elephants will be more resistant to cold and will repopulate the tundra and coniferous forest in Eurasia and North America. Scientists feel that this will help to protect endangered Asian elephants and revive an ancient grassland in the tundra, which could prevent the melting of Siberia's permafrost.

The project is not without its critics who claim the idea is no more than a gimmick, seducing scientists into thinking they are saving the world and distracting us from guaranteeing our planet's biodiversity for future generations with promises of being able to fix mistakes later.

Scientists defending the idea explain, 'We're just bringing DNA back from the past to improve modern survival and diversity. The Asian elephant faces threats to its existence – it's going extinct, just like the mammoth did, and mainly because of humans. Bits of mammoth DNA can give them a better chance of survival.'

[1] **tundra**: a vast treeless plain in the Arctic where the subsoil is permanently frozen

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Read **Text B**, and then answer **Question 1(f)** on the question paper.

Text B: Waking the Baby Mammoth

This text is a review of a television programme called 'Waking the Baby Mammoth'.

Only a handful have been found before. But none like her. Her name is Lyuba. A one-month-old baby mammoth, she walked the tundra about 40 000 years ago, then died mysteriously. Discovered on a riverbank in Siberia, she's the most perfectly preserved woolly mammoth ever discovered. Lyuba has mesmerised the scientific world with her arrival – creating headlines across the globe.

'Waking the Baby Mammoth', a new television programme, tells the tale of this single accidental discovery of a frozen baby mammoth in the Siberian tundra and how the discovery has enriched our understanding of these extinct magnificent beasts.

The programme begins with the incredibly fortunate discovery of Lyuba by a reindeer herder who feared that disturbing the remains of the dead might lead to a curse. Too often with such findings, the preserved creature would be dug up and sold, leading to irreversible decomposition and the loss of a treasure trove of valuable information. However, the herder had enough foresight to contact authorities, and scientists began the careful retrieval process. Everyone wanted to know how Lyuba had died. What could she tell us about life during the Ice Age and the Earth's changing climate?

The programme follows the scientific process and the hurdles in understanding where Lyuba came from and what she can tell us about her Pleistocene[1] life. That being said, apart from specific experiments involving high-tech bone scans, tissue extraction and dental examinations, the programme does not delve too far into the intricate data. We are left wondering whether scientists will be able to extract her DNA, and what secrets that might uncover. It's impossible to watch the work on Lyuba without sharing the anxiety the scientists must have felt to get it right.

The programme succeeds brilliantly in bringing drama to a quite amazing story. We are presented with stunning 3D animations of Lyuba and her mother. In cinematic form, Lyuba is brought to life as an active furry baby mammoth, bouncing along next to scientists as they contemplate the frozen carcass's secrets. The visuals are beautiful – light shines off the baby's fur and her shadows dance in just the right way to really make her come alive.

The programme has truly woken the baby mammoth within our minds and hearts.

[1] **Pleistocene**: the Ice Age, which lasted over 2.5 million years and ended about 12 000 years ago

Read **Text C**, and then answer **Questions 2(a)–(d)** and **Question 3** on the question paper.

Text C: The Gift

This text is taken from a longer narrative. At this point in the story, it is the night of Natalia's sixteenth birthday. Her grandfather, a doctor, has arrived back late at night from visiting patients. He has woken Natalia and asked her to follow him quietly through the streets of their city.

We were nearing the end of our side street and I assumed the silence of our walk would be shattered by the bustle along the tramway. But when we got there, nothing, not even a single passing car. Every window was dark. The hazy moon seemed to gather the silence up around it like a net. Not a sound: no sirens, no rats in the bins that lined the street. My grandfather stopped, looked up and down the street, then turned left.

'It's not far now,' he said.

I caught up with him long enough to see that he was smiling. 'Not far to where?' I said, out of breath, angry. I drew myself up and stopped. 'I'm not going any further until you tell me.'

He turned to look at me, indignant. 'Lower your voice you fool,' he hissed. Suddenly his arms went over his head in a wide arc. 'Can't you feel it? No one in the world awake but us.' And off he went again.

We passed empty windows of shops that had gone out of business; lightless buildings; a beggar sleeping so soundly that I would have thought him dead if I hadn't realised that the moment had closed around us, making everything still.

Suddenly grandfather stopped ahead of me and stood, pointing into the distance, his hand shaking with excitement.

'There,' he said. 'Look!'

I peered out into the street. On the other side, there was a street lamp with a dying bulb. I was opening my mouth to say 'What?' and then I saw it. Half a block from us, an enormous shadow was moving along the street.

At first I thought it was a tram, but its shape was too organic, too lumpy, and it was going far too slowly for that, making almost no noise. It was swaying, swaying up the street with an even momentum in a rolling motion that was drawing it away from us like a tide, and every time it rocked forward, something about it made a soft dragging sound on the rails. As we watched, the thing sucked in air and then let out a deep groan.

'That's an elephant!' I said.

My grandfather said nothing. His glasses had fogged up during the walk, but he wasn't taking them off to wipe them. He took my hand; we watched the animal.

Its ears were folded back against the domed, bouldered head with big-lidded eyes; the arched roll of the spine fell away into the hips; dry folds of skin shook around the shoulders and knees as it shifted its weight. It seemed to take up the whole street. It dragged its curled trunk like a fist along the ground.

Several metres in front of it, holding a bag of something that must have been enormously tempting, a short young man was walking slowly backward, drawing it forward with whispers.

'I saw them at the train station as I was coming home,' my grandfather said.

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The elephant passed: slow, graceful, enchanted by the food in the young man's hand.

'No one will ever believe this,' I said.

My grandfather looked at me like he'd never seen me before. 'You must be joking,' he said.

'Look around. Think for a moment – do you think anybody would understand? Do you think it will matter to them?'

Later that year, we would read about how some soldiers had found an elephant near death at the site of an abandoned circus; about how, despite everything, despite closure and bankruptcy, the zoo director had said, 'Bring him in – eventually the kids will see him.' The newspapers ran a picture of him, standing stark-ribbed in his new pen at the zoo, an advert of better times to come, hope for the future and the end of the war.

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Copyright Acknowledgements:

Question 1a–e	© Lila Shapiro; *We May Resurrect The Mammoth Sooner Than You Think*; Huffington Post; 18 December 2015.
Question 1f	© *Waking The Baby Mammoth*; National Geographic; 12 April 2009. © *Biochemical Soul*; http://biochemicalsoul.com/tag/waking-the-baby-mammoth/
Questions 2 & 3	© Téa Obreht; *The Tigers Wife*; Weidenfeld & Nicolson; 2011.

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Cambridge IGCSE™
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For examination from 2024



Cambridge Pathway

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Changes to this syllabus for 2024

Paper 1 Reading

The assessment of *W5: Make accurate use of spelling, punctuation and grammar* has been removed from Paper 1 Reading.

The W5 assessment objective has been removed from the following questions and marking criteria: Question 1f and Question 3

W5 will continue to be assessed in extended responses in the Writing Paper.

Section 1: About this guide

This learner guide explains what you need to know about your Cambridge IGCSE First Language English course.

It will help you to understand:

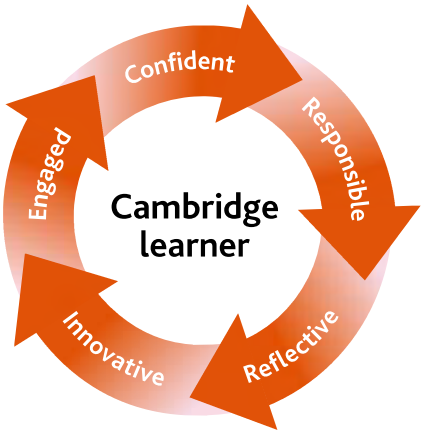
- ✓ the skills you should develop by taking this Cambridge IGCSE course
- ✓ how you will be assessed
- ✓ what examiners are looking for in the answers you write
- ✓ how you can revise effectively, using our revision tips and interactive revision checklist (Section 6).

You can use this guide to help you during your Cambridge IGCSE First Language English course, but remember that it is important to **read widely** – both for your own enjoyment and to increase your awareness of the different ways in which English can be used. Try to read different types of text, such as short stories, novels, newspaper reports, magazine articles, travel writing, autobiographies and biographies.

Reading a wide range of texts will help to inform and inspire your writing, and help to increase your understanding of **how to write for different purposes and audiences**.

Alongside your skills in reading and writing, you also need to develop your speaking and listening skills, e.g. by engaging in conversations.

Cambridge IGCSE qualifications are accepted and valued by leading universities and employers around the world as evidence of academic achievement. Following the Cambridge IGCSE First Language English course will help you to understand the subject and develop the skills you need for your next step in education or employment. This guide provides ideas and information to help you make the most of the opportunities your Cambridge IGCSE course offers to become an appreciative and critical reader, writer, speaker and listener of English.



Section 2: Syllabus content – skills and understanding

During your Cambridge IGCSE First Language English course you will need to:

- develop your ability to communicate clearly, accurately and effectively when speaking and writing
- learn how to use a wide range of vocabulary, and the correct grammar, spelling and punctuation
- develop your personal style of writing and speaking, as well as your awareness of the audience you are addressing.

You can think of your Cambridge IGCSE First Language English course as having three main areas of skills and understanding:

- Reading
- Writing
- Speaking and listening.

Here is an outline of the skills you should aim to have developed by the end of your course.

Reading

You need to be able to:

R1 demonstrate understanding of explicit meanings

R2 demonstrate understanding of implicit meanings and attitudes

R3 analyse, evaluate and develop facts, ideas and opinions, using appropriate support from the text

R4 demonstrate understanding of how writers achieve effects and influence readers

R5 select and use information for specific purposes.

Writing

You need to be able to:

W1 articulate experience and express what is thought, felt and imagined

W2 organise and structure ideas and opinions for deliberate effect

W3 use a range of vocabulary and sentence structures appropriate to context

W4 use register appropriate to context

W5 make accurate use of spelling, punctuation and grammar.

Speaking and listening

You need to be able to:

SL1 articulate experience and express what is thought, felt and imagined

SL2 present facts, ideas and opinions in a cohesive order which sustains the audience's interest

SL3 communicate clearly and purposefully using fluent language

SL4 use register appropriate to context

SL5 listen and respond appropriately in conversation.

These skills are sometimes called **assessment objectives** as they are the skills you will want to show you have when they are tested at the end of your course.

Section 3: How you will be assessed

There are four components available in the Cambridge IGCSE First Language English course. You will take either two or three components in total. Find out from your teacher which components you will be taking, and when you will be taking them.

At the end of your course, your reading and writing skills will be assessed for your final grade for Cambridge IGCSE First Language English. There are two different options for how this can happen.

Option one

You will take **two examinations.**

Paper 1
Reading

AND

Paper 2
Directed Writing and Composition

OR

Option two

You will take **one examination** and submit a **coursework portfolio** of written assignments completed during your course.

Paper 1
Reading

AND

Component 3
Coursework Portfolio

The same reading and writing skills will be tested in both options, and you will be able to access the full range of grades for the Cambridge IGCSE qualification.

There is also an extra option for assessing your speaking and listening skills:

Component 4
Speaking and Listening Test

Marks for speaking and listening do not contribute to the overall grade you receive for the reading and writing components. Instead, where you perform to an appropriate standard, your Cambridge IGCSE certificate will also record an additional speaking and listening grade.

Components at a glance

The table below gives you further information about each of the components.

Component	Time and marks	Skills assessed	Details	Percentage of qualification
Paper 1 Reading Passages (compulsory)	2 hour examination 80 marks	Reading (65 marks) Writing (15 marks)	Read three texts in the examination and answer **three questions**.	50%
Paper 2 Directed Writing and Composition (alternative to Component 3)	2 hour examination 80 marks	Writing (65 marks) Reading (15 marks)	Read one or two texts in the examination and answer **two questions**.	50%
Component 3 Coursework Portfolio (alternative to Paper 2)	Completed during your course 80 marks	Writing (65 marks) Reading (15 marks)	Complete **three written assignments**. One of these is a response to one or two texts.	50%
Component 4 Speaking and Listening Test (optional)	Additional test 10–12 minutes total 40 marks Completed before your written examination(s)	Speaking (30 marks) Listening (10 marks)	You will talk for about 3–4 minutes on a single topic or theme. This **individual talk** leads into a **conversation** about your chosen topic or theme.	Separately endorsed

Remember:

- you **must** take Paper 1
- you take **either** Paper 2 **or** Component 3
- Component 4 does **not** contribute to your overall result, and is marked as a separate examination, for which you will be given a separate result.

About each component

Below are further details about each component.

Paper 1	Marks	Questions
Reading 2 hour examination You will answer three compulsory questions on three texts (A, B, C). The texts will be printed on the question paper insert and may be on a similar topic. You should spend about **15 minutes reading the texts**, leaving approximately 30–35 minutes to respond to each question.	30	**Question 1** is based on Text A and Text B (The total length of Text A and B combined will be 700–750 words) This question is divided into separate parts: • **Comprehension task (based on Text A)** You respond to a series of sub-questions. These sub-questions test your understanding of both explicit and implicit meanings and your ability to select/use information from the text. *15 marks are available for reading* • **Summary task (based on Text B)** You answer a selective summary task using your own words. Your summary must be written as continuous writing of no more than 120 words. *10 marks are available for reading, 5 marks for writing*
	25	**Question 2** is based on Text C (500–650 words). This question is divided into two separate parts: • **Short-answer questions** You respond to a series of sub-questions which require answers of different lengths. These sub-questions test your understanding of the meaning of words and phrases used in Text C, as well as the effect they have on the reader. *10 marks are available for reading* • **Language task** You write 200–300 words in response to a question focused on certain paragraphs in Text C. You must select three relevant examples of interesting use of language from each of the paragraphs specified and analyse these examples to show how the writer uses language to convey meaning and to create effect. *15 marks are available for reading*
	25	**Question 3** is based on Text C (500–650 words). • **Extended response to reading** You should write 250–350 words in response to the task in which you modify, use and develop ideas and details from Text C. You will be asked to respond using your own words in one of the following text types: letter, report, journal, speech, interview and article. *15 marks are available for reading, 10 marks for writing*

Paper 2	Marks	Questions
Directed Writing and Composition 2 hour examination You will answer two questions: Question 1 and Question 2, 3, 4, or 5. Question 1 is compulsory and text-based. The text(s) will be printed on the question paper insert.	40	**Section A Directed Writing** is based on one or two texts totalling 650–750 words. You should write 250–350 words in response to the task in Question 1, using, evaluating and developing the information in the text(s). You will be asked to create a discursive/argumentative/persuasive response using your own words in one of the following text types: a speech, letter or article. *25 marks are available for writing and 15 marks for reading*
	40	**Section B Composition** offers a choice of four questions: two descriptive (Questions 2 and 3) and two narratives (Questions 4 and 5). You choose one question title (Question 2, 3, 4 or 5) and use the title to develop and write a composition. You should write 350–450 words. *40 marks are available for writing*

Component 3	Marks	Questions
Component 3 Coursework portfolio You will submit three assignments that you have completed during your course of study. The three assignments will need to demonstrate different writing intentions and styles to the reader. Assignments may be completed in any sequence during the course.	30	**Assignment 1: Writing to discuss, argue and/or persuade** You will be asked to respond to a text or texts in your own words, e.g. to create an article, a letter, or the words of a speech. *15 marks are available for writing and 15 marks for reading*
	25	**Assignment 2: Writing to describe** You will be asked to create a piece of descriptive writing (or poem(s) with a commentary). You will need to develop ideas and images which create a convincing, well-defined picture, with varieties of focus. *25 marks are available for writing*
	25	**Assignment 3: Writing to narrate** You will be asked to create a piece of narrative writing. You will need to ensure the plot is well defined and developed with features of fiction writing, such as description, characterisation and convincing details. *25 marks are available for writing*

Component 4	Time	Questions
Component 4 (optional) Speaking and Listening Test There are two parts to the test. There is no question paper. You will choose your own subject with guidance from your teacher. You are not allowed to read from, or rely on, a script or extended notes.	3–4 mins	**Part 1: Individual Talk** You will talk for about 3–4 minutes on a single topic of particular interest. You will also need to show that you are able to prepare and organise material, are aware of audience, and can select and employ a range of language devices to make a lively presentation.
	7–8 mins	**Part 2: Conversation** You will take part in a conversation with the teacher/examiner about your chosen topic.

Section 4: What skills will be assessed

In section 2 of this learner guide, you saw that the areas of knowledge, understanding and skills that you will be assessed on are called assessment objectives (AO) and that there are three sets of assessment objectives for English:

- Reading
- Writing
- Speaking and listening

Assessment objectives(AO)	What does the AO mean?	What do you need to be able to do?
AO1 Reading (50% of your final mark)	This is the part of the course where your ability to read and respond in different ways to different types of text is assessed. .	• Show that you understand the explicit (more obvious) meanings communicated in a particular text • Show that you can recognise hints and suggestions in a text to understand the implicit (more subtle) meanings and attitudes • Evaluate and analyse the facts, ideas and opinions you read by using, explaining and developing them (and referring to supporting evidence from the text where it is appropriate) • Show that you understand how a writer has influenced their reader through their use of language • Select and use relevant information from a text to answer different questions
AO2 Writing (50% of your final mark)	This is the part of the course where your ability to write accurately and effectively, using Standard English appropriately is assessed.	• Write convincingly to convey real and imagined experience, thoughts and feelings • Sequence and connect the ideas and opinions effectively within your written response to interest and influence your reader • Use a range of appropriate vocabulary and sentence structures within each written response • Vary your writing to suit the purpose, audience and form of the task • Write accurately, avoiding errors of spelling, punctuation and grammar
AO3 Speaking and listening (This is optional and reported separately. It is not part of your final mark.)	During your course, you will be developing your use of spoken English in a range of situations. If you choose Component 4 Speaking and Listening Test, this is the part of the course where your presentation skills, your ability to participate in engaging conversations and to respond spontaneously to questions and prompts will be assessed.	• Speak about appropriate thoughts and feelings that relate to the topic of your talk • When you present your talk, ensure the order of your ideas are logical to make it easy to understand • Use a range of appropriate key features to communicate ideas in a way that satisfies the purpose and audience of your task • Communicate an appropriate and effective voice that matches the purpose and audience of the different types of talks you present • Listen to what others say during a conversation and respond with appropriate, relevant and thoughtful ideas of your own

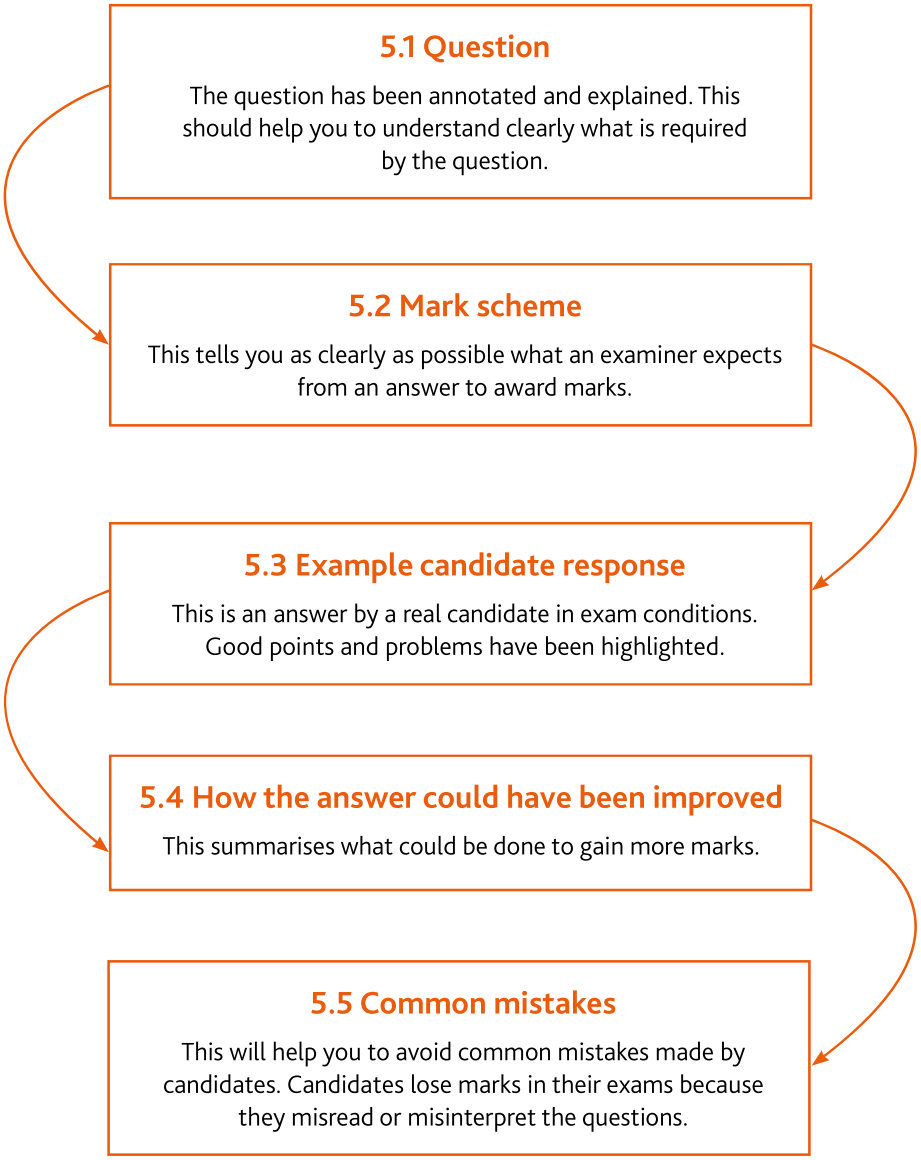
Section 5: Example candidate response

This section takes you through an example question and response from a Cambridge IGCSE First Language English specimen paper. It will help you to understand what is required in a particular response.

Remember, the information and advice in this section is specific to the example question and response being demonstrated. It will help you to understand how your responses might be viewed by an examiner, but it is not a list of what to do in all questions.

In your own examination, you will need to pay careful attention to what each question is asking you to do and consider the evidence of skills and understanding you need to demonstrate for that particular task.

This section is separated as follows:



5.1 Question

This is an example of a **Paper 1 Question 3** task – an extended response to the text.

Once you have read through the question instructions, you will need to **re-read** the text to identify ideas and details you can adapt to use in your answer.

The **purpose** of the response is to explain the grandfather's point of view as he remembers the events described in Text C.

Re-read Text C, *The Gift*, in the insert and then answer Question 3 on this question paper.

Question 3

You are the grandfather. Some years later you are interviewed about your memories of that night for a radio programme about local history.

The interviewer asks you the following three questions only:

- What did you see and feel during your journeys through the city that night?
- What do you remember of your granddaughter's behaviour and reactions that night?
- What were your reasons for taking your granddaughter out that night and what do you think she gained from the experience?

Write the words of the interview.

Base your interview on what you have read in Text C, but be careful to use your own words. Address each of the three bullet points.

Begin your interview with the first question.

Write about 250 to 350 words.

Up to 15 marks are available for the content of your answer and up to 10 marks for the quality of your writing.

The **audience** for the response includes both the interviewer and listeners to the radio programme who are interested in what happened at the time of the story.

You will need to include both explicit (obvious) and implicit (more subtle) ideas in your response – making sure you cover ideas for all three questions the interviewer has asked will help you to do this.

The response to this question needs to be in the **form** of an interview. Remember in your examination to check which form (or text-type) you need to use to answer the task.

The number of words suggested is for guidance: write **about** 250–350 words. Paying attention to the guidance for word limits will help you to plan your time in the examination and target the requirements of each question more effectively.

You will need to use ideas from Text C to show evidence of close reading, but be careful not to copy phrases or longer sections from the text as doing so suggests that you have not fully understood what you have read.

Text C: The Gift is taken from a longer narrative, *The Tigers Wife* by Téa Obreht. Your teacher will be able to find a full copy of the 2020 Specimen Paper 1 Insert on our School Support Hub www.cambridgeinternational.org/support

Here is an extract of Text C:

"We were nearing the end of our side street and I assumed the silence of our walk would be shattered by the bustle along the tramway. …'The newspapers ran a picture of him, standing stark-ribbed in his new pen at the zoo, an advert of better times to come, hope for the future and the end of the war."

At this point in the story, it is the night of Natalia's sixteenth birthday. Her grandfather, a doctor, has arrived back late at night from visiting patients. He has woken Natalia and asked her to follow him quietly through the streets of their city.

5.2 Marking Criteria for Question 3 (Level 5)

The marking criteria below lists the evidence of reading skills and understanding the examiner will be looking for in your answer. Level 5 includes a possible mark of 13–15 out of 15 marks available for reading in this question.

READING Level 5 description	READING Explanation
The response reveals a thorough evaluation and analysis of the text.	You have considered, adapted and used ideas from the text carefully and shown your understanding by presenting them from a different perspective to that of the original.
Developed ideas are sustained and well related to the text.	You have paid attention to details, hints and suggestions in the text to extend ideas in your response, e.g. to suggest what different characters might be thinking based on the evidence you have.
A wide range of ideas is applied	You have selected and used relevant ideas from the whole text and shown that you understand both explicit (obvious) ideas and implicit (more subtle) ideas and attitudes.
There is supporting detail throughout, which is well integrated into the response, contributing to a strong sense of purpose and approach.	You have identified a good number of important details in the text which your audience would need to know and/or which help to back up your purpose for writing. You include these details by dropping them in where relevant as you write your response.
All three bullets are well covered.	You have paid equal attention to all three bullet points in the question and included a number of relevant ideas for each bullet.
A consistent and convincing voice is used.	You have shown that you understand attitudes and perspectives in the text by using your own words to create a suitable voice for your response.

The marking criteria below lists the evidence of writing skills including structure and order and style of language, that the examiner will be looking for in your answer. Level 5 includes a possible mark of 9–10 out of 10 marks available for writing in this question.

WRITING Level 5 description	WRITING Explanation
Effective register for audience and purpose.	Just as we speak differently to different people, we write English differently in different circumstances. For example, we might alter the tone we use and/or be more formal in how we write depending on who is going to read what we write (the audience) and why we are writing (the purpose). You will need to use a level and style of writing to suit the audience and purpose for the task as set.
The language of the response sounds convincing and consistently appropriate.	You will need to maintain a suitable style, voice and tone for the whole of your response in order to show your expertise in using language in that particular context. You can think of this as like playing a role – your whole response should be convincing and sound like the real thing.
Ideas are firmly expressed in a wide range of effective and/ or interesting language.	Avoid repeating vocabulary from the text, or over-using certain words and expressions. You should try to use a wide range of vocabulary, selecting the appropriate words to express your meaning precisely and help communicate your ideas exactly to your reader.
Structure and sequence are sound throughout.	Make sure that your reader can follow your writing. Plan, organise and link ideas clearly and helpfully. Avoid repeating the same points, listing ideas or simply replaying information in the order of the passage.

5.3 Example candidate response and examiner comments

(1) "Hello, thanks for having me on this programme today."

"No problem we are welcome to have you. Regarding your memories of that particular night, what did you see and feel during you journeys through the city that night?"

(2) "Well, I took my granddaughter out for her 16th birthday. We walked to the end of our side street and entered into complete silence. (3) There were no cars and no windows alight (4) at all. I felt like time had stopped, everything was so silent. Smiling to myself, I turned left and kept walking until my granddaughter stopped me. I told her to be quiet (5), then we carried on, passing empty shops, lightless buildings and a beggar sleeping like a rock. (6) Then we reached it. Ecstatic (7), I told my granddaughter to look across the street, the one with the broken street light. And there it was, that majestic creature, walking slowly along the street.

1	The candidate does not waste time with a long introduction, and remembers to adapt their style to suit that of a radio interview.
2	This information would be better used in answering the third question as it explains one reason for taking his granddaughter out that evening.
3	The candidate includes a number of relevant ideas in answer to the interviewer's first question: it was silent, it was dark and there was no one around.
4	'Alight' is not the correct use of the word – alight means being on fire not being illuminated or lit up. More precise use of vocabulary is needed.
5	This idea answers the second question as it concerns Natalia's behaviour – suggesting she was too loud and needed to be quiet.
6	Supporting details make the response more convincing. Empty shops, lightless buildings, a sleeping beggar are explicit details of what grandfather saw (mentioned by Natalia). To show higher level reading skills, the candidate could develop these ideas by suggesting how grandfather felt about what he saw, based on the details in the text, e.g. we can infer that he felt sadness and regret at seeing the city like this.
7	The candidate picks up on details in the text to work out grandfather's feelings at this point.

Amazed by this creature, I could only stand and watch in awe. It slowly swayed up and down the street, full of lethargy (8) *it dragged it's trunk across the ground.* (9) *A few metres in front of it was a young man, coaxing it with a tempting bag filled with food. We watched as they slowly walked away."*

"Wow. And for my next question, what do you remember about your daughter's behaviour and reactions that night?"

"I remember she was completely in awe (10) *of the magnificent beast, just like I was. She was extremely surprised at it. She was complaining the whole way as well."* (11)

"And for my final question, what were your reasons for taking your granddaughter out that night and what do you think she gained from the experience?"

(12) *"My reason for taking her out were simple, number one, to give her an appreciation of animals and their lives and also, number two, to give her hope and the courage to live on till the end of the war. I wish she will have gained the courage and ability to never give up and that is a very important message. I want to share."* (13)

"Amazing. Thank you for that and I appreciate your finding the time in coming here today."

"No problem and thank you for the brilliant show."

(8) The candidate works out that the elephant seemed tired and lacking in energy (lethargic). This is an implicit idea – suggested by the way the animal is moving. Including implicit ideas as well as explicit ideas shows evidence of careful reading.

(9) The candidate mentions the creature they saw, but could show they had read the whole text carefully by mentioning that grandfather had seen the elephant earlier at the train station.

(10) The grandfather's feeling of awe at the elephant is mentioned – this is based on the suggestions in the text of the elephant's potential power and size. This development shows that the candidate is focused on the task and thinking about the events from the grandfather's point of view.

(11) The candidate offers a very short answer to the second question from the interviewer with just one clear idea – that Natalia was surprised to see the elephant. The candidate mentions her complaining which is not correct. She refused to go further, but followed him without complaining for most of their journey. This needed more careful explanation.

(12) The reason that it was Natalia's birthday is mentioned earlier in the answer. The candidate might suggest that this trip was also a present for her birthday. This idea is hinted at in the title of the text 'The Gift'.

(13) The candidate offers two more relevant ideas – that the trip to see the elephant was to give Natalia hope, and that grandfather hoped that seeing the elephant would help her to appreciate the wonders of nature/ the natural world. The candidate explains that this was important as this was all happening during wartime, showing that the candidate has read the text carefully.

5.4 How the answer could have been improved

The candidate includes a good range of ideas, but could have used more ideas from the text in response to the second bullet especially.

Some ideas are developed but opportunities are not always taken to suggest grandfather's feelings and his reactions looking back.

Planning ideas for each bullet before writing their response would have allowed the candidate to organise the route through their answer and make sure they made the best use of the ideas they had spotted rather than rely on the order of the text. For example, it could have been better to mention that it was Natalia's birthday in answer to the third bullet and suggest more clearly that this was a present for her, rather than including that information at the start of the answer.

The writing is mostly accurate, though there are some errors which could have been avoided with more careful checking.

At times, the candidate repeats vocabulary, e.g. 'slowly' – rather than offering a wider range by finding alternatives.

5.5 Common mistakes

Remember that the extended response task is designed to assess both your reading and writing skills. You need to provide the examiner with evidence to show the skills and understanding you have. You should try to avoid mistakes which suggest you have misread either the task or text. Below is a list of some of the common mistakes learners make:

- **Missing out one or more of the bullet points of the question**

Bullet points are included to help you plan your answer to show evidence of your reading skills and understanding. It is important to identify and include ideas relevant to all three of the bullet points.

- **Forgetting to include relevant details**

Details such as names, times and locations may be important evidence that you have read closely. Try to include all the details your audience would need to know to have a full understanding of the ideas you are including in your answer.

- **Drifting from the text.**

The task is designed to test how well you have read and understood the text. If your answer invents characters, events or information that are not mentioned or even hinted at in the text, you are missing the chance to show your reading skills and may have lost focus on the task and text. Make sure that any ideas you include in your answer have been suggested in the text or task.

- **Repeating the text**

Simply repeating what happens exactly as it happens in the text is not going to show that you are able to understand implicit meanings, or make judgements about what you have read. Make sure you pay attention to what the task is asking you to do, e.g. how it wants you to change perspective (point of view) to show that you have understood more than just the obvious, explicit ideas.

- **Writing from the wrong perspective**

The extended response task is designed to give you the best opportunities to show that you have read the text closely and understood the ideas and attitudes it contains. Make sure you pay close attention to the role you have been given, e.g. you may have been asked to be a particular character in the text and write from their point of view, or asked to write an article as if you were a journalist who had interviewed those involved.

- **Missing opportunities to develop ideas**

You will need to show evidence that you have not just considered the obvious surface meaning of what you have read, but can read more carefully. Reading carefully and closely will mean that you able to make judgements about what you have read and show that you understand the implications by extending ideas. Making judgements and extending ideas are examples of 'development' you might include to show reading skills at a higher level. You can think of 'development' as making obvious in your answer some of the meanings and ideas which are not as obvious in the original text, e.g. what a particular character might be thinking at a given point, or what they are likely to do next based on the evidence you have in the text.

- **Using inconsistent or faulty style**

Your response to the extended reading task will also be assessed for writing skills. It is important to control your writing throughout the whole response. Make sure that you do not include errors that affect the meaning of what you are writing. Do not lose focus on the type of text you are meant to be writing in your response, e.g.by forgetting to sign off in character at the end of a letter.

5.6 General advice

- Read the text and question carefully more than once.
- As you read the question, identify the perspective (the point of view or role) you are being asked to take in your answer.
- Underline the text type the question is asking you to use for your response, e.g. letter, interview, speech and keep this in mind for the whole response.
- Thinking from the perspective you have been asked to take, consider why you are writing (or speaking) and who you are imagining will be reading (or listening to) what you write or say.
- Use the bullet points in the question to plan the ideas you will include in your response. Make sure you include ideas for all three bullet points.
- Use your own words most of the time – try not to copy phrases or longer sections from the text.
- Remember to include all the important details your reader would need to know.
- Use and develop ideas from the text – if you find you are simply repeating ideas, re-read the question to check what you have missed.
- Control and correct your writing, e.g. keep tenses in agreement and use connecting words/phrases to link your ideas.
- Make sure that the voice and register you develop in your response fits your persona/role, audience and purpose.

Section 6: Revision

This advice will help you revise and prepare for the examinations. It is divided into general advice for all papers and more specific advice for Paper 1, and Paper 2.

Use the tick boxes ☐ to keep a record of what you have done, what you plan to do or what you understand.

General advice

Before the examination

- ☐ Find out when the examinations are and plan your revision timetable. Divide the time you plan to use into sections to cover each part of the course.
- ☐ Use this guide to find out how long each examination is, how many questions you have to answer, and how many marks there are for each question, to help you plan how long you have for each question.
- ☐ Find out the choices you have in each examination paper. Make sure you know how many sections there are and which sections you should answer from.
- ☐ When there is a choice of question types in a section, or a range of response types possible, make sure you revise all response and question types equally well.
- ☐ Make sure you understand the meaning of the words used in questions. Look at past examination papers, highlight the words and consider carefully what they are asking you to do.
- ☐ Make revision notes of errors to avoid and/or rules you need to remember, e.g. spellings you often get wrong, or how to punctuate direct speech correctly. Try different styles of notes, e.g. mind maps, cue cards, extended notes, colour coding, voice recordings, etc.
- ☐ Work for short periods then have a break. Revise small sections of the syllabus at a time.
- ☐ Test yourself by listing the main writing styles and their key features without looking at your notes.
- ☐ Make a list of the different question types in your examination paper(s) and the things you need to do, or avoid doing, for each type.
- ☐ Look at past paper questions so that you are clear about what to expect in an examination.
- ☐ Look at mark schemes to help you understand how the marks are awarded for each question.
- ☐ Read and listen to other writers and speakers of English. When revising, you do not have to read or listen to whole texts and could listen to excerpts or read short sections of longer texts. Write your own examination-type questions based on what you have read or try to write a paragraph in the same style as the writer.

In the examination

- [ ] Read the instructions on the examination paper carefully and make sure that you answer the correct number of questions from each section.
- [ ] Plan your time according to the marks for each question. For example, a question worth three marks requires less time and a shorter answer than one worth ten marks. If a question has several parts, then the parts with more marks will need more time and more developed answers.
- [ ] Do not leave out questions or parts of questions. Remember, no answer means no mark.
- [ ] Read each question carefully so that you are clear what you need to do.
    - Identify the key words – you could underline or highlight them.
    - Identify the other key words and guidance, e.g. if it is important to use your own words, or write no more than a certain number of words in your answer, the question will tell you.
- [ ] Read through all parts of a question before starting your answer. This will help to make sure you do not repeat material and waste time.
- [ ] Read any text(s) you are given in the examination more than once – circle or underline key information and ideas to use in your answer. You might find it useful to use a question mark or wiggly line next to anything in the text you are unsure of and need to look back at.
- [ ] Answer the question. Stay focused on what you are being asked to do and only write what is needed to answer the question.
- [ ] Plan your answer before you write them. Rambling, muddled or repetitious answers are unlikely to score well – if you know what you are planning to write before you start it is easier to communicate clearly and make efficient use of the time in the examination.
- [ ] Make sure that your answer is presented helpfully, e.g. your hand-writing is clear and any corrections you make to your work can be read easily. If you continue an answer on another sheet make sure that the continuation is clearly labelled to show the question number you are answering. Paper 1 advice

Paper 1 advice

Question 1: Comprehension

- [ ] Read Text A carefully before you answer any of the questions. As you deal with each question, look back at the section of the text it is asking about to work out your answer.
- [ ] Make sure you use your own words where the question tells you to do so.
- [ ] Pay attention to the specific evidence the question is asking for, e.g. if the question asks for two examples make sure you give two.
- [ ] Where a question asks you to explain how or why, make sure you explain ideas fully. You can use 'because', 'as' and 'since' to help you to do this.

Question 1: Summary task

- [ ] As you read Text B, underline ideas that will help you answer the focus of the summary task.
- [ ] Use your own words where possible when writing your summary. Do not use quotations or copy phrases or longer sections from Text B.
- [ ] Keep your summary objective – do not include personal experiences, comments or opinions.
- [ ] Only include ideas that directly answer the question, any redundant material or extra information from the text should not be included.
- [ ] Organise relevant ideas from the text into a logical order. Paragraph your summary if it is necessary and helpful to do so.
- [ ] Use connecting words/phrases to link or contrast ideas within and between sentences. Do not write in note form or list ideas.
- [ ] Ensure your summary is within the word limit. If it is too long, then it is not an effective summary.

Question 2: Short-answer questions

- [ ] Read the whole of Text C at least once before you start your answers to Question 2. You will need to show that you understand the meaning of words and phrases as they are used in this context not just the general meaning of them.
- [ ] Read each question carefully and pay attention to what you are being asked to do to show your understanding, e.g. if the question asks you to give one word or phrase do not give a whole sentence.
- [ ] Make sure you use your own words where the question tells you to do so.
- [ ] As you answer each question, look back at the section of Text C it is asking about in order to work out your answer.
- [ ] Where a question asks you to explain how or why, make sure you explain your ideas fully. You can use 'because', 'as' and 'since' to help you to do this.
- [ ] Remember when you are asked to use an example to explain, you will need to identify your example clearly, e.g. put quotation marks around any words taken from the text. Use your own words in the explanation of how the example chosen is working to suggest something particular to the reader.

Question 2: Language task

- [ ] Re-read both of the paragraphs identified in the question, underlining examples of words or phrases you might choose to explain in your answer.
- [ ] Select the strongest three examples from each paragraph – that is six in total. Try to include imagery and to choose examples you can best explain in detail.
- [ ] For each example you use, make sure that you explain the precise meaning in context and suggest exactly how the words/phrases are meant to make the reader feel in relation to the focus of the question (the 'effect' the writer wanted to create).

- [ ] To help you analyse and explain the effect of your examples, think of the associations of the each of the words and phrases the writer has used, e.g. consider where else you might expect to hear this word used, what picture(s) it creates, what sensation(s) it suggests.
- [ ] Use 'because', 'as' and 'since' to help you extend your explanations.
- [ ] Where you recognise connections or contrasts in how the writer has used language, explain them in a concluding general comment or overview.
- [ ] Make sure that your explanations are precise and specific – avoid empty general comments such as 'the writer uses a lot of description' and do not use the same explanation for more than one example.
- [ ] Remember Question 2 is not assessed for writing – this means it is better to try to find the right word to explain a meaning or effect precisely and show your understanding more fully, even if you are not quite sure of the spelling.

Question 3 Extended response to reading

Reading

- [ ] Pay attention to the perspective, audience, purpose and form required by the question.
- [ ] Use the bullet points to help plan the content for your answer.
- [ ] It is important to demonstrate your ability to interpret and use a good range of relevant ideas and details from the text.
- [ ] Make sure you cover all aspects of all three bullet points – this will help you to include evidence that you have understood implicit ideas and attitudes, as well as explicit. more obvious meanings.
- [ ] Use your own words where you can – do not just copy expressions from the text.
- [ ] Try to develop ideas – watch out for hints and suggestions in the text such as how characters might feel, or their reasons for behaving as they did.
- [ ] Extend explanations and ideas using the evidence you have found by reading Text C – do not invent completely new ideas or information that could not be backed up with details or clues from the text.

Writing

- [ ] Ensure the voice, style and register you use fits the persona/role, audience and purpose for the task.
- [ ] Plan the route through your answer before you start writing to make sure your ideas are ordered logically and linked helpfully for your reader.
- [ ] Keep in mind the text type that you are meant to be writing for the whole answer.
- [ ] Take time to read back and correct your answer to avoid errors which affect meaning.

Paper 2 advice

Section A Directed Writing

Writing

- [ ] Identify the purpose and form (text type) for the task as you read the question and keep these in mind as you plan and write your answer.
- [ ] Organise your ideas before writing and plan the structure of your response carefully so that is it helpful and clear for your reader. For example, if you are arguing a particular point of view make sure you build your argument logically and persuasively, rather than just list ideas or track through points in the same order as the text(s).
- [ ] Use vocabulary carefully and deliberately – try to use a range of precise and appropriate words, rather than repeating the same words, using very simple words or copying vocabulary from the text(s).
- [ ] Control sentence structures, keep tenses in agreement and use connecting words/ phrases to link your ideas.
- [ ] Be aware of the audience for your response and adapt your written style to suit the kind of style your reader/ listener would expect.

- [ ] Check and correct your writing to avoid errors in spelling, punctuation and grammar.

Reading

- [ ] Read the text(s) carefully, underlining ideas that will help you address the task. Plan to use ideas from the whole text, or both texts, in your answer.
- [ ] Do not just repeat ideas from the text(s) – be prepared to criticise or question the ideas in the text(s).
- [ ] As you read the text(s), look for clues to the attitudes of writers or speakers which may affect their viewpoint or suggest that something they say may be biased.
- [ ] Include a range of ideas from the text(s) – including implicit (more subtle) ideas as well as explicit (more obvious) ones and evaluating at least some ideas in depth.
- [ ] Make sure the ideas you use are derived from the text(s) – paying attention to the bullet points when you are planning your content will help you to do this.

Section B Composition

- [ ] Consider all four choices of task before selecting the one you feel will best allow you to demonstrate your skills as a writer.
- [ ] Remember the key features of the type of writing you choose – descriptive or narrative – and keep these in mind as you plan and write your composition.
- [ ] Plan your route through your composition – including how it will end – before you start writing.
- [ ] Try to be convincing and original in your use of detail.
- [ ] Choose your vocabulary and sentence structures carefully to create specific effects.
- [ ] Check your writing carefully and correct errors especially those which will badly affect your mark, such as basic spelling, tense and punctuation mistakes.

Component 3 advice

Coursework portfolio

- [ ] Do not leave writing your coursework assignments until the last minute.
- [ ] Adapt your writing to demonstrate a different writing intention and style in each assignment.
- [ ] Plan your assignment beforehand and be prepared to revise, edit and draft your response to make sure it best suits your audience and purpose.
- [ ] Re-read each draft carefully and correct any errors in grammar, spelling, paragraphing, sentence structure or punctuation.
- [ ] Choose your vocabulary and sentence structures carefully to create specific effects.
- [ ] Always think carefully about which tense you should be using, and check that your tenses are always in agreement.
- [ ] It is generally better that you complete more than three assignments during your course from which a suitable choice can be made for your final portfolio.

Assignment 1: Writing to discuss, argue and/or persuade in response to a text or texts

Reading

- [ ] Your response should include an overview of the argument in the text(s) as a whole.
- [ ] Show your understanding by commenting on specific ideas presented by the author of the text(s).
- [ ] Do not just repeat ideas from the text(s) – be prepared to criticise or question the ideas in the text(s).

- [ ] As you read the text(s), you look for clues to the attitudes of writers or speakers which may affect their viewpoint or suggest that something they say may be biased.
- [ ] You evaluate a range of ideas - including implicit (more subtle) ideas as well as explicit (more obvious) ones.

Writing

- [ ] Keep the purpose and form (text-type) for the task in mind as you plan and write your assignment.
- [ ] Organise your ideas before writing and plan the structure of your response carefully so that is it helpful and clear for your reader. For example, if you are arguing a particular point of view make sure you build your argument logically and persuasively, rather than just list ideas or track through in the same order as the text(s).
- [ ] Use vocabulary carefully and deliberately – try to use a range of precise and appropriate words, rather than repeating the same words, using very simple words or copying vocabulary from the text(s).
- [ ] Control sentence structures, keep tenses in agreement and use connecting words/ phrases to link your ideas.
- [ ] Be aware of the audience for your response and adapt your written style to suit the kind of style your reader/listener would expect.
- [ ] Check and correct your writing to avoid errors in spelling, punctuation and grammar.

Assignment 2: Writing to describe

- [ ] Remember the key features of descriptive writing and keep these in mind as you plan and write your assignment.
- [ ] Plan your route through your description – including how you will vary the focus – before you start writing.
- [ ] Develop the ideas and images you include carefully using well-chosen details.
- [ ] Try to develop a convincing overall picture.
- [ ] Choose your vocabulary and sentence structures carefully to create specific effects.
- [ ] Check your writing carefully and correct errors in spelling, tense and punctuation mistakes.
- [ ] Be prepared to revise and redraft your assignment to find the best way to engage your reader.

Assignment 3: Writing to narrate

- [ ] Remember the key features of narrative writing and keep these in mind as you plan and write your assignment.
- [ ] Plan your route through your narrative – including any twists or turns in the plot and how you will end – before you start writing.
- [ ] Decide how best to begin your story to interest your reader from the start.
- [ ] Avoid using clichés. Try to 'show rather than tell' your reader, e.g. include convincing details.
- [ ] Choose your vocabulary and sentence structures carefully to create specific effects.
- [ ] Check your writing carefully and correct errors in spelling, tense and punctuation mistakes.
- [ ] Be prepared to revise and redraft your assignment to find the best way to engage your reader.

Component 4 advice

Speaking and listening

- [ ] Speak clearly and audibly.
- [ ] Offer full explanations.
- [ ] Take account of your listener and consider their reaction(s) to what you say.
- [ ] Use a range of vocabulary to express your ideas.
- [ ] Adapt the way you speak to suit your purpose, e.g. by varying your use of tone or emphasis for effect.

Part 1 Individual Talk

- [ ] Choose a theme or topic of particular interest which will allow you to create a lively presentation.
- [ ] Think about the kind of questions you might be asked about your planned topic – if you cannot think of any questions, it may be that the topic is not interesting enough and you might want to change it.
- [ ] Prepare and organise the ideas for your talk beforehand – you can bring one small cue card into the examination room to remind you of the points you want to make, but you are not allowed a script or extended notes.
- [ ] Think about how you will gain and maintain the interest of your audience, e.g. by making use of creative presentational styles such as taking up a 'voice'.
- [ ] Practise your talk before you undertake the recorded assessment but do not try to memorise everything you will say – you need to be able to talk naturally and take account of your audience as you speak.

Part 2 Conversation

- [ ] Try to respond fully to any question the teacher/examiner asks, offering reasons and/or examples to support your ideas, thoughts and opinions.
- [ ] Try to develop the conversation by asking the teacher/examiner questions, or moving the conversation on by introducing another relevant discussion aspect, point or idea.
- [ ] Listen to any suggestions and comments from the examiner but do more than simply agree or disagree. Be confident to extend what they are saying with further explanation or examples to illustrate the point, and/or suggest an alternative viewpoint.

Revision checklists

This section of your guide provides some revision checklists you can use to help focus your revision. These checklists do not cover everything you need to know in detail, but will provide you with an overview of the skills and knowledge from the syllabus that you should revise. For more details you should talk to your teacher about what the syllabus requires.

The table headings are explained below:

Question type	You should be able to	R	A	G	Comments
Questions for each paper.	Skills and understanding you need to cover.	You can use the tick boxes to show when you have revised a part of the course and how confident you feel about it. R = RED means you are really unsure and lack confidence in that skill; you might want to focus your revision here and possibly talk to your teacher for help A = AMBER means you are reasonably confident in a skill but need some extra practice G = GREEN means you are very confident in a skill. As your revision progresses, you can concentrate on the RED and AMBER skills in order to turn them into GREEN. You might find it helpful to highlight each skill in red, orange or green to help you prioritise.			You can use the 'Comments' column to: • add more information about the details for each point • include a reference to a useful resource • add learning aids such as rhymes, poems or word play • highlight areas of difficulty or things that you need to talk to your teacher about.

Remember to check which of the four course components you are taking – Paper 1 Reading, Paper 2 Directed Writing and Composition, Component 3 Coursework Portfolio and/or Component 4 Speaking and Listening Test – then use the relevant revision checklists on the next pages to help plan and guide your revision.

Paper 1 Reading

Question type	You should be able to	R	A	G	Comments
1(a–e)	Find evidence in the text of explicit (more obvious) ideas	☐	☐	☐	
1(a–e)	Use your own words to explain explicit (more obvious) ideas from the text	☐	☐	☐	
1(a–e)	Identify and explain implied (more subtle) ideas in a text	☐	☐	☐	
1(f)	Select relevant ideas from the text to answer the summary question	☐	☐	☐	
1(f)	Organise and structure your summary response helpfully for your reader and to avoid repetition	☐	☐	☐	
1(f)	Use your own words, concisely, to show you have understood a wide range of relevant ideas from the text	☐	☐	☐	
		☐	☐	☐	
2(a–b)	Find a word or phrase in the text with a particular meaning	☐	☐	☐	
2(a–b)	Use your own words to explain the precise meaning of a word or phrase used by a writer	☐	☐	☐	
2(c)	Use examples from a short section of text to explain how a writer makes the reader feel about a character, event or setting	☐	☐	☐	
2(d)	Choose a range of interesting examples of words or phrases (including imagery) from two paragraphs of text	☐	☐	☐	
2(d)	Explain the precise meanings of each of the words and phrases you have chosen	☐	☐	☐	

Question type	You should be able to	R	A	G	Comments
2(d)	Explain how and why the writer has used this language to create specific effects	☐	☐	☐	
3	Take account of the persona/role, purpose and audience for the task	☐	☐	☐	
3	Consider ideas in the text from a different perspective to that of the Original, e.g. from a different character's point of view or a different point in time	☐	☐	☐	
3	Adapt your writing to suit different text types, e.g. letter, report, article, journal, speech and interview	☐	☐	☐	
3	Identify a wide range of relevant ideas from the text to fully address each bullet point of the task	☐	☐	☐	
3	Use your own words to respond to the task fluently, accurately and clearly	☐	☐	☐	
3	Develop and extend ideas based on the hints and more subtle details of the text	☐	☐	☐	

Paper 2 Writing

Question type	You should be able to	R	A	G	Comments
Question 1 Section A	Use an appropriate register (discuss/argue/persuade)	☐	☐	☐	
	Identify relevant ideas from the text to address the task bullet points	☐	☐	☐	
	Evaluate the information (facts and ideas) in the text(s) for use in your answer	☐	☐	☐	
	Adapt your writing to suit different text types, e.g. speech, letter, article	☐	☐	☐	
	Make accurate use of spelling, punctuation and grammar	☐	☐	☐	
	Take account of your audience, e.g. organise ideas and opinions	☐	☐	☐	
	Recognise and respond to implicit meanings and attitudes – including perspectives, opinions and bias	☐	☐	☐	

Question type	You should be able to	R	A	G	Comments
Question 2/3/4/5 Section B	Use the title/task to plan relevant and interesting content ideas before you write your composition	☐	☐	☐	
	Engage and interest the reader in your answer	☐	☐	☐	
	Organise and structure your answer deliberately for effect	☐	☐	☐	
	Develop the plot clearly in narratives, e.g. use description, characterisation and convincing details	☐	☐	☐	
	In descriptions, create a convincing overall picture with varieties of focus	☐	☐	☐	
	Use precise, well-chosen vocabulary and varied sentence structures, chosen for effect	☐	☐	☐	
	Use an appropriate register for your response	☐	☐	☐	
	Avoid errors in spelling, punctuation and grammar	☐	☐	☐	

Component 3 Coursework

Question type	You should be able to	R	A	G	Comments
All assignments	Use an appropriate register for each response	☐	☐	☐	
	Plan, redraft and revise your writing to make it more engaging and effective for your reader	☐	☐	☐	
	Identify and correct errors in spelling, punctuation and grammar	☐	☐	☐	
	Use precise, well-chosen vocabulary and varied sentence structures appropriate to context	☐	☐	☐	
	Organise and structure your ideas and opinions for deliberate effect	☐	☐	☐	
Assignment 3	Develop the plot clearly, e.g. use description, characterisation and convincing details	☐	☐	☐	
Assignment 2	Create a convincing overall picture with varieties of focus	☐	☐	☐	
Assignment 1	Adapt your writing to suit different text types – e.g. speech, letter or article – and different purposes (discuss, argue and/or persuade)	☐	☐	☐	
Assignment 1	Identify relevant ideas from the text to address the bullet points of the task	☐	☐	☐	
Assignment 1	Recognise and respond to implicit meanings and attitudes – including perspectives, opinions and bias	☐	☐	☐	

Component 4 Speaking and Listening Test

Question type	You should be able to	R	A	G	Comments
Task 1: Individual task and Task 2: Conversation	Express what you feel, think or imagine in some detail without relying on or reading from extended notes or a script	☐	☐	☐	
	Take account of your audience – e.g. by ordering your ideas helpfully and using a lively style of delivery	☐	☐	☐	
	Explain experience(s) clearly and effectively – e.g. using tone or emphasis for effect	☐	☐	☐	
Task 2: Conversation	Listen carefully to what the teacher/examiner says during your conversation and respond fully to their questions and ideas	☐	☐	☐	
	Speak on equal terms with the teacher/examiner during your conversation	☐	☐	☐	

Section 7: Useful websites

The websites listed below are useful resources to help you study for your Cambridge IGCSE First Language English course.

www.cambridgeinternational.org/cambridge-for/parents-and-students/in-class/study-resources/
This is the Cambridge International Assessment Education public website where you can find the syllabus and the most recent past papers to download in the **Resource centre**.

Please note: The website links below provide direct access to internet resources. Cambridge Assessment International Education is not responsible for the accuracy or content of information contained in these sites. The inclusion of a link to an external website should not be understood to be an endorsement of that website or the site's owners (or their products/services).

The website pages were selected when the guide was produced. Other aspects of the sites were not checked.

https://www.thepaperboy.com/uk/index.cfm
This provides front page articles from a variety of newspapers in real time.

www.ted.com/talks
Find some interesting and engaging talks to study and analyse.

http://www.bbc.co.uk/learningenglish
Some interesting activities, games and videos to help secure your skills of writing, reading and, speaking and listening. This website also has the feature of learning English with the support of other languages, e.g. Mandarin, Gujarat and Hindi.

learnenglish.britishcouncil.org/en/
This site contains resources and activities to help improve your English.

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Cambridge Professional Development Pricing – North America

1 August 2025 thru 31 July 2026

We believe that supporting teachers in their professional development leads to improved outcomes for learners. Good quality professional development and reflective practice are essential parts of a teacher's professional life. We offer a range of different professional development opportunities for teachers at all stages of their professional journey, so you can find something that meets your needs.

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Open courses are available for booking by any Cambridge teacher, and can be booked via the Professional Development Calendar. Please contact Customer Support if you need assistance making a booking.

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Schools and districts in North America can request *open* or *private* training to be held at their facilities. To request any Cambridge professional development courses, please complete this form and our team will respond with options and pricing.

What a Cambridge Classroom Looks Like

This 4-hour course introduces four key approaches which are the foundations of a Cambridge classroom: active learning, assessment for learning, metacognition, and inclusion. Explore what these approaches look like in practice and start building a practical toolkit of strategies.

Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	n/a	n/a	$3,725.00
Virtual	$96.00	$120.00	$3,195.00

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Syllabus-specific courses

Introduction

Introduction courses are for teachers who are new to Cambridge or to a specific syllabus or programme. More information can be found on our website.

Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$518.00	$576.00	$11,915.00
Virtual	$168.00	$210.00	$3,865.00
Online	$168.00	$210.00	$3,865.00

Focus on Teaching

Focus on Teaching courses are for teachers who want to explore a specific area of teaching and learning within a syllabus or programme. More information can be found on our website.

Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$284.00	$316.00	$6,540.00
Virtual	$96.00	$120.00	$2,210.00
Online	$112.00	$140.00	$2,575.00

Focus on Assessment (IGCSE and Advanced) or Progress (PLS)

Focus on Assessment courses are for teachers who want to understand the assessment of a syllabus in greater depth. More information can be found on our website.

Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$569.00	$632.00	$13,085.00
Virtual	$136.00	$170.00	$3,130.00
Online	$112.00	$140.00	$2,575.00

Marking Workshops

Our syllabus-specific marking and coursework marking workshops help teachers build their confidence in assessing students' work. More information can be found on our website.

Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Virtual *per component	$80.00	$100.00	$3,195.00
Online	$112.00	$140.00	$2,575.00

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Improving Speaking

Our Improving Speaking Performance courses help language teachers to improve their speaking lessons and understand how to better support their students. More information can be found on our website.

Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Online	$168.00	$210.00	$3,865.00

Enrichment courses

Our Enrichment Professional Development is perfect for teachers and school leaders who want to transform their approach to teaching.

We design our Enrichment courses to be dynamic and engaging. Our experienced trainers encourage teachers and leaders to reflect on their professional practice and help them to develop practical strategies they can use in their schools. Participants are also encouraged to share ideas and learn from other members of the Cambridge International community.

Each course focuses on a specific skill or concept in teaching and learning. For example:

- Active Learning and Assessment for Learning
- Metacognition: Boosting Students' Learning
- Effective Talk and Questioning
- Responsive Education for All Learners

Some courses also concentrate on a particular subject or syllabus. More information can be found on our website.

Format	Early Bird Pricing	Regular Pricing	Private Course Max 30 participants
Face-to-face	$548.00	$609.00	$12,605.00
Virtual	$168.00	$210.00	$3,865.00
Online	$168.00	$210.00	$3,865.00

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CAMBRIDGE

Cambridge School Leader Standards






Cambridge is committed to supporting the continuing improvement of the quality of educational outcomes for all learners following Cambridge programmes in schools around the world.

We recognise that classroom teaching has the largest impact on the quality of educational outcomes. What teachers know and do makes the difference in improving student learning outcomes – their knowledge, pedagogical practices and relationships with students.

We also recognise that teachers cannot achieve and sustain high-quality outcomes for all students without effective leadership. In support of this, we have developed the Cambridge School Leader Standards to define key characteristics and practices of effective leaders.

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1. Leadership values and attributes 5
2. School culture and environment 5
3. Leadership skills and practices 6
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What we mean by school leaders

These Standards presume that in each Cambridge school there is one individual who has overall responsibility for implementing the school's vision. This person is ultimately accountable for the learning outcomes of all students. We see this as a unique and vital position and role within the school. Cambridge schools use a variety of titles for this leadership position. In many cases, this person is also the chief executive, accountable directly to the governing body of the school. In other cases, the school's senior educational leader may be accountable to a chief executive or director who does not have an educational leadership role. In the context of the Cambridge School Leader Standards, we define the principal school leader as the individual who has the responsibility as well as the professional training, knowledge, skills and experience to be the senior educational leader.

Of course, leadership is not only a function of one particular senior and experienced individual in a school. It is also a collective process that includes a wider group of people. We are committed to the principle of distributed leadership. This is where both the responsibility and delegated authority for leading specific aspects of the school's work are distributed among the staff. From individual teachers to the senior leadership team, it includes all those with leadership responsibilities. Pastoral heads, heads of subject departments, curriculum coordinators and others will find that both the Cambridge Teacher Standards and some of the Cambridge School Leader Standards are relevant to their work. Teachers who aspire to positions of leadership will also want to use the Standards to reflect on their professional characteristics and skills, and to shape their own professional development.

In contemporary educational research, leadership is typically seen as focussing on bringing about change and improvement to achieve the school's vision and mission. Management, however, is seen as making sure the school is stable, coherent and sustainable. Typically, effective school leaders will also have specific management responsibilities requiring particular knowledge, skills and practices. These Standards include school leaders' responsibilities for effective management systems. However, there are senior management responsibilities that do not come within the scope of the Standards. These include managing school facilities, human resources, fund-raising and development, and others. Where appropriate, these management responsibilities are addressed within the Cambridge Standards for Schools.

Purposes and audiences for the Cambridge School Leader Standards

The first purpose of the Cambridge School Leader Standards is to define the range of characteristics and practices of school leaders needed to effectively provide Cambridge programmes. They derive from and are consistent with contemporary international research into effective school leadership. School leaders who use the Standards to evaluate their own leadership practice and guide their continuing professional development will be in a strong position to achieve the desired student outcomes from Cambridge programmes, and to be leaders in their profession.

Secondly, the Standards are intended for school leaders themselves to use, to confirm successful leadership practice and help determine areas and priorities for their own professional development. This might include taking Cambridge advanced qualifications in educational leadership. Those who aspire to become school leaders will find the Standards a helpful guide to the scope of the role and the need for further development. If you are head of a school, you may also use the Standards to review the strengths of your senior team, to inform decisions about skill gaps and needs for team development.

Thirdly, the Standards will be of value to school boards and governing bodies in respect of their responsibilities and duties for overseeing school leadership. The definition of effective leadership represented by the Standards will support recruitment and retention processes, and will inform the governance responsibility for holding school leaders accountable for their work. The Standards will also help boards to understand and support the professional development needs and priorities of both the serving and the aspiring leaders they are responsible for.

Fourthly, the Standards will inform the understanding of leadership within the school. School leaders are accountable to their employers and to the community of parents and others that the school serves. They are also accountable to their staff and students for the quality and style of leadership that they provide and how it shapes and directs the school community. This also includes the outcomes of the school's collective work. The Standards provide a common language and a framework of expectations that will help the school community reflect on how effective its leadership is.

The Cambridge School Leader Standards in context

We have developed the Cambridge School Leader Standards alongside the Cambridge Teacher Standards, and with the Cambridge Standards for Schools, which are intended to support schools with their self-evaluation processes. Our series of statements about the attributes of Cambridge learners, teachers and leaders have also informed these Standards.

The three sets of Standards are designed to help schools provide high-quality Cambridge programmes, and are complementary to and consistent with each other. In particular, the Cambridge Teacher and School Leader Standards recognise that the career path of most school leaders has included teaching and middle leadership positions. These two sets of Standards have been designed and structured with this progression in mind.

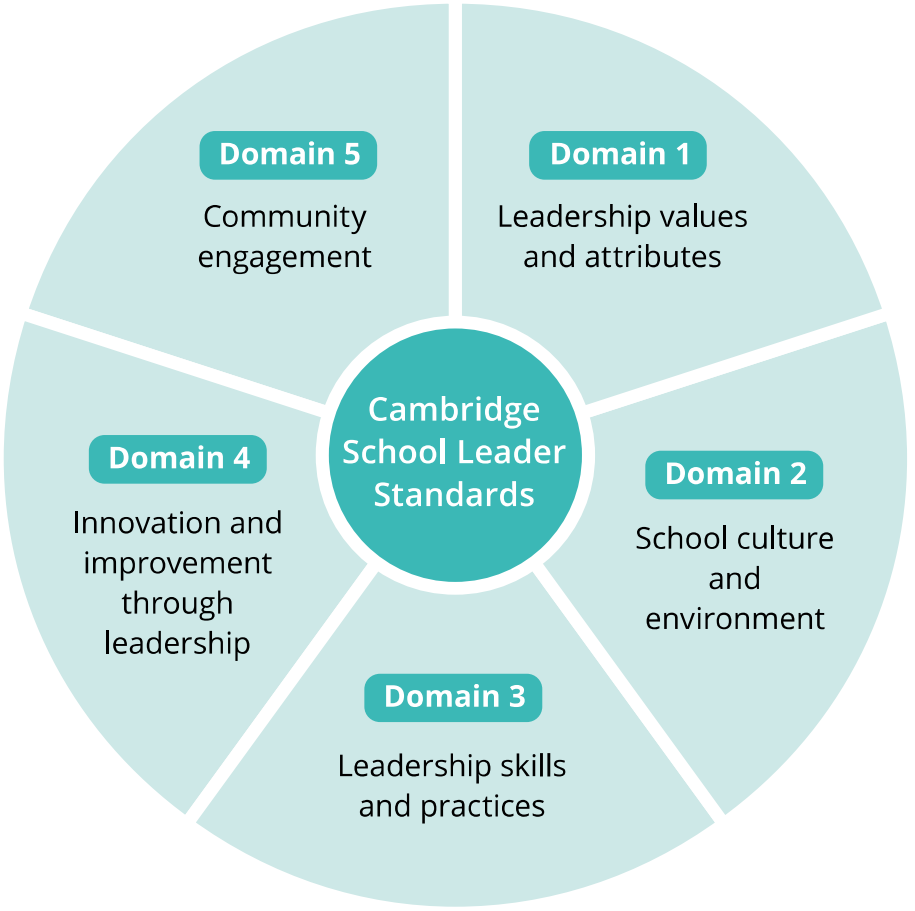
The structure and organisation of the Cambridge School Leader Standards

There are 25 Standard statements, organised under five domains. The individual Standard statements are detailed and concrete. This should allow heads of schools and other users to clearly understand how to show they have met individual Standards.

Together, these five domains of Standards make up our definition of the range of characteristics and practices that are needed to lead a Cambridge school, founded on contemporary international educational research.

We also recognise that school leadership is contextual. Cambridge schools are found in 160 countries, in a range of different political, social, cultural, economic and educational-historical settings. This variety means that detailed recommendations will not be relevant or helpful. Effective school leaders will take lessons from educational research and their own experience, adapt them intelligently and apply them reflectively to their current context.

We have designed the Standards to be as open as possible so school leaders can apply them to their own contexts. They are based on the principle that effective school leadership has many common practices, so they are relevant to all leaders in Cambridge schools. What will vary is the way that the leadership practices are applied, depending on each school's context and the capabilities of the individual, the senior team and the school staff.



1 Leadership values and attributes

Cambridge school leaders:

Standard 1 provide a strong sense of direction and a clear vision for the school

Standard 2 prioritise the physical, emotional, and psychological wellbeing of students and staff, ensuring a safe and healthy environment

Standard 3 model the highest standards of ethical conduct in their interactions with the school community

Standard 4 empower staff by distributing professional responsibilities and establishing shared accountability

Standard 5 model a commitment to reflective practice and lifelong learning.

2 School culture and environment

Cambridge school leaders:

Standard 1 establish a culture of high expectations for all, in regard to learning outcomes, behaviours and attitudes

Standard 2 demonstrate emotional intelligence and empathy in leadership to foster a fair and inclusive environment

Standard 3 establish professional relationships with all members of the school community

Standard 4 motivate and encourage teachers to take responsibility for the development of effective learning and teaching

Standard 5 enrich the learning culture of their school by establishing partnerships with other institutions, professional bodies and educational organisations.

3 Leadership skills and practices

Cambridge school leaders:

Standard 1 demonstrate knowledge and understanding of current research into educational leadership and the practices of effective leaders, and use it to support the reflective evaluation of their own practice

Standard 2 keep up to date with the latest research and evidence into effective curriculum, pedagogy and assessment

Standard 3 make sure that the school has appropriate policies and procedures in place, as well as written roles and responsibilities, which are reflected in operational practice

Standard 4 demonstrate a consistent commitment to the professional learning and development of all staff, including the development of their leadership potential

Standard 5 plan and budget for the annual cycle informed by evidence, data and curriculum requirements

Standard 6 develop a leadership team that meets the school's operational and developmental needs.

4 Innovation and improvement through leadership

Cambridge school leaders:

Standard 1 understand the principles and practices of school improvement, leadership and management of change to enable the school to grow and flourish

Standard 2 create a professional culture in which innovation and collaboration for the improvement of learning and teaching practice are encouraged

Standard 3 allocate time and resources for the evaluation and improvement planning process that is based on data and stakeholder input

Standard 4 establish and review documented procedures that evaluate staff performance and inform professional development needs

Standard 5 promote and model collaboration among all staff to evaluate and share effective practice and to develop content knowledge and pedagogy

Standard 6 establish whole-school responsibility for the implementation, monitoring and evaluation of the improvement plan.

5 Community engagement

Cambridge school leaders:

Standard 1 actively engage with the wider community to build strong partnerships and collaborative relationships that support and reflect the purpose and values of the school

Standard 2 promote and facilitate the involvement of parents and carers in the life of the school

Standard 3 inspire student participation in the wider community, contributing to their development as responsible, active citizens.

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Cambridge Teacher Standards



Cambridge is committed to supporting the continuing improvement of the quality of educational outcomes for all learners following Cambridge programmes in schools around the world.

We recognise that classroom teaching has the largest impact on the quality of educational outcomes. What teachers know and do makes the difference in improving student learning outcomes – their knowledge, pedagogical practices and relationships with students.

In support of this, we have developed the Cambridge Teacher Standards to define key characteristics and practices of effective teachers.

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2. Classroom culture and environment 4
3. Teaching skills and practices 5
4. Innovation and improvement in teaching and learning 5
5. Community engagement 6

Purposes of the Cambridge Teacher Standards

The primary purpose of the Cambridge Teacher Standards is to define the range of teacher characteristics and practices needed to deliver Cambridge programmes effectively. They derive from and are consistent with contemporary international research into effective teaching.

Teachers who use the standards to evaluate their own practice and guide their continuing professional development should be in a strong position to achieve the desired student outcomes from Cambridge programmes.

The standards provide a benchmark of what we consider to be teacher quality. They can be used by teachers to confirm successful teaching practice and help determine areas and priorities for their own professional development. This might include participating in an appropriate Cambridge Professional Development Qualification (PDQ) programme. Teachers aspiring to develop their career prospects will find the standards a helpful guide to the scope of the teaching role and aspects they want to develop.

The Cambridge Teacher Standards in context

We have developed the Cambridge Teacher Standards alongside:

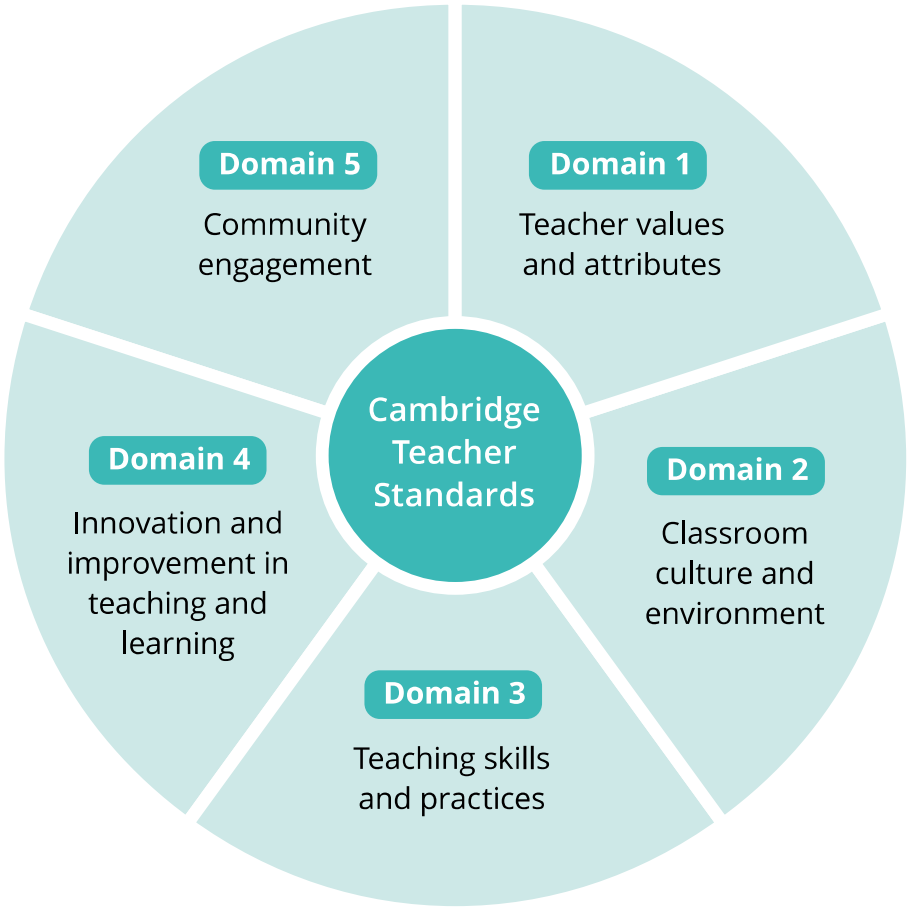
- the Cambridge Standards for Schools, which help schools carry out self-evaluations
- the Cambridge School Leader Standards, which define the range of characteristics and practices school leaders need to provide Cambridge programmes effectively.

Our statements about the attributes of Cambridge learners and teachers are also relevant. All these documents are intended to help schools provide high-quality Cambridge programmes, and are complementary to and consistent with each other.

We recognise that school teaching is dependent on context. Cambridge schools are found in 160 countries, in a range of different political, social, cultural, economic and educational-historical settings. This variety means that detailed recommendations will not be relevant or helpful. Effective teachers will learn from educational research and their own experience, adapt ideas intelligently and apply them to their current context. We have designed the Cambridge Teacher Standards to be as open as possible so teachers can apply them to their own contexts. They are based on the principle that effective teaching has many common practices, so they are relevant to all teachers in Cambridge schools.

The structure and organisation of the Cambridge Teacher Standards

There are five Cambridge Teacher domains. Each domain contains a number of individual standard statements that are detailed and concrete. They outline what a teacher should know and be able to do, or demonstrate, in terms of their professional knowledge, practice and engagement. This should allow teachers to understand how to show they have met individual domains within the standards.



1 Teacher values and attributes

Teachers:

Standard 1 demonstrate a shared understanding of the school's vision, mission and objectives

Standard 2 model the highest standards of ethical conduct in their interactions with the school community

Standard 3 make a positive contribution to the wider life and ethos of the school

Standard 4 demonstrate a commitment to lifelong learning by engaging in reflective practice

Standard 5 demonstrate a consistent commitment to well-being for the whole community.

2 Classroom culture and environment

Teachers:

Standard 1 create a classroom culture and environment where all students are supported in their learning

Standard 2 establish positive and productive relationships with all students to support their learning and achievement

Standard 3 have high expectations of themselves in their professional practice

Standard 4 have high expectations of all students

Standard 5 work effectively with colleagues to develop the curriculum and enhance student learning.

3 Teaching skills and practices

Teachers:

Standard 1 demonstrate knowledge and understanding of how students learn and how this impacts on teaching

Standard 2 demonstrate secure content knowledge and pedagogy to plan coherent, authentic and engaging learning programmes and lessons

Standard 3 have a deep understanding of the diverse needs of students and adapt their practice accordingly

Standard 4 orientate their students and ensure they are ready to learn

Standard 5 use effective teaching strategies to motivate, challenge and extend student learning

Standard 6 use a range of assessment strategies to inform next steps in the teaching and learning process and to provide timely, accurate and constructive feedback

Standard 7 use summative assessment to understand student progress and attainment

Standard 8 manage time effectively and ensure the classroom is free from disruption.

4 Innovation and improvement in teaching and learning

Teachers:

Standard 1 engage in reflective practice to improve the teaching and learning process

Standard 2 use a variety of teaching and learning strategies that encourage the development of students' problem-solving, metacognitive, critical and creative thinking skills

Standard 3 demonstrate effective use of digital technologies to extend learning to enhance student knowledge, skills and conceptual understanding

Standard 4 share key information on progress, attainment and areas for development with colleagues, and collaboratively work towards improving student learning

Standard 5 critically engage with research and evidence in learning and teaching, and apply new ideas and approaches to improve the quality of their practice.

5 Community engagement

Teachers:

Standard 1 involve parents and carers in school life to support student learning

Standard 2 engage with the wider community to contribute to the school's life, vision and mission

Standard 3 encourage student participation in the wider community, contributing to their development as responsible, active citizens

Standard 4 establish professional relationships with colleagues in other institutions, professional bodies and educational organisations to develop professional practice.

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Cambridge Presentation of Psychometric Evidence

Narrative point ~ Evidence detail	Evidence type	Evidence source
General test information		
Rationale and purpose of test		
The purpose of Cambridge International AS & A Levels as courses of study: *"Cambridge International AS & A Level develops learners' knowledge, understanding and skills in:* • *In-depth subject content* • *Independent thinking* • *Applying knowledge and understanding to new as well as familiar situations* • *Handling and evaluating different types of information source* • *Thinking logically and presenting ordered and coherent arguments* • *Making judgements, recommendations and decisions* • *Presenting reasoned explanations, understanding implications and communicating them logically and clearly* • *Working and communicating in English"*	Qualitative	Online information: Overview of AS & A Level curriculum Web: cambridgeinternational.org/.../cambridge-international-as-and-a-levels/curriculum/
The purpose, value and aims of an AS & A Level qualification: Economics: *"Cambridge International AS & A Level Economics provides learners with the skills needed to use economics in work or further study, including how to explain and analyse economic issues and arguments, evaluate economic information, and organise, present and communicate ideas and judgements clearly."* (p.2) Design & Technology: *"This syllabus encourages candidates to be innovative and creative and to develop their ability to design high-quality products. Through their studies, candidates will: develop an awareness of the significance of design and technology to society; learn more about production processes and industrial practices; and develop critical evaluation skills which they can employ in a variety of technical, aesthetic, economic, environmental, social and cultural contexts. As a result, candidates will also become discerning consumers of design and technology, able to make informed choices."* (p.7)	Qualitative	Syllabus document – Cambridge International AS & A Level – Economics 9708 (version 2; for exams in 2023, 2024 and 2025) Web: cambridgeinternational.org/.../595463-2023-2025-syllabus Cambridge International AS & A Level – Design & Technology 9705 (version 1; for exams in 2024) Web: cambridgeinternational.org/.../651351-2024-syllabus *NB: These are examples taken from two Cambridge AS & A Level syllabuses; syllabus documents for all syllabuses are provided in the Faculty packets.*
Cambridge International AS & A Level qualifications generally have a modular structure, with Cambridge International AS Levels offered as a standalone qualification, or as part of a progression to Cambridge International A Level. The structure of the assessment and of subject content reflects this relationship.		Presentation document: Comparing AS Level and A Level Doc: [01_pres_Comparing AS Level and A Level]
Name(s) and institutional affiliations of the principal author(s) or consultant(s)		
Cambridge draws upon external consultants and SMEs for syllabus development, test development, and scoring. There are comprehensively documented protocols and procedures.	Qualitative	Policy document: Cambridge International Code of Practice • §2.11 and §3.1 Web: cambridgeinternational.org/.../416992-code-of-practice Operational document: Assessment Staff Manual: Chapter 4 – Selection of assessment specialists • §4.2 – Considerations when Selecting Assessment Specialists Doc: [02_proc_ASM_chapter_04]
Cambridge only engages Assessment Specialists with the requisite qualifications and experience of ***both*** the subject area ***and*** assessment theory and practice.	Qualitative	Presentation document: Presentation of consultants' credentials Doc: [03_pres_consultant_credentials]

Narrative point ~ Evidence detail	Evidence type	Evidence source
Types of scores reported for examinees		
Candidates' attainment is reported on a letter scale from 'A*' to 'E' or 'a' to 'e', where candidates have meet the required standard, or 'U' or 'u' (i.e. 'ungraded'), where they have not. *"Grades A*, A, B, C, D or E indicate the standard a candidate achieved at Cambridge International A Level, with A* being the highest grade.* *Grades a, b, c, d or e indicate the standard a candidate achieved at Cambridge International AS Level, with 'a' being the highest grade.* *'Ungraded' means that the candidate's performance did not meet the standard required for the lowest grade (E or e).* *If a candidate takes a Cambridge International A Level and fails to achieve grade E or higher, a Cambridge International AS Level grade will be awarded if both of the following apply:* • *the components taken for the Cambridge International A Level by the candidate in that series included all the components making up a Cambridge International AS Level* • *the candidate's performance on the AS Level components was sufficient to merit the award of a Cambridge International AS Level grade."* (p.37)	Qualitative	Syllabus document: Cambridge International AS & A Level – Economics 9708 (version 2; for exams in 2023, 2024 and 2025) Web: cambridgeinternational.org/.../595463-2023-2025-syllabus *NB: This information is presented in all syllabus documents; syllabus documents for all syllabuses are provided in the Faculty packets.*
Additionally, candidates are provided with a 'percentage uniform mark' (PUM). This is similar to a scale score, and locates their performance within a score band on a standardised scale. *"The Percentage Uniform Mark for GCE AS Level and GCE A Level is provided in addition to the grade for a syllabus. The Percentage Uniform Mark is not the total mark achieved for the syllabus. It is a common scale for all syllabuses to show whether the candidate's performance is close to the top, bottom or middle of the grade."*	Qualitative	Presentation document: Statement of results Doc: [04_pres_Statement_of_Results]
Directions for scoring procedure and keys		
Marking is one of the 'Core Processes', identified and monitored through the quality management system (QMS), which is ISO 9001 certified. There is comprehensive procedural documentation covering operational activities, as well as detailed audit trails of decision making and actions.	Procedural	Operational document: CP06 – Marking and grading Doc: [05_proc_CP06]
There is comprehensive procedural documentation for internal staff involved in scoring candidate responses, including monitoring aspects of quality.	Procedural	Operational document: Assessment Staff Manual Chapter 5 – Marking by UK panels Doc: [06_proc_ASM_Chapter_05] Operational document: Assessment Staff Manual Chapter 12 – On-screen marking Doc: [07_proc_ASM_Chapter_12] *See also, in "Rationale for the particular cut-score recommended":* Presentation document: Scoring Cambridge IGCSE assessments Doc: [49_pres_Scoring Cambridge IGCSE] • pp.4-9
Once candidates have taken the exam and this evidence is available, the 'marking standardisation' process takes place. This includes: a review of the question paper to check it has functioned as intended; an update of the mark scheme as necessary in light of candidate responses; training for Examiners about how to apply the mark scheme; and testing of Examiners through qualifying scripts.	Procedural	Operational document: Instructions for Standardisation Team Members May/Jun 2022 Doc: [08_proc_STM_User_Guide_May_Jun_23] • pp.20–30
Once approved to mark, the accuracy and consistency of Examiners' marking is monitored by supervising Examiners. This includes: spot-checking and back-reading of a sample of live scripts; statistical monitoring of the consistency and accuracy of marking though analysis of performance on validation scripts. Where issues are identified, corrective action is taken.	Procedural	Operational document: Instructions for Standardisation Team Members May/Jun 2022 Doc: [08_proc_STM_User_Guide_May_Jun_23] • pp.31–35 *See also "Scorer reliability for essay items"*
There are well established and documented procedures for detecting and dealing with cases of malpractice and maladministration; this can lead to results being delayed, not issued, or withdrawn.	Procedural	Policy document: Cambridge Handbook 2024 • §5.6 Web: cambridgeinternational.org/.../700835-cambridge-handbook-2024

Narrative point ~ Evidence detail	Evidence type	Evidence source
Candidate scripts very close to a cut score (generally within 1%) are subject to Grade Review, where candidate responses are re-marked. *"The task of the grade review will be to re-mark the scripts of candidates at greatest risk of receiving an inappropriate syllabus grade. We will re-mark a candidate's work at grade review if they are close to a grade threshold (at syllabus level) and also at risk for at least one other reason."* (p.4)	Procedural	Operational document: Assessment Staff Manual Chapter 8 – Grade Review Doc: [09_proc_ASM_Chapter_08]
Centres can submit enquires about results where they believe an error has been made. This is the first stage of the wider appeals process.	Procedural	Policy document: Cambridge Handbook 2024 • §6.3 Web: cambridgeinternational.org/.../700835-cambridge-handbook-2024
Item/Test Content Development		
Specifications that define the domain(s) of content, skills, and abilities that the test samples		
Cambridge follows an integrated model of education, where curriculum, teaching, instruction and assessment are closely aligned.	Qualitative	Online information: An international education from Cambridge Web: cambridgeinternational.org/.../417448-overview-brochure
There are clear, principled expectations, as well as comprehensive procedural documentation, for syllabus development.	Procedural	Policy document: Cambridge International Code of Practice • §1 – Syllabuses Web: cambridgeinternational.org/.../416992-code-of-practice Operational document: Assessment Staff Manual Chapter 2 – Syllabuses and Schemes of Assessment Doc: [10_proc_ASM_Chapter_02]
The central point of reference is the syllabus document, which clearly defines: (a) the aims and key concepts for the test (b) the content specification for the test • knowledge and skills • content areas (c) the outline of the test structure • scheme of assessment • assessment objectives (i.e. how the construct is broken down) • weighting of assessment objectives	Qualitative	Syllabus document: Cambridge International AS & A Level – Economics 9708 (version 2; for exams in 2023, 2024 and 2025) Web: cambridgeinternational.org/.../595463-2023-2025-syllabus *NB: This point applies equally to all syllabuses; syllabus documents for all syllabuses are provided in the Faculty packets.*
The way in which content is sampled and targeted is exemplified in specimen assessment materials and, once available, past papers. Candidates can have confidence in the format and expectations of the assessment.	Qualitative	Assessment/Support material: Specimen and past question papers – AS & A Level Economics 9708 Web: cambridgeinternational.org/.../9708/past-papers/ *NB: This point applies equally to all syllabuses; question papers for all syllabuses are provided in the Faculty packets.*
The precise detail of how candidate performance is judged is set out in the mark scheme, including how assessment objectives are targeted by different items.	Qualitative	Assessment/Support material: Specimen and past question papers – AS & A Level Classical Studies 9274 Web: cambridgeinternational.org/.../9274/past-papers/ *NB: This point applies equally to all syllabuses; mark schemes for all syllabuses are provided in the Faculty packets.*

Narrative point ~ Evidence detail	Evidence type	Evidence source
Summary of the job analysis research (if a non-academic test)		
N/A – Cambridge International AS & A Levels are conventional academic tests		
Statement of test's emphasis on each of the content, skills, and ability areas		
The Assessment Objectives section in each syllabus describes the weighting each objective contributes to the assessment and details the subject content (knowledge, understanding and skills) that are sampled across each assessment.		*See "Specifications that define the domain(s) of content, skills, and abilities that the test samples"*
There is comprehensive setting guidance for each syllabus and/or component, and documentation to record how assessments meet targets for content sampling and demand. This contributes significantly to internal consistency between forms and across time.	Psychometric	Technical document: Paper Setting Guidelines – IGCSE Biology, Paper 3/4, 2018 Doc: [11_0610_P4_paper_setter_guidelines] Technical document: Chair's guidance document – IGCSE Biology, Paper 1/2, 2021 Doc: [12_0610_P2_chair's guidance] *NB: Technical documents are provided here to illustrate Cambridge's processes; further examples are available on request.*
Rationale for the kinds of tasks (items) that make up the test		
Cambridge uses multiple choice items in subjects with significant 'factual content'. This type of item allows for a large amount of subject content to be tested. Objective/selected response items are tagged for content standard, assessment objective (broad skill area), and intended level of demand. Content sampling and demand are built into the test structure, as stated in the syllabus document and exemplified in Specimen Assessment Materials, and are managed through Specification Sheets and Attribute Reports.	Psychometric	Technical document: MCQ setting grid – IGCSE Biology, Paper 22, Jun'21 Doc: [13_0610_22_Jun21_setting_grid] Technical document: Attribute report – IGCSE Biology, Paper 22, Jun'21 Doc: [14_0610_42_Jun21_attribute_report] *NB: Technical documents are provided here to illustrate Cambridge's processes; further examples are available on request.*
Cambridge uses points-based free-response items in the vast majority of assessments. This type of item allows knowledge, understanding and skills to be tested thoroughly, often though questions that require students to work through multiple steps, targeting a range of content standards. Points-based items are tagged for content standard, assessment objective (broad skill area), intended level of demand and, in some cases, item tariff. Content sampling and demand are built into the test structure as stated in the syllabus document and exemplified in Specimen Assessment Materials, and are managed through Specification Sheets	Psychometric	Technical document: Setting grid – IGCSE Biology, Paper 42, Jun'21 Doc: [15_0610_42_Jun21_setting_grid] *NB: Technical documents are provided here to illustrate Cambridge's processes; further examples are available on request.*
Cambridge uses levels-based free-response items widely in its assessments. These items allow a wide range of knowledge, understanding and skills to be tested within one question. In some cases, a single item (or task) will assess all content – knowledge *and* skills – for a substantial section of the course. For levels-based items, content sampling, demand and expectations around performance standards are built into the mark schemes (scoring rubrics)	Psychometric	Assessment/Support material: Mark scheme – AS & A Level Classical Studies 9274, Paper 1, Specimen for 2022 onwards Doc: [16_9274_P1_Specimen_mark_scheme] AS & A Level Design & Technology 9705, Paper 12, Jun'23 Doc: [17_9705_12_Jun23_mark_scheme] *NB: These are examples to illustrate the narrative point; mark schemes for all syllabuses are provided in the Faculty packets.*
Item development and assessment processes support accuracy and consistency of scores for items requiring a high degree of expert judgement. Level-based mark schemes (scoring rubrics) follow clearly articulated design principles, which supports both their design and their application. Scorers undergo comprehensive training, and their performance is assessed before they begin scoring live candidate work (though qualifying scripts) and throughout their allocation of scripts (validation scripts and spot-checking).	Procedural	Operational document: Mark Scheme Design Principles – Levels-based mark schemes Doc: [18_proc_Mark Scheme Design Principles] *See also "Scorer reliability for essay items"*

Narrative point ~ Evidence detail	Evidence type	Evidence source
Information about the adequacy of the items on the test as a sample from the domain(s)		
Item writers record information concerning coverage and intended demand/difficulty for the items for each test paper. This information is reviewed and confirmed throughout the item/test development process.	Psychometric	Technical document: MCQ setting grid – IGCSE Biology, Paper 22, Jun'21 Doc: [13_0610_22_Jun21_setting_grid] Technical document: Setting grid – IGCSE Biology, Paper 42, Jun'21 Doc: [15_0610_42_Jun21_setting_grid] *NB: Technical documents are provided here to illustrate Cambridge's processes; further examples are available on request.*
Information on the currency and representativeness of the test's items		
N/A – Cambridge International AS & A Levels are conventional academic tests		
Description of the item sensitivity panel review		
Test development is one of the 'Core Processes', identified and monitored through the quality management system (QMS), which is ISO 9001 certified. There is comprehensive procedural documentation covering operational activities, as well as detailed audit trails of decision making and actions.	Procedural	Operational document: CP03 – Development of assessment materials Doc: [19_proc_CP03]
The Question Paper Evaluation Committee (QPEC) meeting is a key quality control activity. All items are considered by a group of subject matter experts (SMEs) before a test form is approved for use.	Procedural	Operational document: Assessment Staff Manual Chapter 3a – Question Papers and Mark Schemes • §§3a.13.6-8 – summarizes the QPEC review Doc: [20_proc_ASM_Chapter_03a] Operational document: QPEC agenda Doc: [21_proc_QPEC_agenda_template]
Cambridge AS & A Level programs are followed across the world and the use of accessible, clear English is essential. Cambridge has developed a set of accessible language principles, which are referenced in procedural documentation for test development and production. These principles are applied both by individuals, e.g., the Reviser, and by the Question Paper Evaluation Committee (QPEC).		Operational document: Accessible language principles Doc: [22_proc_Accessible language principles for Assessment] Operational document: Instructions for Revisers Doc: [23_proc_Instructions_for_Revisers]
Whether and/or how the items pre-tested (field tested) before inclusion in the final form		
Cambridge follows a "review and award" methodology, with new forms and items created for each examination series. Furthermore, many tests make use of high-tariff free-response items. For these reasons, it is not practicable to systematically pre-test or field test items. The Question paper Evaluation Committee (QPEC) allows for thorough evaluation of test items and the test form as a whole. In practice, this serves a similar purpose to 'field testing'.		*See "Description of the item sensitivity panel review"*

Narrative point ~ Evidence detail	Evidence type	Evidence source
Item analysis results (e.g. item difficulty, discrimination, item fit statistics, correlation with external criteria)		
Items are expected to function within acceptable parameters (e.g. difficulty, discrimination, targeting, etc.) that are a central consideration when developing schemes of assessment, and when authoring and evaluating items during test development.	Procedural	Operational document: A guide to using ILD for setting and QPECs Doc: [24_proc_Guide To Using ILD]
Detailed item statistic reports are generated routinely to analyse and evaluate item functioning. These follow a Classical Test Theory approach. The reports are generated before cut-scores are set ('ILD for Awarding'), and after ('Post award ILD'), with slightly different information reported. *Test level information:* • *N of questions and of items* • *Cronbach's Alpha / Backhouse's P* • *Sum. stats – all candidates: N, mean, SD, min, max* • *Sum. stats – by quartile: N, mean, SD, min, max* • *Mark/frequency distribution* • *Grade distribution – all cands. and by gender* *Question/item level information:* • *Sum. stats – all candidates: tariff, omit, fac., discr.* • *Sum. stats – by quartile: facility* • *Sum. stats – by grade and/or gender: facility* • *Mark/frequency distribution*	Psychometric	Technical document: ILD for Awarding – AS & A Level Information Technology, Paper 12, Jun'23 Doc: [25_9626_12_ILDforAwarding_June2023] AS & A Level Economics, Paper 22, Jun'23 Doc: [26_9708_22_ILDforAwarding_June2023] Technical document: Post award ILD – AS & A Level Information Technology, Paper 12, Jun'23 Doc: [27_9626_12_PostAwardILD_June2023] AS & A Level Economics, Paper 22, Jun'23 Doc: [28_9708_22_PostAwardILD_June2023] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
Item statistic and distractor analysis reports are generated routinely for papers composed of multiple choice items. *Test level information:* • *N of items* • *Summary stats – N, mean, SD, min, max* • *Cronbach's Alpha* • *Standard Error of Measurement* • *Test stats (mean) – P, Item-Tot., Biserial* • *Mark/frequency distribution* *Item level information:* • *Item stats – P, Discrimination, Point Biserial* • *Distractor analysis – P_{tot}, P_{high}, P_{low}, Point Biserial*	Psychometric	Technical document: Statistical Analysis report – AS & A Level Economics, Paper 12, Jun'23 Doc: [29_9708_12_iteman_June2023] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
As part of ongoing process improvement, Cambridge is developing an enhanced technical report to support the evaluation of test forms. These reports provide further detail around discrimination and difficulty for candidates through the ability range. Note: These reports are not for live use, but are useful for illustrative purposes. They are taken from the June 2022 examination series.	Psychometric	Technical document: Enhanced ILD – AS & A Level Travel & Tourism, Paper 11, Jun'22 Doc: [30_9395_11_Enhanced_ILD_Jun22] AS & A Level Physics, Paper 22, Jun'22 Doc: [31_9702_22_Enhanced_ILD_Jun22] A Level Geography, Paper 31, Jun'22 Doc: [32_9696_31_Enhanced_ILD_Jun22]
Principal Examiner reports analyze student performance and errors on all test papers in every exam series. They identify common misunderstandings or mistakes, as well as strengths of understanding and skills, that students demonstrate on each assessment.	Qualitative	Assessment/Support material: Principal Examiner report – AS & A Level Economics, Jun'23 Doc: [33_9708_examiner_report_Jun23] *NB: This point applies equally to all syllabuses; Principal Examiner reports for all syllabuses are provided in the Faculty packets.*

Narrative point ~ Evidence detail	Evidence type	Evidence source
Reliability Information		
Internal consistency reliability		
Detailed statistical reports are generated routinely to analyse and evaluate reliability. These follow a Classical Test Theory approach. The reports are generated after cut-score have been set. • *N of candidates* • *N of items and of compulsory items* • *Total mark* • *Mean mark – absolute and %age* • *SD – absolute and %age* • *Cronbach's Alpha / Backhouse's P* • *Standard Error of Measurement* • *N of grades and average grade bandwidth – absolute and %age* • *Average grade bandwidth-to-SEM ratio* • *Comparison: reliability against N of items – given an acceptable parameter; relative to other assessments*	Psychometric	Technical document: Component Reliability report – AS & A Level Information Technology, Paper 12, Jun'23 Doc: [34_9626_12_Reliability_June2023] AS & A Level Economics, Paper 22, Jun'23 Doc: [35_9708_22_Reliability_June2023] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
For papers composed of multiple choice items, the Statistical Analysis report includes statistics to analyse and evaluate reliability. These follow a Classical Test Theory approach. The reports are generated after cut-score have been set. • *N of items* • *Summary statistics – N, mean, SD, min, max* • *Cronbach's Alpha* • *Standard Error of Measurement* • *Test statistics (mean) – P, Item-Tot., Biserial*	Psychometric	Technical document: Statistical Analysis report – AS & A Level Economics, Paper 12, Jun'23 Doc: [29_9708_12_iteman_June2023] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
During standard setting and evaluation, correlation between papers within a syllabus can be analysed, including: • *N of common candidates* • *Pearson correlation coefficient*	Psychometric	Technical document: Unit pair distribution – AS Level Economics, Paper 12 ~ Paper 22, Jun'23 Doc: [36_9708_UnitPairs_12_22_Jun23] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
Evidence for equivalence of forms of the test		
New forms are created for each examination series, and almost all items are developed specifically for each new form. This protects items from over-exposure. The grading process focuses on maintaining awarding standards from year to year.	Procedural	Policy document: Cambridge International Code of Practice • §4 – Grading and the reporting of results Web: cambridgeinternational.org/.../416992-code-of-practice
Cambridge administers multiple forms internationally, with specific forms for individual countries or regions; this is to ensure high levels of test security and integrity. In the US, a single form of each test is used.	Procedural	Policy document: Cambridge Handbook 2024 • §1.2 – Preparing your exams timetable Web: cambridgeinternational.org/.../700835-cambridge-handbook-2024
Equivalence between test forms is assured through the item/test development and grading processes. There is comprehensive setting guidance for each syllabus and/or component, and documentation to record how assessments meet targets for content sampling and demand. Cambridge International makes clear its commitment to maintaining awarding standards from year to year through the grading process. These activities contribute significantly to internal consistency between forms and across time.		*See "Statement of test's emphasis on each of the content, skills, and ability areas" (i.e. item/test development)* *See "Rationale for the particular cut-score recommended" (i.e. standard setting)*

Narrative point ~ Evidence detail	Evidence type	Evidence source
Scorer reliability for essay items		
Cambridge follows a "review and award" methodology, with most assessments requiring expert judgement for accurate and reliable scoring. *"Awarding-based assessments: design – review – administration – outcomes – awarding – endorsement* *This can be characterised as a 'review and award' model. […] Internal quality assurance processes operate on marking and awarding, using data derived from the awarding session, previous sessions and other bodies of data such as prior attainment of candidates."* (p.7)	Qualitative	Policy document: The Cambridge Approach Web: cambridgeassessment.org.uk/.../cambridge-approach-to-assessment
Mark schemes include comprehensive instructions at a level of detail that allows for consistent replication, including: • generic marking instructions • detailed performance descriptors at each level • exemplar responses and or indicative content	Qualitative	Assessment/Support material: Mark scheme – AS & A Level Classical Studies 9274, Paper 1, Specimen for 2022 onwards Doc: [16_9274_P1_Specimen_mark_scheme] AS & A Level Design & Technology 9705, Paper 12, Jun'23 Doc: [17_9705_12_Jun23_mark_scheme] *NB: This point applies equally to all syllabuses; mark schemes for all syllabuses are provided in the Faculty packets.*
In order to be approved for live scoring, Examiners must complete a set of qualifying scripts, which are reviewed by a senior examiner. During live marking, Examiners are monitored by senior examiners, including spot-checking. Where issues are identified, corrective action is taken.		*See "Directions for scoring procedure and keys"* *See also, in "Rationale for the particular cut-score recommended":* Presentation document: Scoring Cambridge IGCSE assessments Doc: [49_pres_Scoring Cambridge IGCSE]
A range of statistical monitoring techniques are employed to monitor the consistency and accuracy of marking, measuring differences between examiner marks and definitive marks on validation scripts. Where issues are identified, corrective action is taken. Two metrics are used to monitor scorers: • Paper Difference (sum of item differences) • Paper Deviation (sum of absolute item differences)	Psychometric	Presentation document: Marker Monitoring analysis – AS Level Biology, Paper 22, Jun'19 Doc: [37_pres_Biology_P22_examiner_scoring_stats] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
After the series, validation script data can be analyzed. The summary of examiner agreement on validation scripts can be used to evaluate the suitability of specific scripts and validation scripts, and by extension, the wider scorer monitoring process for a given assessment.	Psychometric	Technical document: Component Reliability report (Marking) – AS Level Biology, Paper 22, Jun'19 Doc: [38_9700_22_Reliability_June2019_Marking] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
Cambridge conducts on-going research to maximize marker agreement and reliability; examples include: Mark scheme features associated with different levels of marker agreement (Bramley, T. 2008) The interrelations of features of questions, mark schemes and examinee responses and their impact upon marker agreement (Suto, I., Bramley, T. and Black, B. 2010) An experimental investigation of the effects of mark scheme features on marking reliability (Child, S., Munro, J. and Benton, T. 2015) The effect of adaptivity on the reliability coefficient in comparative judgement (Vitello, S. and Bramley, T. 2017) Investigating the reliability of Adaptive Comparative Judgment (Bramley, T. 2015)	Qualitative – research	Cambridge Assessment research papers available at: Web: cambridgeassessment.org.uk/.../109770-mark-scheme-features-associated-with-different-levels-of-marker-agreement Web: cambridgeassessment.org.uk/.../111943-the-interrelations-of-features-of-questions-mark-schemes-and-examinee-responses-and-their-impact-on-marker-agreement Web: cambridgeassessment.org.uk/.../417277-an-experimental-investigation-of-the-effects-of-mark-scheme-features-on-marking-reliability Web: cambridgeassessment.org.uk/.../423984-the-effect-of-adaptivity-on-the-reliability-coefficient-in-comparative-judgement Web: cambridgeassessment.org.uk/.../232694-investigating-the-reliability-of-adaptive-comparative-judgment

Narrative point ~ Evidence detail	Evidence type	Evidence source
Errors of classification percentage for the minimum score for granting college credit (cut score)		
Results are reported as grades, giving wide classification categories. Grade bandwidth-to-SEM ratio is calculated at component level to monitor the risk of grade misclassification. The statistics calculated include: • *Standard Error of Measurement* • *N of grades and average grade bandwidth – abs. and %age* • *Average grade bandwidth-to-SEM ratio* Note that candidates can appeal scores and grades if they feel they are unfair or unrepresentative.	Psychometric	Technical document: Component Reliability report – AS & A Level Information Technology, Paper 12, Jun'23 Doc: [34_9626_12_Reliability_June2023] *See also "Internal consistency reliability"* *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
Validity Information		
Content-related validity		
Overall validity of AS & A Level qualifications The research report *Benchmarking Cambridge International* shows that: • Cambridge assessments access higher-order thinking skills • Cambridge assessment methods require candidates to demonstrate the necessary knowledge and skills identified as learning or assessment objectives • Cambridge courses provided solid preparation for higher education	Qualitative – research	Research paper: Benchmarking Cambridge International (UK NARIC, 2016) Doc: [39_Report_ Benchmarking Cambridge International] In particular: • Assessment Objectives, page 18 • Overarching Observations on the Cambridge International AS & A Level, page 22
Validity in terms of content and standards The research paper *Comparison of the AICE, AP and IB specifications and written assessments* shows that Cambridge courses cover similar content at a similar or higher level of cognitive demand as advanced IB and AP courses.	Qualitative – research	Cambridge Assessment research paper: Comparison of the AICE, AP and IB specifications and written assessments (Rushton, N., Darlington, E. and Constantinou, F. 2016) Doc: [40_Report_AICE AP IB comparisons]
Validity argument – AS & A Level Physics The Cambridge Assessment publication *An approach to validation: Developing and applying an approach for the validation of general qualifications* represents a detailed investigation of this syllabus within the context of a rigorously developed framework found strong support for claims for validity.	Qualitative – research	Cambridge Assessment research paper: An approach to validation: Developing and applying an approach for the validation of general qualifications (Shaw, S. and Crisp, V. 2020) Doc: [41_Report_research-matters-special-issue-3]
Criterion-related validity		
Impact of Cambridge AS & A Level qualifications The research paper *Assessing the Impact of the Cambridge International Acceleration Program on U.S. University Determinants of Success* shows that the benefits of Cambridge participation are statistically similar to those of other accelerator programs (IB and AP).	Qualitative – research	Research paper: Assessing the Impact of the Cambridge International Acceleration Program on U.S. University Determinants of Success (Shaw, S., Warren, J. and Gill, T. 2014) Doc: [42_Report_US Impact CUJ]
Comparison of Cambridge AS & A Level qualifications with other accelerator programs The research paper *Higher education performance of Cambridge students in the United States* considers how Cambridge qualifications compare with other courses.	Qualitative – research	Cambridge Assessment research paper: Higher education performance of Cambridge students in the United States: A case study comparing qualification levels (Pastorino, C. 2021) Doc: [43_Report_PerformanceHE_US_AvsAS]
Construct validity (if appropriate)		
After each series, the Principal Examiner for a component produces a detailed report. These reports summarize student performance on every test paper, and show that items elicit the intended response processes.	Qualitative	Assessment/Support material: Principal Examiner report – AS & A Level Economics, Jun'23 Doc: [33_9708_examiner_report_Jun23] *NB: This point applies equally to all syllabuses; Principal Examiner reports for all syllabuses are provided in the Faculty packets.*

Narrative point ~ Evidence detail	Evidence type	Evidence source
Correlations between candidate performance on the different components that make up the syllabus show strong relationships between papers (i.e. there are common underlying constructs), while allowing for the focus on distinct skills across the papers.	Psychometric	Presentation document: Inter-component correlations – AS Level Biology, Jun'19 Doc: [44_SG_Biology inter component correlations] *NB: This presentation document provides evidence to illustrate typical performance for a sample of Cambridge tests; further information is available on request.*
Possible test bias of the total test score		
Cambridge International sets out commitments Candidates will be treated fairly in all circumstances.	Procedural	Policy document: Cambridge International Code of Practice • §5 – Maintaining the integrity and currency value of examination results Web: cambridgeinternational.org/.../416992-code-of-practice
Reasonable and appropriate steps are taken to ensure that tests are accessible and fair (unbiased) across student groups. Fairness and accessibility are considered, evaluated and confirmed throughout course and exam development and review. Examples of issues for which explicit guidance is provided include: • Social and Cultural Considerations and Sensitive Topics • Anglo-centric Bias and National Sensitivities • Command Words • Problematic Command Words • Language Guidance for Question Setters	Procedural	Operational document: Instructions for Revisers Doc: [23_proc_Instructions_for_Revisers]
Finalised (post-grading) item statistics give facility by score category (grade) by gender: • *Test level: grade distribution, for all candidates and by gender* • *Question/item level: summary statistics (facility), by grade and/or gender*	Psychometric	Technical document: Post award ILD – AS & A Level Economics, Paper 22, Jun'23 Doc: [28_9708_22_PostAwardILD_June2023] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
Cambridge conducts analyses of assessment data to identify potential bias. The research paper *Success in the US* summarizes analyses comparing the college outcomes of Cambridge participants across gender and ethnicity.	Qualitative – research	Research paper: Success in the US (Shaw, S. and Bailey, C. 2011) Doc: [45_Report_Success in the US_final]
Evidence that time limits are appropriate and that the exam is not unduly speeded		
Omit rates are generally low and do not show a trend of being higher at the end of the test; this is evidence of acceptable item functioning.	Psychometric	Technical document: ILD for Awarding – AS & A Level Information Technology, Paper 12, Jun'23 Doc: [25_9626_12_ILDforAwarding_June2023] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes and/or typical performance of Cambridge tests; further examples are available on request.*
Provisions for standardizing administration of the examination		
Test administration procedures for all course exams are comprehensively and clearly documented, with detailed guidance to support schools. This includes guidance and regulations on: • Standardized test preparation instructions • Standardized test administration procedures • Consequences of breaching test administration regulations have consequences • Special instructions for particular exams	Procedural	Policy document: Cambridge Handbook 2024 Web: cambridgeinternational.org/.../700835-cambridge-handbook-2024

Narrative point ~ Evidence detail	Evidence type	Evidence source
There is comprehensive guidance and procedure around access accommodations for candidates published on the Cambridge International website. Statement: *"Access arrangements are pre-exam arrangements made on behalf of a candidate with particular needs, for example the use of a scribe, modified papers or extra time."*	Procedural	Online information: Access arrangements Web: cambridgeinternational.org/.../access-arrangements/

Provisions for exam security

Cambridge implements numerous policies and procedures to ensure security while developing secure test materials.	Procedural	Policy document: Cambridge International Code of Practice • §5.3 – ten commitments to maintain the security and integrity of Cambridge exams Web: cambridgeinternational.org/.../416992-code-of-practice
Cambridge's approach to test security, preventing irregularities in assessment, and maintaining test integrity is clearly set out.	Procedural	Policy document: Cambridge Handbook 2024 • §4: Before the exams (especially §4.2–§4.6) • §5: Exam day (especially §5.1–§5.3; §5.7) • §5.6: Malpractice Web: cambridgeinternational.org/.../700835-cambridge-handbook-2024

Cut-Score Information

Rationale for the particular cut-score recommended

Cambridge International makes clear its commitment to maintaining awarding standards from year to year through the grading process. This activity contributes significantly to internal consistency between forms and across time. Statement: *"Aim 4.3: Grading will maintain the awarding standard of the previous year's examination and comparability with other options and qualifications."* (p.18) *"The awarding standard is the standard of candidate performance that is just sufficient for the award of a particular grade."* (p.18)	Procedural	Policy document: Cambridge International Code of Practice • §4 – Grading and the reporting of results Web: cambridgeinternational.org/.../416992-code-of-practice
Grading is one of the 'Core Processes', identified and monitored through the quality management system (QMS), which is ISO 9001 certified. There is comprehensive procedural documentation covering operational activities, as well as detailed audit trails of decision making and actions.	Procedural	Operational document: CP06 – Marking and grading Doc: [05_proc_CP06]
There is comprehensive procedural documentation for internal staff involved in grading activity. A staff briefing is held in advance of every examination series to provide guidance on matters pertaining to the series in question.	Procedural	Operational document: Assessment Staff Manual Chapter 7a – Grading Doc: [47_proc_ASM_Chapter_07a]
The aim of grading is to ensure the equivalence of test forms over time (carrying forwards the awarding standard from the previous year) and between variants (ensuring comparability around the world). Statement: *"The purpose of the grading process is to determine, for each key threshold on each component and each syllabus option, what is the lowest mark for which the performance this year can be deemed equivalent to that achieved by candidates at the lowest mark for the same grade last year."* (p.6)	Procedural	Operational document: Assessment Staff Manual Chapter 7a – Grading Doc: [47_proc_ASM_Chapter_07a]

Narrative point ~ Evidence detail	Evidence type	Evidence source
Grading decisions focus on balancing evidence of cohort ability (outcomes) and test difficulty (thresholds), making use of "multiple sources of evidence", including a range of technical and statistical data, alongside input from subject matter experts. Statement: *"Cambridge International's grading decisions are made using a combination of professional judgement and the technical and statistical evidence."* (p.6)	Procedural	Operational document: Assessment Staff Manual Chapter 7a – Grading Doc: [47_proc_ASM_Chapter_07a]
The process for setting cut-scores for each syllabus is comprehensively recorded, presenting the evidence used and rationales for all decisions.	Psychometric	Technical document: Grading Plan – AS Level Biology, Jun'19 Doc: [48_9700_GradingPlan_Jun2019---SENSITIVE] *NB: Technical documents are provided for a sample of syllabuses to illustrate Cambridge's processes; further examples are available on request.*
A wide range of sources of technical and statistical data are generated and analysed to support the cut-score setting process – both during decision making and subsequent quality assurance. The analyses that inform the final rationale for proposed cut-scores include: Comparisons between series and between variants – focus on test difficulty • Threshold comparison tool – Historic paper and syllabus thresholds presented in tables and graphs Comparisons between subjects – focus on test difficulty • Syllabus pairs analysis – Score achieved on different subject tests by common candidates Comparisons between 'first half' and 'second half' of advanced courses – focus on test difficulty *NB: AS Levels are the 'first half' of an A Level course* • AS to A Level progression analysis – Outcomes by score/grade for AS Level component and A Level overall Comparison of cohort size over time – focus on cohort ability and likely stability • Entries analysis tool – Counts of cohort size overall and by subgroups Comparison of cohort size and make-up (by country) over time – focus on cohort ability • Cohort mix analysis Comparison of projected grades (by teachers) over time – focus on cohort ability • Forecast grade analysis Consideration of test statistics, historic thresholds and outcomes by series – focus on general test functioning • Tables of historic data – summary statistics, cut-scores and outcomes • Tables presenting summary statistics for current series Consideration of likely thresholds to maintain outcomes based on stable continuing cohort – focus on statistical standards • Benchmark Basket Threshold Indicator analysis – based on 'stable common centres' • Returning Centre Threshold Indicator analysis – based on centres with entries in previous series • Putative outcomes analysis – based on prior attainment for 'matched candidates'	Psychometric	Presentation document: Scoring Cambridge IGCSE assessments Doc: [49_pres_Scoring Cambridge IGCSE] • pp.18-21

Narrative point ~ Evidence detail	Evidence type	Evidence source
Evidence for the reasonableness and appropriateness of the cut-score recommended		
A brief rationale for the recommended cut-scores for every assessment is presented to Cambridge International's Accountable Officer for their endorsement. The focus is on appropriate use of evidence and decision making.	Psychometric	Presentation document: Grading confirmation comments [sample; redacted] Doc: [50_pres_Phase_1_comments_Jun_19---SENSITIVE] *NB: This presentation document provides evidence for a sample of syllabuses to illustrate Cambridge's processes; further information is available on request.*
Trends in outcomes (percentage achieving at each cut-score) for every assessment are reviewed by the Accountable Officer and senior colleagues. The focus is on the maintenance of standards over time.	Psychometric	Presentation document: Qualification Statistics report [sample; redacted] Doc: [51_pres_qualstats_Jun19---SENSITIVE] *NB: This presentation document provides evidence for a sample of syllabuses to illustrate Cambridge's processes; further information is available on request.*
Procedures recommended to users for establishing their own cut scores (e.g. granting college credit)		
Cambridge publishes whole-world outcomes by grade for each syllabus, which gives currency to the grades achieved by individual candidates.	Psychometric	Technical document: Cambridge International AS and A Level results statistics Web: cambridgeinternational.org/.../results-statistics/
Cambridge publishes cut-scores and scoring rubrics, which together, and in combination with other published resources, demonstrate the level of performance required at each grade.	Qualitative	Technical document: Grade threshold tables Web: cambridgeinternational.org/.../grade-threshold-tables/ Assessment/Support material: Mark scheme – AS & A Level Classical Studies 9274, Paper 1, Specimen for 2022 onwards Doc: [16_9274_P1_Specimen_mark_scheme] *NB: This point applies equally to all syllabuses; assessment materials and grade thresholds for all syllabuses are provided in the Faculty packets.*
Through the School Support hub, Cambridge publishes Example Candidate Responses, which demonstrate in concrete terms the level of performance typically required at given score points.	Qualitative	Assessment/Support material: Example candidate responses – AS & A Level History, Paper 2 Doc: [52_9489_P2_Example_Candidate_Responses] *NB: This point applies equally to all syllabuses; example candidate responses for all syllabuses are provided in the Faculty packets.*
Information on norms and normative groups (if applicable)		
Cambridge does not use norms.		
Statistical standards are considered as part of the process of carrying forward awarding standards from year to year.		*See "Rationale for the particular cut-score recommended"*
Recommended Items		
Effects of different content samples		
Cambridge tests focus on consistent content sampling of the syllabus from series to series, considering Assessment Objectives, targeting levels of difficulty, and systematically drawing upon areas of content.		*See "Evidence for equivalence of forms of the test"*

Narrative point ~ Evidence detail	Evidence type	Evidence source
Effects of testing on different occasions		
Standard setting focuses on maintaining awarding standards from year to year, also considering standards between sessions (March, June, November); centres choose which session to enter based on their delivery model.		*See "Rationale for the particular cut-score recommended"*
Equivalence of forms		
Cambridge International makes clear its commitment to maintaining awarding standards from year to year through the grading process.		*See "Evidence for equivalence of forms of the test"*
Score stability over time		
Cambridge International makes clear its commitment to maintaining awarding standards from year to year through the grading process.		*See "Rationale for the particular cut-score recommended*
Irrelevant sources of difficulty affecting test scores		
Cambridge exams are designed to minimize construct irrelevant variance.	Procedural	Policy document: Cambridge International Code of Practice • §2.4: Question papers and mark schemes will minimize construct-irrelevant variance Web: cambridgeinternational.org/.../416992-code-of-practice
Cambridge provides comprehensive guidance for those involved in test development. Instructions for Revisers and Vetters, who carry out quality assurance activities, include: • Language guidance • Managing the content of mark scheme	Procedural	Operational document: Instructions for Revisers Doc: [23_proc_Instructions_for_Revisers] Operational document: Instructions for Vetters Doc: [53_proc_Instructions_for_Vetters] *See "Description of the item sensitivity panel review"*

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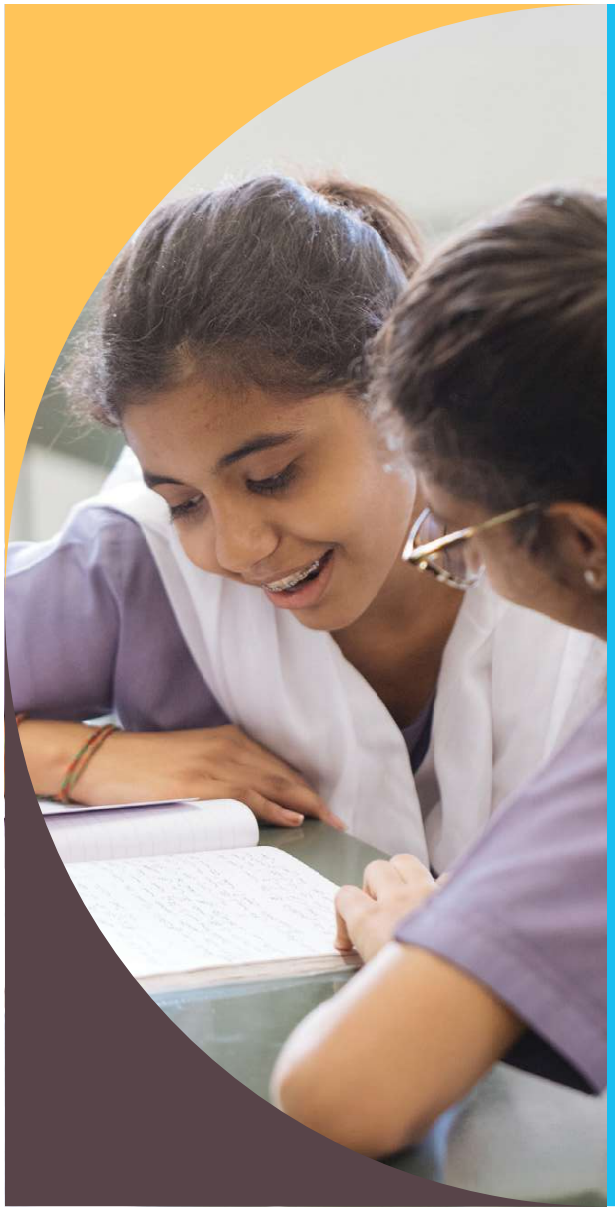

Developing your school with Cambridge

A guide for school leaders

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Foreword

A key and consistent finding from international research into educational effectiveness is that pupil achievement, broadly defined, is influenced most by classroom-level activity and by what teachers do in classrooms (see Muijs et al 2014). Unfortunately the practical realities of running a school can mean that not enough attention is paid to the classroom level. School administrators and leaders can spend most of their time on operational and administrative matters. This guide focuses on classroom-level activity, providing support and guidance to Cambridge schools that want to improve the quality of teaching and learning.

There are many effective approaches to teaching Cambridge programmes. No two schools are identical, even in a common culture, let alone in an environment as rich and diverse as the Cambridge community. How you prioritise the principles and practices identified in this guide, and how you implement them, will vary considerably. This will depend on the culture and values of your school as well as the level of the school's development. Effective educational practice is the result of local ownership and leadership. It must involve careful management of the large number of inter-dependent variables that contribute to it. Only you know your school and its community, and only you can drive school improvement. Cambridge International's role is to support you, to help you make the right decisions for your school.

I hope this guide will prove useful to school leaders as a resource to help evaluate and then develop practice. I also hope you will be inspired to become active within our community of schools. One of the implicit themes throughout this guide is that no individual teacher, school leader or school should ever work in isolation. We all improve our professional practice with critical and supportive friendship.

Dr Tristian Stobie
Director of Education, Cambridge Assessment International Education



1: Introduction

1.1 Audience, aim, purpose and focus of the guide

Many books and articles have been written about improvement in schools and school systems over the past two decades. This has been a period of intense international interest in educational quality and standards. Today, we are in a position where there is a wealth of theory and research evidence about what makes an effective school and a quality education. This material is not always easily available to school leaders and teachers in a practical and coherent form. This Cambridge guide is designed to meet this need for schools that:

- provide one or more of the Cambridge curriculum programmes for their learners
- aspire to achieve a high standard of education for these learners
- are committed to the ongoing process of school development.

This guide will help school leaders and teachers to understand, and put into practice in their own context, some of the important lessons learned from international work on raising quality standards and improving educational outcomes. It is designed to complement other Cambridge resources for school leaders and teachers including *Implementing the Curriculum with Cambridge* and *Developing the Cambridge Learner Attributes* . Find them at **www.cambridgeinternational.org.uk/teaching-and-learning**

The primary audience for the guide is schools that are newly registered with Cambridge International. Providing one or more Cambridge programmes often involves significant transformation, with new and different approaches. The guide supports the development work that schools will already have undertaken to register with Cambridge International and to plan for introducing one or more Cambridge programmes. Newly registered schools are likely to be 'working towards' the achievement of at least some of the Cambridge standards, which is recognised in the registration process. The development work covered in the guide will enable the school to achieve these standards and then continue to develop to become an even better school.

The guide will also be of interest to schools going through the registration process, and to well-established schools that have achieved the Cambridge registration standards. School development is a journey, and one of the characteristics of outstanding schools and school systems is that they are always striving for further improvements.

The timescale of activity in the guide covers a period of 3–5 years. This will vary depending on what processes you have already put in place and the outcomes achieved in the school. As school development is a never-ending cycle of evaluation and improvement, the activities will relate closely to ongoing cycles of implementation, monitoring, review and revision well into the future.

The **aim** of the guide is to provide an introduction to school development that improves the delivery of Cambridge programmes and thereby supports student learning.

The **purpose** of the guide is to be a user-friendly and practical manual for Cambridge schools in a wide range of contexts. As well as providing some guidance about effective practice, it will also direct users to additional reading on key topics so that schools can access the research evidence directly. It will introduce, but not fully explore, further steps that more experienced schools could take towards achieving sustainable excellence.

The **focus** of the guide is on improving the quality of student learning. This includes:

- a classroom focus on the quality of learning for individual students
- a broader focus on improving the quality of student learning – through developing a school-wide culture of learning supported by a shared educational vision and the systems and processes necessary to achieve and sustain it.

1.2 Resources

This guide contains a limited selection of examples. We are developing further examples of criteria, policies, procedures, documents and approaches described in this guide. When available these resources will be published on our public website. It is very important to stress that these resources are provided to help your planning. You must develop your own procedures and practices in line with your school community's needs.

An annotated bibliography is provided at the end of the guide. Terms used in the guide are defined in the glossary section.

1.3 The challenge of professional and institutional change

Change is, by its nature, disruptive as it involves challenging traditional attitudes and practices to improve and broaden the range of professional skills. School development involves evaluating and refining existing practices and introducing new ones, all supported by professional learning. For teachers this is likely to include developing a broader range of effective teaching practices that support active learning. For school managers and leaders this might include developing new leadership styles and strategies. Introducing change is only the beginning of the process as effective change requires ongoing evaluation and development.

This guide provides some guidance to help schools design their own development plans. How change is managed will depend on the context and culture of the school. While research into school improvement has some generalisable findings, it is important to recognise that every school is unique, with its own context and culture. As Kamens (2013, p.130) points out:

"It should be clear that the search for 'best practices', is now an international one. With it come high expectations that there are easily borrowed protocols that can vastly improve local educational systems ... The search for best practice is built on an optimistic faith that 'a school is a school is a school.' It assumes that a practice that works in say Finland will work as well in the United States or Germany. It assumes Education is like Engineering."

The richness of the Cambridge community is its diversity, and we do not believe that education is like engineering. Every school has its own distinctive mission and community, and every class of learners its own character and needs. School development is also a gradual process. Planning needs to move incrementally through stages, recognising the current practical reality the school faces. This guide is not intended in any way to be prescriptive. School leaders and teachers will want to consider the ideas and practices presented here critically. They can then apply them in ways that fit their own unique context, circumstances and needs.

1.4 What are 'standards' in an education system supported by Cambridge International?

It is helpful to have a common understanding of what we mean by 'standards' in the context of Cambridge programmes, our international family of schools and the processes of school development. Standards are clear descriptions used to define quality expectations. In education they often refer to student achievement but they also relate to quality across the whole of a school's work and functions.

The international qualification standard

As we are a curriculum and assessment authority and awarding organisation, Cambridge standards relate to the prescribed syllabus and its assessment. Cambridge International can justifiably claim to set an international standard for its qualifications. At Cambridge Upper Secondary and Advanced levels our qualifications are widely recognised by higher education institutions, universities, employers and other stakeholders as excellent preparation for the next stage of education. Because these standards are international and portable, a student receiving a grade in one country at one time can accurately be compared to a student receiving the same grade at another time and place. Cambridge International is responsible for maintaining these standards and ensuring they are the same for all students in all Cambridge schools.

Our international standard is a combination of three different types of standard. We set and maintain standards defined by our qualifications.

1. **Curriculum standard:** This standard relates to the explicit and implicit demand of the content and skills set out in our syllabuses. The syllabuses and their specifications provide an appropriate selection of material for the age group at an appropriate level of difficulty.
2. **Assessment standard** (also called the attainment standard): This standard relates to the demand of the assessments we set. What students know and can do is measured through assessment processes that are valid, reliable and fair. This means that results students receive are seen as accurate measures of their performance in relation to the particular subjects being assessed.
3. **Grading standard** (also called awarding standard): This standard relates to the achievement we recognise via our grade threshold decisions. Students are awarded a mark/grade accurately reflecting their level of performance.

Maintaining confidence in these standards is fundamental to our operation. We have very strict regulations universally applied to all our schools relating to all areas that might compromise this standard. All of our examination procedures and grade awarding practices, coursework and security regulations are designed to maintain this high level of confidence in our qualifications.

One immediate challenge for new schools is to develop a clear understanding of these Cambridge standards. Only then will they be able to communicate them to learners, parents and other stakeholders. This is obviously important for teachers and leaders in planning, providing, monitoring and assessing the educational programme. It is equally important that learners are helped to develop their own understanding of the standards and what they can do to improve their own achievement.

School standards

There are three other domains of education standard (Faubert 2009) that are particularly relevant to this guide:

- standards related to processes at classroom level
- standards related to processes at school level
- standards related to the school environment.

These three types of standard support the school's achievement of the primary aim: a high standard of educational achievement for all learners. Cambridge International's registration quality standards fit within this category of supporting standards. They set out and exemplify an initial benchmark of quality that schools need to commit to in order to implement successful Cambridge programmes. Because we recognise and value the diversity of schools in the Cambridge family, and the differences in the contexts in which the schools operate, we have not set out further, more aspirational and detailed standards to guide the process of school development. We believe that schools are best placed to determine their own ongoing quality standards, related to their own circumstances and the needs of their learners and communities.

National or state governments are likely to be responsible for determining these standards, as national standards form the basis for evaluation of school quality in the public sector. If national standards are not sufficient for delivering Cambridge qualifications, the school will need to develop and implement their own. In private schools the governing body and/or owner, as well as the senior management, will be responsible for determining these school-based standards. Internationally many schools seek accreditation with one or more accreditation bodies, which publish their own sets of accreditation standards. These are wide-ranging definitions of quality across the whole of a school's work and functions, and are focused both on quality assurance and on promoting improvement. Schools that are considering applying for international accreditation will find this guide very useful, as the principles and practices outlined are consistent with best international practice.

1.5 Curriculum alignment and coherence

While Cambridge International defines the curriculum and assessment standard, schools are responsible for developing standards related to processes at classroom level and those related to processes at school level that will influence student learning. Aligning what is prescribed and expected with what is actually taught and experienced by the student is one critical activity the school has to address. Because teaching happens locally, only schools can be responsible for ensuring that the taught and experienced curriculum is well aligned to Cambridge curriculum and assessment specifications. Furthermore, the Cambridge curriculum is not designed to be delivered in the same way in all classrooms around the world. While Cambridge International defines the standards, the approach to delivering the Cambridge programmes must be contextualised to optimise its value for the local context. Cambridge International provides teaching support material and exemplar materials but these need to be adapted for local needs.

Schools are a complex system of many interdependent parts. Changes in one area will have impacts on others, so a key concept in school development is coherence. Changes should be aligned and designed to pull in the same direction. The direction will be determined by the mission and values of the school. However, one common value for all Cambridge schools must be improving the quality of student learning and preparing students properly for Cambridge qualifications. A school provides a coherent education when the written, taught, assessed and experienced curricula align, and school practices, incentives and written resources (including textbooks) support the curriculum.

1.6 Leadership and management

Both leadership and management are critical to school development. A useful, if simple, distinction relates management functions to effective operations, making sure that the school is running well. Leadership is focused on the direction the school is going in, ensuring it is doing the right things, has a vision and mission that is inspiring teaching and learning, and improving the school's performance in relation to this. Leadership is also concerned with getting the most out of individuals and developing a collaborative culture.

Within the administrative team of a school different management responsibilities will be assigned to different individuals. Often leadership is also viewed in terms of a position – the principal or director. The principal of a school is responsible for making sure that teaching and learning is effective. It is, however, useful to view leadership as a process rather than just a position of authority. Leadership of school development demands a complex set of skills and qualities. This will be a mixture of expertise and abilities best found in a team or a network of leaders. Each individual leader will bring their own set of skills and attributes to the group. These will combine with those of others to make a powerful whole. Discovering, inspiring, motivating and developing this network of leaders of learning is one of the most demanding but rewarding roles of a school principal. In busy schools too much attention can be given to administration, focusing on managing the day-to-day operations, and not enough on leading learning.

International research demonstrates that leaders make a difference to schools. In a review of the impact of school leadership on learner outcomes, Robinson (2007) grouped leadership dimensions into five main categories:

- establishing goals and expectations
- strategic resourcing
- planning, coordinating and evaluating teaching and the curriculum
- promoting and participating in teacher learning and development
- ensuring an orderly and supportive environment.

In her analysis of the effect of each of these on learner outcomes, based on a review of a number of studies, she found that what leaders (in this case primarily referring to principals) do is very important. The more leadership is focused on teaching and learning and the professional development of teachers, the greater the effect on student outcomes. The largest impact was the result of leaders promoting and participating in teacher learning and development. The second was planning, coordinating and evaluating teaching and the curriculum.

While school development should have a particular focus on classroom change, it is much more than that because classrooms do not operate in a vacuum. Developing a culture of learning across the whole school community is important. The school climate has a profound effect on attitudes and approaches to learning. Where appropriate, empowering and involving teachers, students, parents and the broader community will help generate a collective sense of responsibility for school development.

The following chapters are designed to help school leaders (broadly defined) to build the skills and knowledge necessary for improving the success of learners. The focus is on developing those areas that have the greatest impact on learner, and therefore school outcomes. These are the two dimensions of leadership identified by Robinson as:

- promoting and participating in teacher learning and development
- planning, coordinating and evaluating teaching and the curriculum.

We also briefly consider other important related areas.

1.7 What do we mean by 'evaluation'?

We use the term 'evaluation' in several contexts in this guide. Evaluation is associated with two different types of judgement which need to be distinguished:

- judgement with a view to hold to account
- judgement with a view to improve.

Throughout this guide the term 'evaluation' is used in terms of judgement with a view to improve. Cambridge schools will be operating under very different circumstances, and standards and expectations will be largely based on the school's context. This will give rise to different judgements required to hold to account. Beyond establishing that all Cambridge recognition standards are met and maintained, holding schools to account is not Cambridge International's concern. As this is a guide for school development, making accurate and valid judgements with a view to improvement is absolutely central. The purpose of judgement is to bring about change that will better support student learning.

One example of this distinction applies in Chapter 6, which considers evaluating teaching. Some schools and school systems will require teacher evaluation also to be teacher appraisal, where the teacher is held to account. Performance review in this situation might, for example, impact on salary. Schools may or may not have a choice over this. What matters in the context of this guide is that teaching improves as a result of the evaluation process.

The same principle applies to Chapter 2, which considers school development planning. Many state systems apply school accountability measures where evaluation is about holding the school to account. In the context of this guide our concern is the process used, data gathered, judgements made and plans to implement that result in better practice.



2: Creating the school development plan

This chapter provides an overview of school development planning. It makes a link between the application and initial planning that a school completes in order to register with Cambridge International, and ongoing processes of quality assurance and school development. The starting point for school development planning is the requirement that the school fully meets Cambridge quality standards defined in the registration process. Once this is achieved school development planning becomes an ongoing cycle involving evaluation, planning and development designed to improve student learning and achievement. The school development planning process should fit naturally with, and complement, the school's ongoing quality assurance policies and practices. These are considered in detail in subsequent chapters.

2.1 An overview of school development planning

Professor David Hopkins, Professor Emeritus at the Institute of Education, University of London (2006) defined the purpose of the school improvement process as being:

"... to improve the learning and achievement of all students and enhance the school's capacity to manage continuous improvement. The focus is upon school level factors (e.g. leadership, planning, professional development) and classroom level factors (teaching, learning and student feedback). These two areas are united through a process of enquiry."

In this guide school development planning is the overarching process of enquiry, evaluation, prioritisation, planning and execution of plans designed to improve student learning and achievement.

Enquiry is the first part of the process of evaluation. Evidence is gathered and interpreted to ensure judgements are reasonable and accurate. A school needs to create a flow of data and evidence about how it is performing in key areas. This evidence will be generated annually from processes like those described in Chapters 5 and 6, which consider in detail how student learning can be improved through assessment and evaluating teaching. Evidence will lead to judgements about what is working well and what needs attention. The process helps a reflective school to:

- take ownership of monitoring and evaluating its own performance and to plan effectively for improvement
- gather information and evidence to review progress in terms of the whole-school experience as well as learner outcomes
- build up a picture of the quality of provision in the school over time – this will provide the school and its community (the stakeholders) with a measure of how well learners are performing and the standards being achieved
- identify good practice so that it can be shared throughout the school.

Development plans map out how issues identified during the evaluation phase are followed up. They should be a response to the following questions:

- What specific aspects of our work do we need to develop (priorities and intended outcomes)?
- How are we going to develop them (processes)?
- What resources do we need to achieve this (resources)?
- How long will it realistically take to achieve (timescale)?
- Who is going to lead and manage the achievement of each objective and the overall plan (responsibilities)?
- How will we know that we have achieved the plan (evaluation)?

Annual development cycles and periodic whole-school evaluation

Development planning can just be based on an annual review using evidence generated in the process of running the school. One limitation of this is that it does not allow for a more complete evaluation of the school system as a whole. It also uses a limited number of sources of evidence. For this reason we advise schools to periodically (usually every five to 10 years) have a major whole-school evaluation.

How this is organised will depend on the school context. Normally the process starts with a comprehensive school self-evaluation. This examines all areas of school life, updates the school's mission, vision and educational aims, and considers school strengths and limitations from the perspective of the whole-school community. There are roles for representatives from each group of stakeholders including teachers, students, parents and governors or owners. Their contributions will provide perspectives that will inform the school's review and help identify the next steps that need to be taken. The process is a learning activity for all those engaged in it. The school leadership team should plan to devolve responsibility to groups of other leaders, teachers and stakeholders. If the process is managed well, all those who participate will gain skills, experience and confidence.

Sometimes the school is seeking accreditation with an agency. See, for example, the Council of International Schools (2015). In this case the school evaluation process will use a standard self-evaluation format and incorporate external validation of this. This involves a team of appropriately experienced external evaluators visiting the school. Their role is to validate the school's self-evaluation, be 'critical friends' and make sure the school is actually meeting the standards required for accreditation. They provide an informed outsider's perspective and check the self-evaluation is a realistic reflection of the quality of education in the school.

A strategic development plan is normally created following this comprehensive process of whole-school evaluation. Once written, the strategic plan identifies and explains the school's strategic priorities for a specified period of time, normally 5–10 years. It also identifies actions needed to achieve these goals and considers how resources will be used to achieve the plan. Within this timeframe there is likely to be detailed planning for the first year or two, with higher-level planning for the rest of the plan's lifetime. Implementation will be monitored and the plan will be adjusted in the light of ongoing feedback incorporated in the annual development cycle. Towards the end of the plan the outcomes will be evaluated and the process will then begin again with a new review and self-evaluation. The long-term strategic plan created by this process will provide guidance for the whole-school community – about the school's objectives, how they are to be achieved, and how the members of the school community will contribute to their achievement.

The annual school development cycle, sometimes referred to as the management cycle, is a process of goal setting, implementing actions, monitoring, evidence collecting and evaluation that occurs every year. This leads to affirmation or refinement of the school's strategic plan (see Figure 1).

Figure 1: The annual school development cycle



2.2 Achieving Cambridge registration quality standards

Schools registering with Cambridge International are required to complete an application form showing how the school measures up across five sets of registration quality standards (see Table 1). Some standards have to be fully met before the school can teach Cambridge programmes. These include:

- a clear mission
- positive relationships between staff and students
- appropriate qualified staff
- reasonable and safe premises
- transparent financial management and procedures for complaints
- examinations security.

See *Becoming a Cambridge International School: A Guide to the Registration Process* for full details. You can find this document at **www.cambridgeinternational.org/images/163193-becoming-a-cambridge-international-school.pdf**

Schools, however, are not expected to demonstrate evidence of having fully achieved all the registration standards before they are registered. They can be 'working towards' achieving some of these standards. Examples are:

Standard 1: The school's mission and educational values

- The culture of the school is learner-centred and supports students and teachers to become confident, responsible, reflective, innovative and engaged.
- International awareness and global perspectives are promoted throug h the curriculum and other activities.

Standard 2: School management and leadership

- The school principal is suitably qualified and experienced in educational leadership.
- The senior management team and the governing body demonstrate clear goals for the successful introduction of Cambridge qualifications and can evidence planning to support effective implementation.
- Senior staff are committed to setting targets for school improvement and staff development, supported by well-designed performance review and self-evaluation.



Standard 3: Quality of teaching and learning

- The school curriculum is clearly expressed and accessible to teachers, students and their parents.
- Assessment outcomes are monitored and evaluated with clear feedback into teaching and learning strategies.
- Teaching takes account of students' diverse learning styles and individual needs.
- The school has a well-designed approach to the professional development of teachers and other staff.
- The school has a clear policy to address the language needs of learners.

Depending on the outcome of the registration process, schools will need to review and build upon their initial development planning in order to make sure that these standards are fully achieved as soon as is practically possible. This must be the initial priority for newly registered Cambridge schools – this document is designed to help in this process. Even when the Cambridge registration standards are achieved, schools will want to make sure that they are maintaining them and striving for further improvements. No school can ever claim that it is perfect or afford to be complacent. One of the hallmarks of excellent schools is the fact they are constantly seeking improvements in ways to enhance the learning and achievement of all students.

2.3 Preparing the school development plan

The Cambridge registration quality standards (see Table 1) provide a suitable starting point for new schools implementing formal school development planning for the first time. Schools that have recently registered with Cambridge International should use the initial development plan, part of the application process, as the starting point. Following registration most schools will have some standards identified as needing further work, and the initial priority must be to address these. Once this is achieved the objective becomes continuous school improvement.

Reviewing the initial implementation of Cambridge programmes

Conducting regular reviews of the school curriculum, and the effectiveness of its implementation and delivery, is a critical part of the school development process. An absolute priority for newly registered schools will be to evaluate the implementation of the Cambridge programme. This will include reviewing the effectiveness of each of the contributing factors, answering the following questions:

- How well do the schemes of work and teaching plans support the successful implementation of the curriculum in the classroom? (the school's written curriculum is well aligned with the Cambridge prescribed curriculum)
- Are teachers using appropriate teaching strategies? (the written curriculum is well aligned with the taught curriculum)
- Are learners achieving appropriate results? What progress have learners made? (the assessed curriculum is aligned with the taught and written curriculum)
- What is the experience of learners? (the experienced curriculum is aligned to the written, taught and assessed curriculum)
- Are the conditions for learning supportive?
- Do teachers have the necessary resources and professional development?
- Are school policies well aligned, establishing the right priorities and sending the right messages?

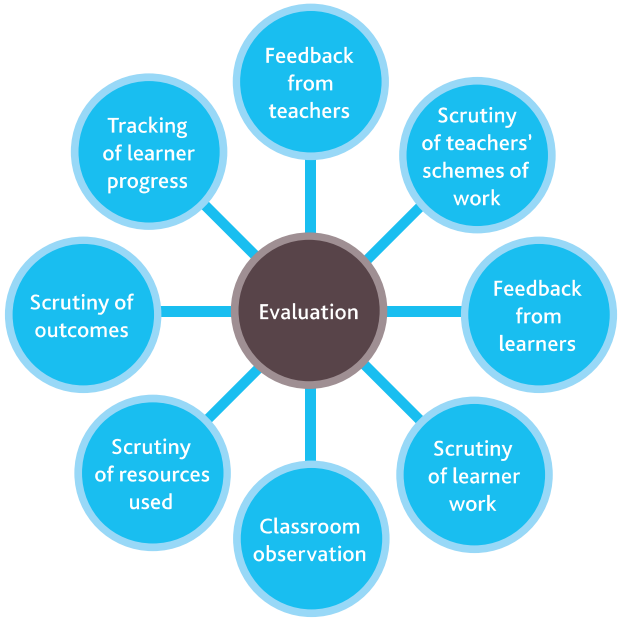
To evaluate effectively, no one piece of evidence is sufficient on its own. You will need to collect data from a wide range of sources and compare it to generate an overall picture. This is sometimes referred to as triangulation. Figure 2 shows a review model for a school evaluating the initial implementation of a Cambridge programme, identifying different sources of feedback. This review model can also be used for evaluating the student learning experience in groups of subjects, grades and for specific groups of learners.

Meeting our registration quality standards

Table 1: Cambridge registration quality standards

1. The school's mission and educational values	2. School management and leadership	3. Quality of teaching and learning	4. The physical environment of the school	5. Legal requirements
a. The school has a clear mission statement that makes reference to its educational values. **b.** The culture of the school is learner centred and supports students and teachers to become confident, responsible, reflective, innovative and engaged. **c.** International awareness and global perspectives are promoted through the curriculum and other activities. **d.** Relationships between staff and students are positive, demonstrate mutual respect, and the school has established and consistent expectations of behaviour.	**a.** The school principal is suitably qualified and experienced in educational leadership. **b.** The senior management team and the governing body demonstrate clear goals for the successful introduction of Cambridge qualifications and can evidence planning to support effective implementation. **c.** Senior staff are committed to setting targets for school improvement and staff development, supported by well-designed performance review and self-evaluation. **d.** There is effective and transparent management of school budgets. **e.** A complaints procedure is in place that effectively manages complaints for parents and other stakeholders.	**a.** The school is appropriately resourced with sufficient staff employed in management, teaching and support roles. **b.** The school curriculum is clearly expressed and accessible to teachers, students and their parents. **c.** Assessment outcomes are monitored and evaluated with clear feedback into teaching and learning strategies. **d.** Teachers have appropriate qualifications to deliver Cambridge programmes and qualifications successfully. **e.** Teaching takes account of students' diverse learning styles and individual needs. **f.** The school has a well-designed approach to the professional development of teachers and other staff. **g.** The school has a clear policy to address the language needs of learners.	**a.** The school premises create a positive learning environment for students. **b.** Library or learning resources adequately support delivery of the curriculum. **c.** Specialist facilities are provided (e.g. for Cambridge syllabuses in art and design, music, languages, ICT, physical education and the sciences). **d.** Secure storage arrangements for question papers and other examination materials comply with our regulations. **e.** Appropriate facilities that comply with our regulations for accommodating examinations have been identified. **f.** A good understanding of the Centre responsibilities set out in the first section of the Cambridge Handbook.	**a.** Fire certificate. **b.** Government approval to operate, including any approvals needed to provide the Cambridge curricula you wish to offer. **c.** Health and safety policies in line with government requirements. **d.** First aid provision in line with government requirements. **e.** Child protection policies in line with government requirements.

Figure 2: Sources of evidence for a school reviewing the implementation of a Cambridge programme



Structure and templates to assist planning

Schools will adapt or develop a format that meets their own needs and circumstances – no one template is suitable for all. There are two points to take into account before choosing a format:

- The period of time covered by the plan. Medium to long-term strategic planning normally considers a period of about 5–10 years. The format of the plan should help users to see how the planned activities are completed over this time. Annual plans need to be more specific, showing in detail the full set of activities and outcomes for that year. This way all contributors will have a clear understanding of what to do.
- The priorities identified in the plan. Plans should prioritise and focus on the most important developments. Some can be achieved in a year and some will take several years to achieve. The format of the plan should help users to understand the individual objectives and how they are to be achieved. It should also show how the objectives interact and are connected.

The plan format will include high-level overviews of the development plan priorities and objectives, as well as detailed summaries of activity by priority. It is best to present the information in a table format, with explanations as necessary. The format and language of the plan should be accessible, not just to school leaders and teachers but also to other members of the school community and stakeholders.

Table 2 (on page 15) is an example of an annual planning template for an imaginary school that is about to start its second year teaching Cambridge IGCSE® programmes. This school wants to make sure that important changes in teaching and learning started in the first year will continue and expand into the second. The school has decided it needs to focus on the teaching of science (the introduction of science practicals), English (a stronger emphasis on listening and speaking, and on extended writing) and history (development of source-based analysis). These objectives are all intended to have a direct impact on the quality of teaching and learning (Cambridge registration standard 3 as well as registration standard 1b: *The culture of the school is learner centred and supports students and teachers to become confident, responsible, reflective, innovative and engaged).*

These three subject departments will identify case studies of good practice from the first year of teaching. This includes the use of assessment in support of learning, learner feedback and effective practice identified from other sources, particularly Cambridge training courses teachers have completed. This material will be discussed and heads of department will be responsible for preparing the detailed plans with actions, responsibilities and success criteria identified. Departments will review and update their schemes of work and monitor the teaching of the new Grade 10 schemes. Towards the end of the plan period, once the results from the first Cambridge IGCSE entry are available, the school will review the whole Cambridge IGCSE programme. It will use data from questionnaires and 'exit interviews' with students completing the programme. Specific activities are described in the plan. We consider the following in detail in subsequent chapters: teacher evaluations, mentoring, writing schemes of work and assessment in support of learning.

The final column will be used for periodic reports on progress, using a 'traffic light' (Red, Amber, Green – RAG) system. In the RAG report, red type indicates that the activity is not on target, amber that deadlines or actions are at risk, and green that the activity is meeting deadlines and on target. When the activity is finished it is marked as completed.

Practices also need to feed into, and be supported by, clear school-wide policies. (This is the subject of the Chapter 3.) These can support the development of teaching practice at a whole-school level. This will support the extension of new styles of teaching and learning into other areas of the curriculum and other years.

Table 2: Imaginary annual planning relating to specific objectives

PRIORITY 1: Teaching and Learning							
OBJECTIVE: To support the continuing development of learner-centred pedagogy in Cambridge IGCSE courses in Grade 10							
RELEVANT CAMBRIDGE STANDARDS: 1.2, 3.3 and 3.5							
LEADERSHIP/COORDINATION BY: Ruchira Mitra							
MONITORING/EVALUATION BY: Lee Harris							
	Specific objectives	**Tasks and action required**	**Who is responsible?**	**Timescales/ key milestones**	**Resource implications?**	**Success criteria – Impact on student learning and achievement**	**Progress report (RAG)**
1	Science a. Develop science practicals	• Evaluation of first year Cambridge IGCSE implementation identifying good practice	Waleed	May previous year	$10,023	Evaluation produces clear recommendations	Closed
		• Upgrading Science lab B	Juan	Work completed Jun–Jul		Work completed by 31 July	Red
		• Mentoring	Waleed to mentor John	Sep–Dec		John's evaluation in January	Green
		• Teacher evaluation criteria added and included in evaluations	Sarah	Jan–Jun		Evidence emerges in evaluations	Green
		• New assessments in support of learning designed and incorporated into schemes of work	Sarah to lead	Sep–Dec		Evidence in schemes of work and their implementation observed in teacher evaluation process	Amber
2	English A. Enhance listening and speaking skills B. Support extended writing	• School workshop bringing in consultant David Smith	Hema to organise	15 October	$500	Recommendations identified and implemented	Closed
		• Rewrite schemes of work indicating how skills are taught	Hema to oversee	By 31 Aug before teaching begins		Evidence in schemes of work and their implementation observed in teacher evaluation process	Green
		• Mentoring	Hema to mentor Chris	Sep–Dec		Chris's evaluation in March	Green
		• Teacher evaluation criteria added and included in evaluations	Jane	Jan–Jun		Evidence emerges in evaluations	Completed
3	History A. Develop students' ability to analyse source material	• Attend Cambridge introductory History training workshop	Peter and Uzma	Sep	$500	Attending conference and dissemination of feedback to department	Completed
		• Purchase new textbooks identified as supporting source interpretation	Jay	Aug		Purchased and used	Completed
		• Rewrite schemes of work indicating how source material will be taught	Whole department led by Mark	By 31 August before teaching begins		Evidence in schemes of work and their implementation observed in teacher evaluation process	Completed
		• Teacher evaluation criteria added and included in evaluations	Mark	Jan–Jun		Evidence emerges in evaluations	Green

3: Developing policies that support improvements in teaching and learning

This chapter explains the importance of having clear policy documents that define values, principles and practices to guide school evaluation and development. We identify key policy documents and consider processes that you can use to create and revise them. This chapter also has a brief section considering how parents should be engaged to support school policies and practices aimed at enhancing learning.

3.1 Policy documents

A policy is a guide for action based on clear principles. A policy is only worthwhile if it is used and influences practice and decision-making in the school. If it just remains in a file on a shelf it serves no purpose and has no value. School policies will inform the development and revision of other documents, for example student, staff and parent handbooks.

As we require a number of supporting documents for the Cambridge registration process, schools that have completed the process will already have some policy documents. These will need regular review and updating in parallel with the school evaluation cycle. In this chapter, we provide guidance on writing policies and the structure and content of effective policies. Statements that clearly define standards are also important policy documents, in particular those defining the school's expectations for teaching and learning, assessment and teacher evaluation. We cover these in Chapters 4, 5 and 6.

Key policy documents include:

1. **Mission statement and educational values:**
   The mission statement is a written declaration defining the school's educational purpose. The school's educational aims and values might be included in the statement or listed separately. Some schools also publish a vision statement. This gives an indication of the future direction of the school, and should be widely shared and inspire commitment. These three elements should focus the development planning process and guide the educational priorities of the school. They are therefore very important, informing on all other policy documents.
2. **School curriculum policy:**
   This policy sets out the principles upon which the school's curriculum has been constructed. It explains how the curriculum should progress vertically (from one age level to the next) and horizontally (the requirements and choices for a particular year). The document might also exemplify the principles and approaches to teaching, learning and assessment. Or, these might be covered as separate policies that are cross-referenced with each other (see Chapter 5.2 on assessment policy). The curriculum policy will also identify the outcomes expected for learners. It will be based upon the school's vision and mission statements, and should clearly relate the curriculum that is offered to the school's educational values and the Cambridge learner attributes (see Chapter 4, Table 4).
3. **School language policy:**
   This requirement is included in the registration process, specifically for bilingual and multilingual schools. These schools need to make clear how they will structure the curriculum, and organise programmes and support to meet the needs of learners for whom English is a second or third language. It is also important in schools with a majority of students who are proficient in English but do not have English as their first language or mother tongue. The language policy should indicate how the school will encourage and support the maintenance of students' first languages.
4. **Performance management – Teacher and leaders' evaluation:**
   This will include an account of how the work of teachers and leaders is evaluated. It should include explanations of accountability for each individual's responsibilities. Standards for teachers and leaders will be identified and evaluation practices explained based on the principles that underpin them. In Chapter 6 we give

guidance on developing standards for teaching planning and putting into place a teacher evaluation system. We consider that school boards and/or the school owner are responsible for the performance review of the school director, chief executive or principal.

5. **School professional development policy:**
   The professional development policy sets out the purposes and objectives of the school professional development programme. It describes the kinds of professional development that are available to staff and their responsibilities and entitlements in this area. Plans for professional development need to be very closely linked to the evaluation process. Therefore, this policy needs to be cross referenced with the performance management policy and school curriculum policy, which will identify priority areas that need to be supported.

6. **Code of conduct for students and teachers:**
   We do not cover student conduct and behaviour in this guide. However, it is self-evident that students must have a clear understanding of expected behaviours and schools must consistently apply appropriate rules of conduct to achieve excellent learning outcomes. Cambridge schools will want to include in the code some account of the Cambridge learner attributes and how they relate to the expectations and social and academic behaviours of learners in the school.

7. **Complaints policy:**
   The way in which the school deals with complaints, particularly those from students and parents or carers, needs to be clear.

   Other important supporting documents include:

8. **Organogram and job descriptions for the senior management team:**
   The organogram is a graphic representation of the organisational structure of the school. It shows the individual members of the senior leadership team, from the principal down, their titles and areas of responsibility, and other key leaders and groups of staff they are responsible for. The job descriptions should clearly state the overall purpose and accountabilities of each management position, and identify specific roles and responsibilities. There should be a clear line of accountability, in terms of who the post-holder reports to, and which key positions report to the post-holder. Finally, it should show any conditions that affect post-holders' work, and the constraints within which they work. The job descriptions will have been discussed with and accepted by the individual post-holders. The organogram should demonstrate a clear, analytical account of the major areas of responsibility for achieving school objectives.

9. **Roles and responsibilities with respect to Cambridge programmes and** qualifications for senior management team:
   In many schools a Cambridge curriculum is followed by all students, but in other instances it is part of a wider curriculum. Therefore leadership responsibilities for the Cambridge programme may make up the whole of an individual's responsibilities, or only a part. It is equally important that the school identifies and records how leadership responsibilities associated with the effective provision of a Cambridge programme have been allocated. The detail of these responsibilities will be included in job descriptions.

10. **Key staff CVs (principal and teachers involved in teaching Cambridge syllabuses):**
    Cambridge International needs to see these CVs as assurance that all involved have, or intend to achieve, a level of skill and experience appropriate to their specific responsibilities in the Cambridge programme. These documents are also important for teacher evaluation and professional development planning. Therefore all school leaders and teachers will want to maintain up-to-date versions.

3.2 Creating, developing and implementing school policies for teaching and learning

Schools will have some written guidance and information for teachers, learners and parents about how the school operates, even if formal policies do not exist. Examples might include a staff handbook that gives guidance on what teachers should do if a child misbehaves in school, or how they should assess learners' work. A handbook for learners and parents will include a range of information such as school procedures, homework and reporting guidance. These handbooks should be based on clear policies rather than policy emerging from the handbook.

Writing clear policies is a very valuable process that can help the school run better. Clear policies will make sure that the approaches used by everyone in the school are consistent and efficient. These will then determine what is written in secondary documents including handbooks and procedures.

Suggestions for developing or reviewing school policies:

- Establish a School Policy Steering Group. This group will prioritise work, consider draft policies, make any final revisions and make sure all school policies are consistent and reflect the school ethos and values. Consider including parent, governing board and different staff group representatives, as well as senior management. Too many representatives, however, will make the group less effective. As quality is more important than quantity, focus on writing and reviewing a few policies each year.
- Set up working groups, reporting to the steering group, to draft each policy. Consider including parents and older learners in these groups where appropriate. These groups will discuss, develop and then write the draft policies, so each one will need to include at least one senior member of staff.
- Use the expertise and experience available in the school. For example, if a teacher or administrator is responsible for assessment, it makes sense to involve them in writing the draft assessment policy or to lead the working group tasked with writing it.
- Use example policies or policies developed by other schools as a starting point, but do not implement them in full. For the policy to succeed you must own it and make it specific to your school's context.
- Clarity and brevity are important. Attach appendices and refer to other policies and guidance documents where necessary.
- Policies need to be accessible to the whole community and need to be written in language(s) that make this possible.
- Consult with representatives of all those affected by the policy before publishing the final version. Where policies are new, think about how and when they will be introduced.

Policies can be short and to the point – the procedures and the instructions that follow will give more detail of how the policy is implemented. This elaboration is suitable in documents like handbooks for teachers, learners and parents, which is why these should be produced (or revised) after policies are established.

Each policy will usually be formed through consultation and be written by people with the most knowledge and understanding of the subject area. Therefore it is a good idea to agree on a template that you can use for all policies. This will make sure that the approach and style are consistent and will act as guidance for those writing the policy.

Table 3: What makes a good policy

What makes a good policy?
• informative • clear • as concise as possible • easy to understand • up to date • reviewed regularly • approved by a group that includes the principal and/or senior leaders • consulted upon with stakeholders (staff, parents, learners …) and, where necessary, with legal counsel • approved by the governing board • its application in school practice is evident
Policies should include:
• the name of the school • the title of the policy • the purpose of the policy • the scope of the policy and to whom it applies • the date and issue number of the policy • the date by which the policy should be reviewed • the name and title of who is authorising the policy • references to any other appropriate policies.

3.3 Engaging parents and carers in improving learning

"*Education is a triangle with three legs: parents, child, school and if any of the legs fall, the triangle falls as well*" (Harris and Goodall 2007, p. 2).

Parents are key partners in the drive to improve student learning. Their active participation in this partnership makes a difference, and so engaging with parents is a key priority for any school. According to evidence gathered in the United States (Henderson and Mapp 2002, p. 7) learners whose parents were involved with their school and their learning were more likely to:

- achieve more highly (gain higher grades and test scores)
- enrol in higher-level programmes
- attend school regularly
- have better social skills, be well behaved and have good attitudes to school and to learning
- graduate from school with the qualifications to go on to higher education.

Parents can make a very significant contribution to the self-evaluation and goal-setting processes described in Chapter 2. In some cases it might make sense for parents to be involved in policy developments described above. It is absolutely essential that parents understand the mission and values of the school.

Learning does not begin or end at the school gate. If parents understand and support the learning that happens in school, this will have a very significant impact on learner achievement. Parental engagement is more about parents engaging with the learning of their children, rather than engaging with the school. When parents and teachers work together to improve learning, learners achieve more highly. When parents support their child's learning in the home, it makes a bigger difference than when they support activities in the school. Parental involvement in school-based or school-related activities can have an impact on a child's social development and can help to embed the partnership with the school. However, where these activities are not directly connected to learning they have little impact on learner achievement.

Schools should consider the following:

- Make parental engagement a priority. Have a clear communications plan with parents.
- Prioritise parents engaging with their child's learning rather than just involving parents in the school. Support the engagement of parents who are already involved in their children's learning, as well as trying to improve the partnership with those who are less engaged.
- Be as flexible as possible in provision for meeting parents face to face and talking to parents remotely. Where it is difficult for parents to come to your school regularly use alternative means of communication, for example video-conferencing or video phone calls.
- Think carefully about the nature of communication with parents. Is it two-way or usually just communication that informs or reports to parents? Are parents encouraged to communicate openly about their child's learning and progress? How can this process be improved?
- Use new technologies to support parental engagement, but think carefully about the best way to do this. For example, share course outlines online and, where appropriate for certain age groups, homework assignments.
- Include policies and practices for engaging parents in appropriate school policy documents.



4: Teaching Cambridge programmes

Learning happens when students have to think hard (Husbands 2014).

Improving teaching is the single most important intervention that a school can make to improve students' learning and performance. The written curriculum is produced in the school and is an interpretation of Cambridge syllabuses reflecting local needs. Schemes of work are either adapted from models supplied by Cambridge International or written by teachers and used to guide teaching. One indicator of excellence is that the written, taught, assessed and experienced curricula are well aligned. Good teachers constantly use feedback from students to fine tune their plans and activities (considered in detail in Chapter 5). The most effective approach to delivering Cambridge programmes is active learning. We briefly consider this here, giving links to other Cambridge resources. Excellent teachers are highly reflective and focus not only on the outcomes or products of learning, but also on the processes of learning. Differentiation centres on looking for patterns of needs in students. Existing and emerging technologies can be valuable teaching and learning resources if they are thoughtfully incorporated into planning.

4.1 The quality of teaching

Excellent teaching is the most significant factor that affects learners' academic performance and the development of the learner attributes (see Table 4). Successful schools develop and nurture highly skilled teachers who are encouraged to be creative professionals working in a collaborative culture. Good teachers have high expectations of the learners in their classrooms, and of themselves as learners of pedagogy and practice. They see their own development and learning as a continuous process.

What teachers do in the classroom has the biggest impact on student learning and outcomes. A good written curriculum by itself does not result in improved learner progress unless the teaching is also good. "A bad curriculum well taught is invariably a better experience for students than a good curriculum badly taught ... what matters is how things are taught" (Wiliam 2011, p. 13). Effective teaching increases the rate of learning. According to Wiliam (2011, p. 20), citing recent studies: "The most effective teachers generate learning in their students at four times the rate of the least effective teachers."

Coe et al (2014) define effective teaching as that which leads to improved student achievement using outcomes that matter to their future success. They identify six components of great teaching, all of which are important. The two with the strongest evidence of impact on student outcomes are pedagogical content knowledge and quality of instruction. Effective teachers have a deep knowledge of their subjects as well as an understanding of how students think about subject content at different developmental stages (pedagogical knowledge). They support this with a range of effective practices including:

- the effective use of questioning
- the effective use of assessment
- reviewing previous learning while progressively introducing and scaffolding new learning
- giving time to embed skills
- modelling good thinking.

Classroom climate and management moderately affect student outcomes, with teacher beliefs and professional behaviours having some evidence of impact.

Muijs et al (2014) consider key findings from 35 years of research on effective teaching. The quantity of academic activity is critical. Effective teachers manage the classroom environment. They maximise students' active engagement with learning, supported by an appropriate school calendar and timetable. There is a climate and culture of learning both in the class and the school. Effective teachers carefully structure lessons, beginning with overviews and objectives, explaining the content to be covered, identifying the most important ideas and reviewing key learning objectives. In this way they help students to understand the place of a particular piece of learning within the larger picture, helping them make connections.

Good teachers also instruct and talk much of the time. It is a misconception that they let students do most of the talking. Effective teachers spend much of the time asking focused questions, facilitating discussion and giving feedback rather than lecturing. Instruction and questions are carefully targeted to make students think hard. It is not enough for teachers to have good knowledge of the subject and the material they are teaching, although this is essential – they must make it understandable to learners. Planning the overall course thoroughly, as well as unit and lesson planning, is important so that the learning journey is clearly defined. Planning a variety of learning activities and developing an environment in the classroom that engages, stimulates and supports learners is important. Effective teachers check learners' understanding repeatedly and make sure that learners are able to use and apply their understanding in different contexts. They respond to the feedback learners give them by adjusting the way they are teaching. In this way teachers help to bring understanding and knowledge to a higher level than learners could achieve on their own – focusing on what Vygotsky (1978) describes as the **zone of proximal development**.

Muijs et al (2014) emphasise teachers' expectations of students as an important factor in teacher effectiveness. Pupils who teachers expect to do well actually do better. This is not just a matter of teachers accurately predicting student potential. Students are very sensitive to subtle messages and behaviours generated by teachers' expectations.

More recently there has been evidence identifying the importance of metacognitive awareness and strategies on students' academic performance (see Muijs et al 2014).



Metacognition, often described as thinking about thinking, is concerned with the learner managing their own learning. To be effective this is a complex process because the learner has to accurately understand their learning, different procedures, strategies and skills, and know when and how to use them. They also need to be able to self-evaluate the effectiveness of their actions, so self-regulate. It also requires students to have a disposition to behave in a certain way. Of particular interest is research that suggests that effective metacognitive awareness and behaviour might, up to a point, compensate for students' cognitive limitations in a discipline (Veenman et al 2006 in Muijs et al 2014). What teacher behaviours support the development of metacognitive skills?

Metacognition is closely associated with helping students become self-regulated learners – learning how to learn. It is essential that learning how to learn is naturally infused in the process of subject learning – it cannot be effectively taught in isolation. Good teaching has always supported the development of metacognitive awareness, and

the practices identified throughout this guide provide a good starting point. Having a higher-level overview of the subject and what constitutes excellence is important for learners as it provides a basis for them to understand their own work in relation to it. Supportive approaches include:

- effective feedback, using assessment as a tool that supports learning
- searching questioning that requires students to reflect on the processes, not just the products of learning
- teachers modelling effective thinking.

Students and parents need to be aware of the value of nurturing this capacity. It will help improve student academic performance as well as develop learning maturity, supporting students in further education and the workplace.

One distraction that is often presented is that skills are emphasised and presented as an alternative to content. As Hattie (2015, p. 14) argues, this is a false dichotomy: "*The art of teaching is to balance the need for surface knowledge with deep processing of this knowledge. Deeper thinking skills need content on which to work. You cannot use deeper thinking skills unless you have something to think about.*" As Hattie points out, when learning something new, the learner first needs to develop surface understanding based on knowledge and simpler applications of skills. Strategies like enquiry-based and problem-based learning should build on a solid foundation of surface-level understanding. Excellent teachers understand when to teach new ideas developing surface understanding, and when to extend these and go deeper. This is particularly important when planning lessons and schemes of work.

Another distraction for teachers can be ideas simplistically presented as effective approaches to teaching and learning. There is little evidence, for example, of the effectiveness of learning styles and multiple intelligences (Muijs et al 2014). Too often these complex concepts are misunderstood and misrepresented in terms of teaching approaches and applications.

4.2 Active learning

The approach to teaching and learning required for learners to achieve their maximum potential using Cambridge curricula and assessments is based on active learning. Active learning is often misunderstood. It does not mean that learners have to be involved in lots of activities in each lesson or that all activities need to be centred on student enquiry. It refers to processes that engage learners and promote the skills of analysis, evaluation, problem solving, synthesis, critical reasoning and creativity – in other words, requiring learners to think hard. So activities such as reading, writing, discussion (in groups or whole class), collaborative learning, problem-based learning, the use of simulations and case studies can all be used for active learning, provided they are well planned in relation to the learning objectives.

Teaching and learning have strong cultural dimensions. Sometimes schools new to Cambridge International worry about how they can implement active approaches to teaching and learning. Often these are schools working in cultures where the teacher is an authority and the student is not encouraged to question. While schools do need to engage with the concepts and strategies associated with active learning, it is important that they do this in a sensitive way, taking into account their own circumstances. We advise you to manage change in an incremental way. For example, a school could take only a few of the ideas presented in this guide and work on these during the initial years of school development planning. If the school is operating in a culture and community where student performance in examinations is the overriding imperative, then focus initially on developing formative assessment. This will be restricted to the purpose of feeding back into the teaching and learning process in support of Cambridge qualifications and assessments. (See Carless 2011 and Section 5.1 in the next chapter.) Doing this really well is an important first step for more ambitious approaches in the future.

The Cambridge learner attributes (see Table 4) are designed to support active learning. They encourage learners to take intellectual risks and recognise that the processes of learning are important, not just the products of learning. How this is done needs to be based on school culture and context. Cambridge learners will achieve more if they see learning as challenging and enjoy the act of striving for achievement, a necessary part of growth. There are many important habits that different cultures value, which should

be nurtured. Resilience – the ability to continue when finding work difficult and to learn from successes and failures – is vital for success. Deliberate and persistent practice is also critical for success. In certain contexts, memorising facts and texts will provide important surface knowledge that can be built on more actively in the future.

4.3 The written curriculum: Schemes of work

All teaching needs to be carefully planned. Schemes of work (sometimes called scope and sequence documents) show what topics, content, concepts and skills the teacher is intending to cover and the order in which they will be taught. They also provide an outline of the learning journey and may show the activities that will be incorporated into the lessons. Schemes of work provide the teachers' interpretation and plan for delivering the syllabus.

Cambridge International produces schemes of work to support many of its syllabuses. These present one way of delivering the course but they are neither prescriptive nor exhaustive in their content – teachers are expected to adapt them to their own purposes. Many teachers prefer to write their own, working with department heads and other responsible managers. For an inexperienced teacher or department, the Cambridge scheme of work provides useful support. It can reassure the teacher that they are covering the topics, content, concepts and skills required by the syllabus. The Cambridge schemes of work can be particularly helpful in demonstrating how to structure and sequence learning in a logical and coherent way, throughout a unit of work and a whole year's learning. Schemes of work are working documents and can be modified based on feedback as it occurs while delivering the curriculum. They need to reflect the local context of the school and be based on the school culture, timetable, vision and mission.

Planning is a process involving a number of stages (see Figure 3). Good teachers tend to design their teaching backwards (see Wiggins and McTighe 2005).

- The scope and sequence documents help identify the context – how a particular lesson or unit fits into the broader written curriculum expectations.
- Teachers identify the knowledge and skills learners need to master – the learning goals or priorities for a unit of work.
- Next, they decide the method learners will use to demonstrate learning – the success criteria or evidence that will be used to measure this.
- Then they plan the learning experience – the activities learners will use to master the content and skills being taught.

While planning is a process completed before instruction, actual teaching must be sensitive to learning that is actually happening, with constant checks on learners' understanding. Teachers need to constantly review and adjust their teaching, being prepared to adapt and change their plans based on the evidence of student learning. In this way the experienced curriculum can be aligned with the taught and the written curricula.

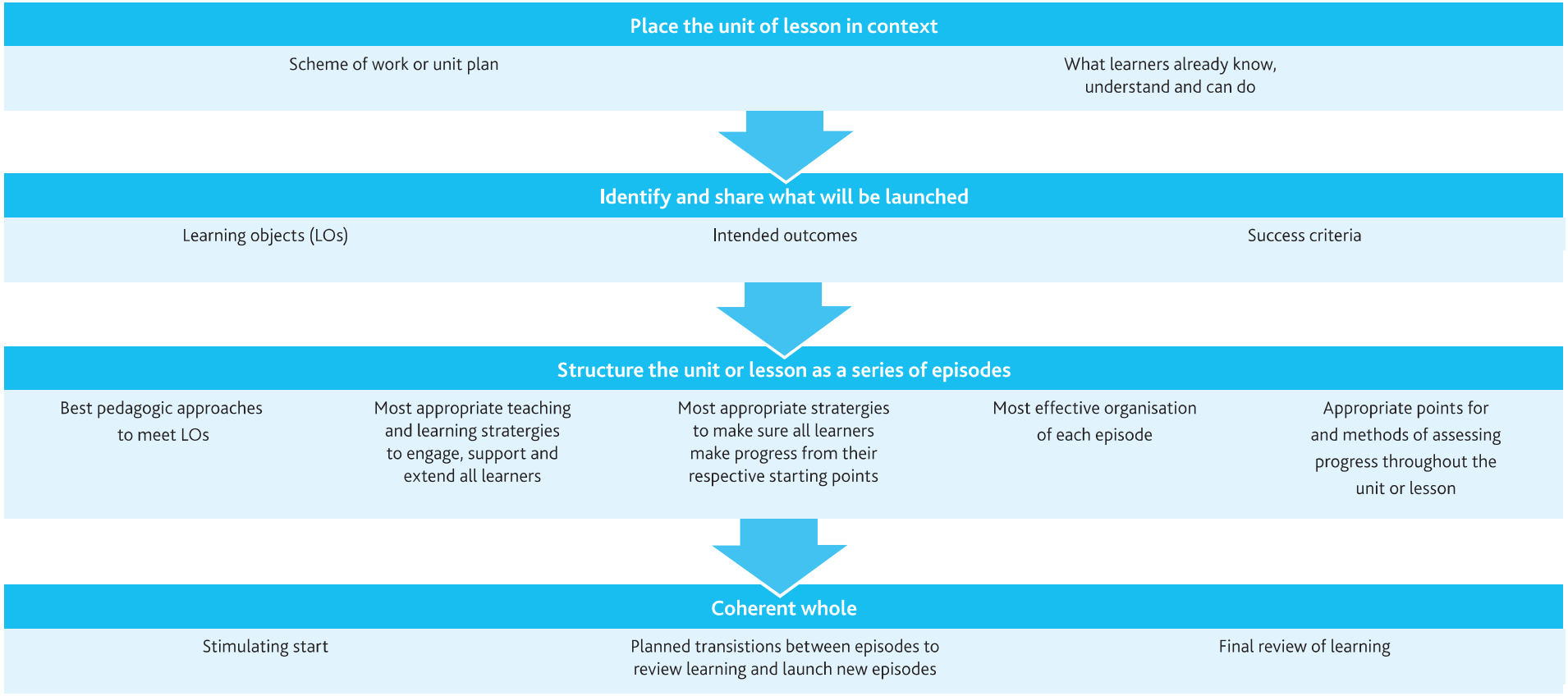
Evaluating the written curriculum, linking it to the taught and experienced curricula is an important part of teacher evaluation considered in Chapter 6.



Table 4: Cambridge learner and teacher attributes

Cambridge learners	Cambridge teachers
Confident in working with information and ideas – their own and those of others. Cambridge learners are confident, secure in their knowledge, unwilling to take things for granted and ready to take intellectual risks. They are keen to explore and evaluate ideas and arguments in a structured, critical and analytical way. They are able to communicate and defend views and opinions as well as respect those of others.	**Confident** in teaching their subject and engaging each student in learning. Cambridge teachers know their subject well and know how to teach it. They seek to understand their learners and their educational needs. They strive to communicate a love of learning and to encourage students to engage actively in their own learning.
Responsible for themselves, responsive to and respectful of others. Cambridge learners take ownership of their learning, set targets and insist on intellectual integrity. They are collaborative and supportive. They understand that their actions have impacts on others and on the environment. They appreciate the importance of culture, context and community.	**Responsible** for themselves, responsive to and respectful of others. Cambridge teachers are highly professional in their approach to teaching and they are collaborative and supportive. They understand their actions will help shape future generations and they are concerned about the holistic development of every individual they teach.
Reflective as learners, developing their ability to learn. Cambridge learners understand themselves as learners. They are concerned with the processes as well as the products of their learning and develop the awareness and strategies to be lifelong learners.	**Reflective** as learners themselves, developing their practice. Cambridge teachers are themselves learners, seeking to build on and develop their knowledge and skills through a virtuous circle of reflection on practice – involving research, evaluation and adaptation. They support students to become independent and reflective learners.
Innovative and equipped for new and future challenges. Cambridge learners welcome new challenges and meet them resourcefully, creatively and imaginatively. They are capable of applying their knowledge and understanding to solve new and unfamiliar problems. They can adapt flexibly to new situations requiring new ways of thinking.	**Innovative** and equipped for new and future challenges. Cambridge teachers are creative, experimenting with new ideas and pursuing an enquiring approach in their teaching. They are open to new challenges, being resourceful, imaginative and flexible. They are always ready to learn and apply new skills and techniques.
Engaged intellectually and socially, ready to make a difference. Cambridge learners are alive with curiosity, embody a spirit of enquiry and want to dig more deeply. They are keen to learn new skills and are receptive to new ideas. They work well independently but also with others. They are equipped to participate constructively in society and the economy – locally, nationally and globally.	**Engaged** intellectually, professionally and socially, ready to make a difference. Cambridge teachers are passionate about learning within and beyond the classroom, sharing their knowledge and skills with teachers in the wider educational community.

Figure 3: The planning process



4.4 Teaching skills and content

Cambridge programmes are designed to develop and consolidate student understanding of the subjects they are studying. This requires students to learn content knowledge, develop conceptual understanding and the skills needed to apply their understanding and solve problems. Skills are related to specific contexts and tasks and are developed through, and embedded in, subject content knowledge. The more demanding the qualification level, the more complex the material and the deeper the level of understanding students will need to demonstrate. Higher-order thinking skills are identified in Cambridge syllabuses and include analysis, synthesis and evaluation based, for example, on Bloom's taxonomy of educational objectives (Bloom et al 1956).

The development of understanding, supported by complex thinking skills, takes considerable time and practice. Skill development always occurs in a particular context and is not easily transferred from one situation to another even within a particular subject. When learning something new surface understanding needs to be developed first, including basic knowledge and simpler skills, before the student can proceed to more complex tasks. One implication for teaching and learning is that a spiral curriculum, where students frequently re-visit concepts and practise their skills at higher levels and in new situations, will help both consolidate and develop student learning. This is the approach Cambridge International supports.

Content and skills are described in syllabuses. These, together with specimen papers, teacher support materials and mark schemes, inform teachers about Cambridge curriculum and assessment standards. Understanding how Cambridge assesses student understanding, identifying what constitutes excellence in a particular qualification, is absolutely critical to effective teaching. It is vitally important that teachers new to Cambridge develop their understanding of Cambridge programmes and standards, not only through familiarising themselves with the materials Cambridge International provides but also attending subject-specific Cambridge professional development.

Cambridge teacher support material also provides important information to teachers and gives guidance about how the Cambridge learner attributes can be developed. Developing the learner attributes supports students to become independent and effective learners, thereby also improving their ability to perform well in Cambridge assessments.

Interdisciplinary curriculum mapping

It is essential to establish coherent and consistent planning processes to deliver Cambridge programmes. In addition some schools choose to go beyond this and map inter-disciplinary links between subjects. This involves horizontal planning across a particular year group to consider the relationship between what a student is learning in all their subjects at a particular point in time. In this way teachers can help students make connections between what they are learning in different subjects. This reinforces learning and helps students to see that human knowledge and understanding transcends individual subjects.

Coordinating the different schemes of work teachers are using enables cross referencing. In history a topic being taught might link up with a book being studied for English. The maths teacher might agree to teach a topic, for example statistics, at a time that reinforces what the science, business studies, economics or geography teacher is teaching. The possibilities are endless.

Interdisciplinary planning is often coordinated by a head of year who is responsible for examining the curriculum across all subjects and helping to establish links. Curriculum-mapping software is available that helps teachers view what others are planning and consolidates the whole curriculum. The results can then be examined for meaningful links.

Curriculum mapping does not need to be complicated. It is better to make a few meaningful links than to try and force links that are not natural. Another approach that can be adopted instead of, or together with, curriculum mapping is providing time in the calendar or timetable for students to work on interdisciplinary projects, facilitated by their teachers.

Cambridge Global Perspectives®, at both Cambridge IGCSE and Cambridge International A Level, is specifically designed to help develop interdisciplinary

understanding. By studying global issues, learners explore different and often opposing perspectives to develop critical thinking, research, communication and collaboration skills. The learner develops an informed curiosity and understanding of the world, becoming more able to transfer these skills to their other content-based subjects.

4.5 Developing a culture of reflective practice

Experience alone does not necessarily lead to learning; deliberate reflection on experience is very important (Loughran 2002, p. 9). Through reflection, learners can translate experiences into deeper learning that improves their overall effectiveness as learners. In Visible Learning (2009, p. 22), John Hattie argues that the "… biggest effects on student learning occur when teachers become learners of their own teaching, and when students become their own teachers". The self-regulatory attributes that Hattie argues are the most effective for learners, such as self-monitoring, self-evaluation, self-assessment and self-teaching, are also essential for teachers as learners.

In the reflective classroom the processes, as well as the products, of learning become an object of attention (see table 5 for some examples of teaching strategies that promote reflection). Teachers actively encourage learners to take time to step back and to:

- reflect on what they have learned
- compare intended and actual outcomes
- evaluate the strategies they have used
- establish and analyse connections and relationships with other areas of learning
- create meanings
- think about how to apply what they have learned to new situations.

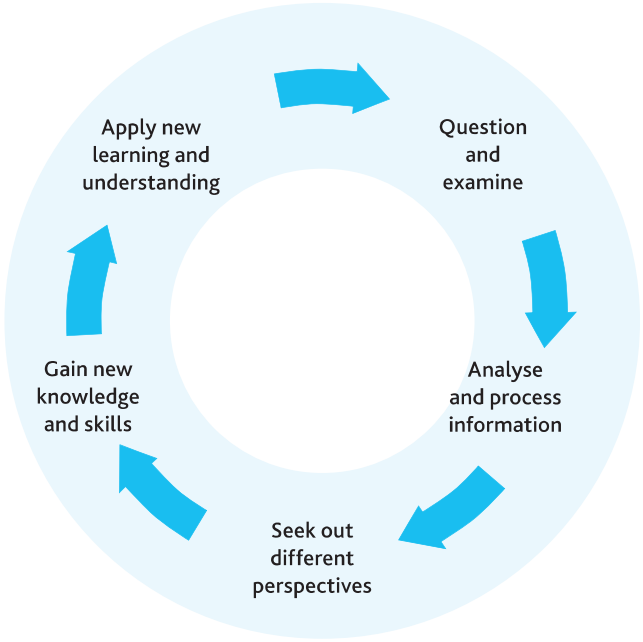
Table 5: Some strategies for promoting the attitudes and skills of reflective learning with students

Reflection on assessment criteria. What does excellence look like?	Share the intended outcomes and success criteria with learners so that they can assess their own progress towards the objectives.
Scaffold learners' responses	Push learners to think more deeply through targeted questions and prompting.
Revisit, review and consolidate learning	Review learning and progress regularly, including providing opportunities for learners to restructure their newly acquired skills, knowledge and conceptual understanding into further evidence of learning, for example, short presentation, essay, revision notes.
Silent thinking	Give learners time to think and reflect independently before asking them to comment or to write in their log or journal about what they have learned from the activity undertaken.
Teacher models reflection	Teachers can help learners by sharing their own reflections on what they have learned from an activity, lesson or unit of work and so model the reflective process, including listening skills; thoughtful, exploratory questioning; and deep thinking.
Learner self-evaluation and/or Learning logs and journals	Ask learners to write a self-evaluation as part of the reporting process, explaining: • what they have learned about how they learn • what they need to do in order to improve • what challenges they have encountered • how they might overcome these. If used on a regular basis, learning logs and journals build in an expectation that the learner will reflect regularly, not only on what they have learned, but also on what they have found challenging, and strategies to improve learning.
Create steps towards problem solving	Involve the whole class in reflecting on the steps they took to solve a problem set and then 'build a ladder' of steps for the next time they undertake a similar activity.
Interviews	These might be peer-to-peer or teacher-to-learner interviews. They not only encourage learners to share reflections but also help to develop learners' skills of active listening, questioning and communication as well as deep thinking. This type of activity is particularly successful if the teacher models the thought process and encourages the whole class to design examples of effective questions to ask before learners engage in interviews themselves.
Reflective conversations	In small groups, pairs, or as a whole class, discuss the processes in which learners have been engaged. Teachers might ask learners to share their thought processes, detail the problem-solving strategies they used and reflect on the strategies to assess their effectiveness before reporting back to the whole class. These conversations should encourage learners to listen actively and to learn from others' reflective practices.

Reflective teachers constantly question, analyse and self-evaluate their effectiveness as teachers and use this to identify new knowledge and skills they need (see Figure 4). They ask themselves questions including:

- What worked in this lesson/unit of work?
- How do I know? What sources can I use to provide me with information?
- What would I do the same, or differently, if I was planning and teaching this lesson again? Why?
- What new knowledge or skills do I need to make improvements?
- How will I gain these? Research? Collaborate with other teachers?

Figure 4: The reflective cycle



Providing teachers with opportunities to reflect on practice, discuss their learning, learn from each other, and develop knowledge and skills collaboratively helps to foster this supportive climate for reflective practice that is so important for professional learning. Possible ways to encourage this practice may include:

- promoting a 'buddy' system for teachers to reflect and learn in pairs
- establishing cross-subject teaching and learning study groups, with sharing reflection on practice included as a regular agenda item
  encouraging specialist subject teachers to meet weekly or at the end of each unit of work to reflect on experiences together and to plan for improvements
- peer planning, observations of classroom practice and evaluation
- small-scale classroom studies of different teaching strategies and skills for promoting reflective learning
- developing case studies about the attitudes and skills of teachers and students as reflective learners.

Reflective teaching requires teachers to evaluate their own strengths and areas for development. This can be the starting point for creating a personal professional development plan (see Chapter 7). This process is also an integral part of the teacher evaluation processes that we consider in detail in Chapter 6. If teachers are used to the practices of reflection, self-evaluation and planning for improving their skills, they are likely to be more comfortable with, and supportive of, these practices as part of teacher evaluation systems. Personal professional development plans will also be useful when coaches work with teachers to help them concentrate on, and track progress against, identified and agreed areas for improvement.

4.6 Differentiated learning

"*Differentiation doesn't ask teachers to begin by individualizing instruction. In other words, it doesn't call for teachers to create 20 tasks for 20 students who will come to class tomorrow. It asks teachers to look for patterns of need*" (Tomlinson 2010).
One question that is often raised by Cambridge teachers concerns how to stretch all students in a large class, meeting the needs of the less able as well as the talented at the same time. How can teaching and learning be differentiated so that every student is working at their level, given work that is challenging for them but achievable given

their current level of understanding? There is no easy answer to this question. Cultural influences and expectations have a powerful influence on what happens in classrooms. Every school and every teacher must engage with this question because it is an important expectation in lesson planning and teaching that all learners can achieve their full potential.

Differentiated learning is characterised by having challenging objectives, ambitious individual and class targets, accurate, regular and robust assessment to check, track and support learning followed by prompt and targeted intervention where needed. Teachers should use ongoing formative assessment to identify learners' needs and to refine their teaching to meet these needs as learners change and develop. The following practices can be helpful in supporting differentiated learning:

- Use a variety of teaching strategies and approaches to engage all learners.
- Design activities that are interesting, stimulate deep thinking and challenge learners.
- Check learner progress on an ongoing basis and adjust strategies in response.
- Plan different ways for learners to engage in and demonstrate their learning.
- Try to include 'real-world' applications for what learners are learning.
- Use different groupings as appropriate e.g. whole class, small groups, pairs, individual, and change these as needed (flexible grouping).

It is possible to support differentiated learning during whole-class instruction provided all students are engaged. The reality in many classrooms is that teachers constantly select the same students to contribute to classwork. These students tend to be the most enthusiastic and confident. It is critical to develop a culture of learning in which all students understand that everyone's voice is important and incorrect answers are nothing to be embarrassed about. Through listening to students, as well as assessing their written work, teachers will be able to identify patterns of need.

Teachers should vary whole-class instruction with smaller groupings of students. These can be particularly useful for making learners more confident in working collaboratively. They might include:

- **Grouping according to need on a short-term basis.** For example, a teacher may group in order to address learners' specific reading or writing skills and strategies.
- **Structured or random grouping.** This makes sure that learners work collaboratively with different learners in the class to experience a range of views and opinions beyond their friendship groups.
- **Paired working to facilitate discussion.** One example of this is 'think, pair, share', where learners are given time to think individually. They then join with a partner to discuss and develop ideas, and finally share with the whole class.
- **Short-term regrouping across a whole grade or year group.** This allows choice and increases motivation, or makes the best use of teachers' strengths. For example, in physics, classes might be regrouped for a few weeks to study a particular unit with a teacher who has a particular interest and greater expertise in this area.
- **Guided learning groups.** This is where teachers target their support to small groups within the classroom and 'guide' their learning. A teacher will usually plan guided sessions over a sequence of lessons to make sure that all learners benefit from the approach. The approach can also be used to respond to immediate needs by intervening at the point of learning. For example, it may become clear through formative assessment that a group of learners has a particular barrier to learning that needs to be addressed. Teachers will, of course, need to make sure that they provide other learners with appropriately challenging work and a range of resources and self-help strategies to support them. It is also important that all learners are given time to reflect and then report on their learning and progress in the whole-class session.

When supporting teachers to plan for differentiated learning it is important to consider whether the learning environment is flexible enough to allow a wide range of teaching and learning activities. Are there areas in the classroom or corridors to provide working spaces for independent work or pairs? Do learners and teachers have easy access to learning resources? Can the furniture in the classroom be rearranged easily to allow for small-group working? Schools and teachers must create stimulating learning environments that support and promote active, differentiated learning.

4.7 Teaching with new technologies

Existing and emerging technologies can provide many stimulating opportunities to enhance active learning. However, they need to be carefully planned like any learning activity. In the information technology enabled classroom, providing additional sources of knowledge and information means learners are less dependent on the teacher. They

can use the technology to control and pace their own learning, taking an active role. They are able to make choices and decisions independently and collaboratively.

A critical competence that learners will need to develop in order to use technology effectively and wisely is information literacy. This is the ability to evaluate information and online material for its usefulness in answering particular questions, and use it in their own work in appropriate ways. One common mistake in classrooms is that teachers do not spend enough time helping students develop this competence, assuming everyone knows how to use the internet. Information literacy is an interdisciplinary skill. It can be supported simultaneously by a number of teachers in different disciplines teaching the same skills and expecting the same standards. Having an information technology policy will help identify responsibilities in this area. It should identify clear expectations, supported by an information literacy curriculum taught by a number of different teachers.

New technologies can be used to support teaching and learning by:

- giving learners more control of their own learning, more opportunities to set their own goals and providing support for reviewing and assessing their own learning
- providing opportunities for learners to learn in alternative and challenging ways, using a wide range of sources of information and techniques to support critical thinking
- providing additional opportunities for learners to demonstrate evidence of learning, for example a blog entry, wiki creation and use of multimedia
- providing vivid examples of 'real world' situations for learning that increase student engagement
- providing primary sources of data
- helping learners to work collaboratively, even when at a distance from their peers
- helping teachers to view, assess and provide feedback on learners' individual and collaborative work, in school and at a distance
- helping learners to see patterns and behaviours more clearly
- helping teachers to facilitate whole-class discussion regarding first-hand observations, and encouraging learners to consider issues raised by their observations within a wide range of contexts
- helping teachers to collaborate to improve schemes of work, unit plans and lesson design
- helping teachers to support learners to review, refine, re-draft and modify work in progress
- helping learners to improve their attainment through refining and presenting their ideas more effectively and in different ways
- supporting teachers and learners to improve their presentation of work.

There are also many advantages of using new technologies for teachers' own learning and for the support they give to learners. It is easy for teachers to share resources, expertise and advice with other colleagues within a school, between schools or even internationally, using online professional communities and social media sites. Using technology to interact and share resources can make sure that planning for active learning and its assessment is thorough and effective without taking too much teacher time. Teachers can design web-based assignments for schemes of work and unit plans collaboratively, and build formative and summative assessments into these. They can record electronically a learner's assessment data, the feedback the teacher has given, and the action the learner has taken in response. This makes tracking learner progress and setting individual and group targets for learning easier. Teachers and learners can email classwork and homework. Video-conferencing between schools can support student and teacher learning.

There are pre-conditions for using new technologies in and beyond the classroom. The most fundamental is that a fast, reliable internet connection is essential. It also requires learners and teachers to have easy access to new technologies, and this can be costly for the school. However, the use of BYOD (bring your own device) and low-cost tablets, and the availability of the cloud network (which eliminates the need for software installation, servers and local file storage) can help to reduce the impact on the school's budget.

5: Improving student learning through assessment and feedback

For assessment systems to enhance learning – and not just measure it – students need to be at the centre of the assessment framework. To become lifelong learners, they need to be able to assess their own progress, make adjustments to their understandings and take control of their own learning. (OECD 2013, p 220).

Excellent schools give a great deal of attention to improving the quality of their assessment practices. Assessment is not only critical in measuring achievement standards. It also helps students understand their own strengths and limitations, and know what they need to do to improve. Because of its significance to learners, teachers and parents, it is important to have a clear assessment policy.

This chapter looks at assessment that is used to support learning. This includes feedback teachers give to students in day-to-day interactions as well as marks, comments and reports they produce. A section of this chapter looks at how teachers can provide valuable oral and written feedback to students. Feedback that teachers get from students' comments in class and work is critical in helping them understand how the learner is thinking. Assessment information needs to be recorded and tracked in a way that is meaningful.

This chapter suggests that criterion-referenced reporting against clear learning and assessment objectives is a good approach that helps make learning progression understandable. Teachers need to be sure they have a common understanding of assessment standards so we briefly consider standardising teacher assessments. Using assessment data is important for the school development planning process as well as reporting to parents and other stakeholders.

5.1 Developing classroom assessment practice

Assessment is central to the teaching and learning process in the classroom, not only to measuring student achievement and progress. The following different uses of assessment are often distinguished:

- **Formative –** assessment activities which are used primarily to help student learning by providing feedback during the learning process. This enables teachers and/or learners to modify teaching and learning activities to improve learning.
- **Diagnostic –** activities which identify learning difficulties or issues and indicate where help or change is needed.
- **Summative –** an assessment of learning that has taken place at the end of a course or unit of study. This is designed primarily to measure achievement but could also involve ranking, certifying competence or accountability.

Harlen (2012, p. 98) believes it is better to describe assessment purposes and practices as a dimension. At one end are informal formative procedures which directly influence the next steps in learning. These are characterised by immediate feedback as a normal part of classwork, and usually not planned in advance. This broadly corresponds to **assessment for learning** in the sense Swaffield (2009, p. 8) describes: "*Assessment for learning's prime concern is with the here and now of learning. It occurs in the flow of activity and transactions occurring in the classroom. The focus is on the learning of these students now, although there is also consideration given to their learning in the*

future." Formal formative processes are more structured. An example might be a brief test planned for the whole class, with feedback into the teaching of that class. Informal summative assessment might be a more structured process that is primarily used to monitor progress. Formal summative assessment would be a higher-stakes text or exam. The distinction between formative and summative is largely based on considering what the assessment is used for. In practice, summative assessments that are primarily designed to assess learning at the end of a learning episode can, and in many cases should, be used formatively as well.

A further important consideration is raised by Carless (2011). He points out that more ambitious interpretations of formative assessment aim to help students accurately evaluate their own work, develop motivation, metacognitive awareness, self-regulation and independence. He describes this as extended formative assessment. Restricted formative assessment, in contrast, has the more limited purpose of feeding back into the teaching and learning process relating directly to the course of study and assessment expectations.

Carless argues that how far the more ambitious extended aim can be implemented will depend very much on the school context and culture. Schools need to be sensitive to this:

"Although extended formative assessment is more theoretically desirable than restricted formative assessment, it risks being viewed by some teachers as too difficult to implement within their own educational setting because facilitating factors are not in place ... when pedagogy is dominated by testing then formative assessment needs to take credence of that reality" (Carless 2011, p. 107).

This is a very good example of how schools need to consider their own context in terms of prioritising developments. Consider the example of a school working in a culture where the existing pedagogy is predominantly direct, teacher-led instruction, and pressure on teachers and students is for immediate good test results. A more effective and realistic strategy will be to focus initially on restricted formative assessment and do this really well. This presents a win–win situation as the formative assessments will be designed to support learning that will result in good summative assessment performance. As assessments are designed to test a broad range of higher-order thinking skills, students will still need to understand the specific assessment criteria, their application and their own performance in relation to this. They will at least start to develop a more sophisticated understanding of what constitutes excellence in a particular discipline and what they need to do to improve. Developing good restricted formative assessment practice over time will then make it possible for this to be more ambitious and extended in the future. Trying to move too quickly may alienate teachers and parents, and slow progress.

Assessment for learning (or informal formative assessment) involves activities that support the learning that occurs naturally in class. It is a continuous process and should be viewed as an aspect of effective teaching practice. More structured formative assessment activities and summative assessments that are also used formatively need to be regular and planned in schemes of work and lesson plans. Teachers always need to be clear about how they will review and use the resulting data before the assessment takes place.

5.2 Assessment policy

Because of its critical importance, a whole-school approach to assessment should be adopted that involves teachers, learners and, where meaningful, parents. This approach focuses on developing a clear understanding of the purposes of assessment and the values, practices and procedures the school uses.

Developing and implementing a whole-school policy for assessment will help to ensure that systems for assessing learning have an impact on the quality of teaching and learning across the school, and are understood by teachers, learners and parents. One important first step is to agree a common understanding of different types of assessment and how they can be used effectively to promote learning in each classroom. It may also be necessary and desirable to engage in further research and in whole-school training for the effective use of assessment to support learning.

An assessment policy should provide the structure for the school's approach to assessment. It will identify the framework through which learners' progress can be monitored, summarised, recorded and reported. It also needs to overlap with the school's policies for teaching and learning, and the policy and procedures for marking and reporting.

A typical policy for assessment will include:

- a brief explanation of the purpose of assessment and uses of assessment
- a clear statement about what is valued in assessment – this should include reference to broader educational objectives, including the development of the Cambridge learner attributes
- what learners should expect from assessment
- planning for assessment
- assessment processes
- responsibilities (who needs to do what)
- guidance on marking and providing feedback to students
- guidance on reporting, providing feedback to students and parents
- the school's marking policy
- guidance on portfolios of work
- details of which assessment data will be shared with parents, in what format and how frequently.

The policy should also be accessible to key stakeholders such as parents, who will want to understand how their children will be assessed or evaluated (see Chapter 3 on school policies).

5.3 Supporting student learning through formative assessment

Well-designed and applied formative assessment has a significant positive impact on learners' motivation and achievement. It also supports their ability to work independently. In a good school, formative assessment will be embedded in day-to-day classroom practice. Where this is the case, learners have a clear understanding of what they are learning as well as the standards towards which they are working. There are frequent discussions about how students' work meets assessment criteria, both between the teacher and learners and between the learners themselves. Specific and clear feedback helps learners to understand and evaluate what they have done to meet the criteria so far and what they need to do next. Students are encouraged to become reflective, curious learners, confident in assessing their own and others' progress, knowing that they will be supported in their next steps to achieve the standards set.

Formative assessment activities will range from very informal but rich interactions, for example a student going over their work with a teacher, receiving verbal feedback, to more structured assessments, for example unit tests. Classroom assessment should be:

- **Relevant –** relate directly to the learning objectives and the course and syllabus standards.
- **Appropriate –** give the information that is required. Teachers will almost certainly need to use a variety of methods to assess different assessment criteria and learning objectives.
- **Fair –** assume that all learners can make progress, regardless of their starting point, and provide them with the opportunity to demonstrate what they know, understand and can do.
- **Reliable –** provide an objective and accurate check of learners' skills, knowledge and understanding at the point of assessment.
- **Informative –** establish where learners are in their learning, i.e. what they already know, understand and can do. This information should then be used to diagnose what each learner needs to improve and how the teacher can support this. Where this information is gained during a lesson, it may lead to immediate changes to the lesson plan. Or, where it is gained from a series of lessons or unit of work, it may lead to revisions in course plans or schemes of work.
- **Integrated into the lesson and teaching and learning cycle –** the reflection on learning and progress by learners and teachers will provide evidence that guides the next steps to be taken and provide motivation for future progress in learning.
- **Manageable –** assessments should be integral to classroom activities. The recording of these assessments needs to be time efficient and the information provided needs to be valuable for improving learning.

Table 6 provides examples of some teaching and learning strategies that support assessment for learning. In addition to ongoing feedback on class activities, assessment tasks need to be selected that provide an accurate understanding of learners' current strengths, limitations and needs. Teachers will need to collect assessment data from a range of appropriate activities and tasks – this will depend on the subject being studied and the level of the programme. These are likely to include class tests, student written work completed at home and/or in the classroom, student responses to structured

questions, oral responses, project work, portfolios, presentations, creative work and exhibitions.

5.4 Using assessment data to improve learning

Using multiple sources of evidence/assessment data helps to 'triangulate' data. This means that evidence from different sources is compared to generate a richer and more accurate picture of students' understanding (see Figure 5). This can be particularly useful for developing hypotheses and educated guesses for what approaches may be most effective for the next stage of learning.

The two examples 5A and 5B illustrate how triangulating data can help teachers to identify students' needs and prioritise what to do next. Using summative test data formatively, to identify where learners performed well and where more depth of understanding is needed to improve attainment, helps teachers to recognise how they might need to adjust lesson plans, unit plans and schemes of work. Using a variety of data from classroom assessments as well, teachers can be more confident in deciding what needs to change in order to improve learning. Whenever changes to curriculum plans, or to teaching strategies teachers use to deliver those plans are made, it is important to review and evaluate the success of those changes.

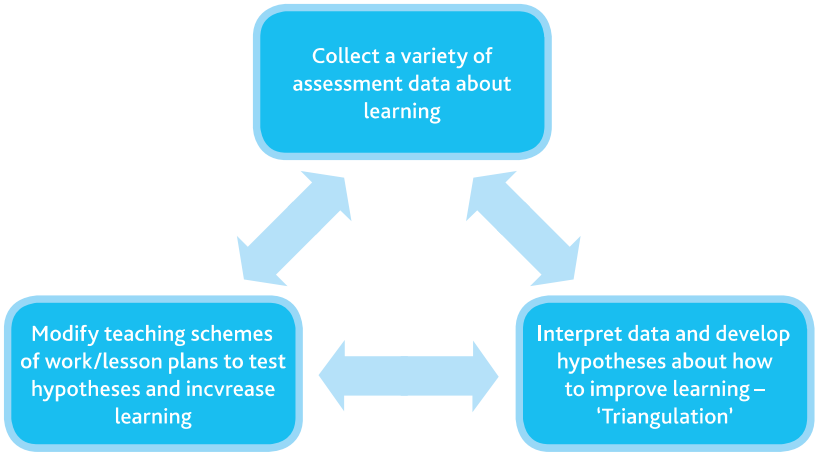
Table 6: Examples of classroom practices and assessment in support of learning

Characteristics of classroom assessments	Teaching and learning strategies
Teachers recognise that assessment for learning is integral to and an essential aspect of teaching for learning. They understand that it provides learners with the skills and strategies to take the next steps in their learning and plan their schemes of work and lessons accordingly.	• Integrate assessment activities into schemes of work. • Plan each scheme of work, series of lessons and individual lessons backwards: – Identify what learners need to be able to do with what they will learn – the learning goals or priorities for this unit of work. – Decide how you will know that learners have achieved the learning goals set – the evidence that you need and the methods for gaining this. – Plan the learning experience – the scheme of work, unit plan, individual lesson, or the next episode in the lesson. – Plan the points for and methods of assessment.
Teachers share learning objectives (learning intentions) with learners.	• Share clear and age-appropriate learning objectives at the beginning of the lesson/series of lessons and, where appropriate, during the lesson. • Use these objectives as the basis for questioning and feedback during the lesson and at the end. • Evaluate learner progress against the learning objectives for assessment of learning and for informing the next steps for learning.
Teachers establish what learners already know through classroom activities that show evidence of learning.	• Refer to individual learner assessment data, including records of feedback on previous work and actions taken by learners in response. • Use a 'recall' question-and-answer session to check prior learning with strategies such as: – Each learner is provided with a mini white or blackboard so that they can all respond to a question at the same time when prompted. Teachers can see at a glance who has the knowledge and who needs further support. – "Here's the answer, what's the question?" e.g. "The answer is 42. What could the question be?" This strategy can quickly encourage learners to think more deeply and to make connections. – Use questions that require higher-level thinking and allow time for this thinking before accepting any answers, e.g. instead of "Draw an isosceles triangle", ask learners to "Draw four different triangles. Now explain what is similar and what is different between each of them". – Traffic lights or thumbs up to show recall and follow up with questions to check understanding.

continued

Characteristics of classroom assessments	Teaching and learning strategies
Teachers help learners to know and understand the standards they are aiming for by sharing assessment and success criteria routinely.	• Share examples of work that have met assessment criteria with learners and help them to understand why these are good examples. • Give learners clear success criteria related to learning objectives. • Model what a successful piece of work will be like, for example, complete an activity as a whole group. • Make sure that learners understand expectations of the presentation of work. • Display learners' work that is good 'in progress' as well as completed.
Teachers involve learners in self-assessment and peer assessment.	• Encourage learners to talk about what they have learned and what they found challenging in relation to the learning objective as well as the activities undertaken. • Give learners opportunities to work collaboratively and discuss their work, focusing on how they can improve. • Ask learners questions that encourage them to explain their thinking, e.g. "Can you tell the rest of us how you got to that answer?" • Make sure it becomes commonplace for learners to reflect on what they have learned. • Identify with learners the next steps in learning.
Teachers provide prompt oral and written feedback on learning that leads learners to recognise what they need to do next and how to do it.	• Value information on learner progress provided by oral feedback as well as written. • Make sure feedback is constructive, specific to each learner (does not make comparison with other learners) and identifies what the learner has done well in addition to what he/she needs to do to improve and how to do it. • Provide time and support for learners to act on the feedback given. • Identify the next steps in learning for groups and individuals.
Teachers promote learner confidence and make it clear that all learners can improve and will be supported to do so.	• Identify small steps for learners so that they can see their own progress and gain confidence as a result. • Create a classroom environment for learning that is supportive, where a wrong answer is turned into an opportunity for learning, where thinking and exploration is highly valued and where learners are encouraged to take risks.
Teachers reflect on, review and evaluate assessment data with learners.	• Choose learning activities that provide quality information, with an emphasis on process rather than just the outcome. • Encourage learners to reflect on the process of learning with other learners and with the teacher. • When planning lessons/units of work, build in time for learners to reflect on their learning, and to recognise where they are less secure. • Adjust schemes of work/lesson plans/resources in response to information provided by assessments. • Encourage learners to be owners of their learning.

Figure 5: Using assessment data to improve teaching



The two examples 5A and 5B also illustrate the benefits of teachers working collaboratively in collecting and interpreting assessment data. Benefits include:

- refining and developing effective teaching strategies and practices over time
- receiving feedback from others about tentative conclusions reached and how best to proceed
- establishing common assessment practices
- establishing common expectations of learner performance
- developing understanding of the needs of individual learners and agreeing how to support identified needs
- recognising when it is not the teaching strategies that need to be adjusted but rather the curriculum plans that need improving, for example more time needs to be spent on reinforcing a skill, and when it is both.

Example 5A

A teacher shares the learning objective with her class: "We will be able to recognise layers of multiple meaning in a text". She then hands out the short text that will be the focus for the lesson, which has some highlighted and annotated examples to help learners understand what they need to do. The teacher also discusses one of the examples and asks if everyone understands what they have to do. The teacher divides the class into small groups of mixed prior attainment, allocates each group a different paragraph from the text and tells them to highlight and annotate the text to demonstrate their understanding of the learning objective. Each group feeds back their points to the rest of the class and the outcomes are such that the teacher believes that each group has understood the learning objective and is ready to apply it to a different text.

However, an assessment of written work completed individually shows that most learners do not yet have sufficiently deep understanding and skill for them to take the next steps in their learning. When she shares the assessment information with other teachers who are teaching the same topic with the same grade, it is clear that most learners in other classes have achieved the learning objective and are ready to take the next steps in the scheme of work. The teacher forms a hypothesis as a result. She identifies that she needs to amend her teaching strategy for this learning objective to include more effective modelling and more prepared higher-level teacher questioning. After including these strategies in the next two lessons, she again assesses learners' understanding and skill through asking learners to analyse two short texts from different media. This time, all learners in the class demonstrate that they are able to recognise layers of multiple meaning and have applied their learning to two, previously unseen texts.

Example 5B

The teacher shares the learning objective with the class: "To understand the effects of water flow on the landscape" and uses enquiry-based, practical activities and some short film sequences to embed students' understanding and learning. In a question-and-answer session, learners demonstrate that they all understand and that most can apply what they have learned. The teacher then sets a second task to assess learners' progress towards achieving the learning objective. He asks learners to work in small groups to make a presentation for the whole class that demonstrates the effects of water flow on the landscape, and gives each group clear criteria for success against which they will assess themselves and be assessed by their peers. The self and peer assessments provide evidence of learners' understanding and ability to apply that understanding.

In the next lesson, the teacher sets a summative test taken from past external examination papers, which includes the topic studied. The written responses to the questions asked in this test reveal gaps in learners' knowledge and understanding that were not evident in the classroom-based assessments. When the teacher shares the assessment data and his experience with other subject teachers who teach the same topic and the same grade, their data and experience are similar. On this triangulated evidence, the team of teachers recognises that in-class assessment data provides evidence of progress against the learning objective set. This would suggest that it is not the teachers' delivery that is resulting in gaps in knowledge and understanding. They therefore form the hypothesis that the weak performance of learners in response to the external assessment task set suggests that the unit plan is not sufficiently detailed to support teachers in their delivery of each aspect of this unit of work and that they need to revise it.

5.5 Providing feedback on student work

Giving specific and clear feedback to learners on their work helps them understand their performance and what they need to do next. Feedback also helps students understand the standards against which their work is being judged, enabling them to become better in future at judging their own performance. A better term for the guidance given to students to help them improve their work is 'feed forward'. This is because it is about providing effective feedback to help the learner improve their next pieces of written work – to prompt them to think about 'What's next?' As Hattie and Timperley (2007, p. 86) argue, effective feedback should answer three questions for the learner: 'Where am I going?', 'How am I going?', 'Where to next?'

Feedback works in three directions:

1. **Teacher to learners** – the teacher gives guidance to learners about their current achievement and the next steps they need to take.
2. **Learners to teacher –** the teacher receives feedback from learners about their learning.
3. **Learner to learner –** peer assessment.

All of these are important. Peer-to-peer assessment against clear criteria can be highly effective in helping learners to understand what they need to do to improve their work as they analyse other learners' work. It is also important to appreciate that feedback is not a one-way process. John Hattie (2009) believes that the most powerful feedback is given from the learner to the teacher as it allows teachers to see learning through the eyes of their students. In the previous sections we considered how classroom assessment processes can support this direction of feedback.

Teacher feedback on student work needs to be:

- **Focused –** it should include two or three areas for improvement, referenced to the learning objectives.
- **Accessible –** it should be given in language that is appropriate for the age and competence of the learner. It should be unambiguous and clear.
- **Constructive –** it should include specific guidance for improvement and point towards the relevant criteria for success.

- **Supportive –** it should be given in a positive tone and make clear the support that is available for the learner.
- Related to learning objectives and success criteria that have been shared with learners.
- **Challenging –** it should encourage the learner to think more deeply about what and how they are writing.

Giving oral feedback

Oral feedback is the most regular and interactive form of feedback, and can be a highly effective way of helping learners know what they need to do to move forward with their work. It can be targeted to individuals or groups but has the advantage that others can listen to what is said and learn from it indirectly. Oral feedback is usually spontaneous, but teachers should recognise that it needs to be detailed, personalised and provide the information learners need for it to be effective. So, developing approaches to giving oral feedback, and planning explicitly for its use within a supportive learning environment, are important to achieve its potential as a powerful tool for improving learning.[1]

Oral feedback has some advantages over written feedback. It is:

- **Immediate and specific to the context –** misconceptions can be dealt with as they occur and in the context of the specific learning.
- **Dynamic and adaptable –** encourages discussion of ideas and can be adapted to respond to particular learning needs.
- **Ongoing –** a continuous and regular part of a lesson. It can also be used for transitions between learning episodes and to structure learning with reference to the objectives woven through the lesson.
- **Versatile –** questioning, modelling and explaining can all be used as strategies to provide feedback.
- **Stimulating and motivating** – learners enjoy immediate feedback and quick improvements can be made as learning is fresh.
- **Personalised –** facial expressions and positive body language enhance constructive advice.

1. In their study of oral feedback that examined 3000 reports, covering nearly 13 000 learners, Kluger and DeNisi (1996) found that oral feedback raised achievement in 60 per cent of cases, but in 40 per cent was ineffective. The challenge for teachers is to make their spontaneous oral feedback more specific and to encourage deeper thinking and learning.

The effectiveness of oral feedback can be improved by:

- making feedback both positive and developmental
- relating feedback to the learning objectives – and making sure the objectives and outcomes have been explored thoroughly when introduced
- establishing a supportive environment for learning so that learners want to share their thinking process with others and recognise that self, peer and teacher feedback helps them to identify ways they can improve
- encouraging learners to take risks and welcome challenge so that they do not always choose the easiest option and recognise that making mistakes provides learning opportunities
- planning learner groupings in advance to support the use of oral feedback, e.g. using guided ability groups for giving feedback on previously completed written work; using paired work for peer assessment followed by teacher feedback
- building in 'wait time' before and after questions or responses to encourage learners to think deeply and to expand on their response – and let learners know that you will do this routinely. Often teachers, or other students, talk on behalf of students who are being questioned if they do not respond immediately
- providing red, amber and green flashcards for learners to indicate the extent to which they understand the current learning objective
- encouraging other learners to reflect and question or comment before the teacher responds, then to use the appropriate specific learning outcomes/success criteria to assess their own and other learners' responses
- using prompts such as, "Can you say a bit more about that?" in order to make the process developmental and to modify feedback as appropriate
- targeting questions at specific learners and not just responding to students who put their hands up to answer, thereby ensuring everyone participates
- planning questions and tasks carefully to encourage higher-level thinking and responses so that feedback also contributes to progress in learning
- building in time for giving extended or structured feedback to individuals or small groups with similar needs, as appropriate

- encouraging learners to reflect on the feedback then to act upon it in the lesson, e.g. through revising their work, and giving them time to do this
- checking back on actions taken in response to feedback to make sure that learners have understood and are making use of what has been said
- using learners' work to exemplify feedback (examples are often easier to understand), and encouraging learners to do the same
- thinking about offering coaching sessions to individuals or small groups to follow up feedback.

Giving written feedback

Traditionally, teachers spend hours marking learners' written work, correcting spelling and grammatical errors, and providing marks and comments. What matters is the quality and nature of this marking. The value of much marking in many classrooms is very limited. It can even be counter-productive if learners find it difficult to make sense of the grades and comments, and become discouraged and unsure of themselves. Learners also tend to focus more on the mark or grade and ignore comments made by the teacher.

When marking learners' written work, providing selective high-quality, detailed and informative marking will improve learning much more than superficial marking for all learners on every piece of work. As Black and Wiliam concluded (1998, p. 9):

"Feedback to any pupil should be about the particular qualities of his or her work, with advice on what he or she can do to improve, and should avoid comparisons with other pupils", and "Feedback has shown to improve learning where it gives each pupil specific guidance on strengths and weaknesses, preferably without any overall marks."

Principles and practices that define expectations for marking and written feedback need to be developed as part of the school's assessment policy. These should stress that:

- The learning objectives and learning outcomes should be used as the points of reference for written feedback and so should be shared and explored before learners attempt the task. Include assessment criteria in schemes of work and unit plans. Teachers must check that learners understand these.
- Feedback is given in relation to learners' performance against learning objectives and assessment criteria, and not the work of others.
- Written feedback should provide clear evaluation of learners' strengths and identify areas for improvement. It should prompt learners into deeper thinking and identify the next steps they should take.
- Teachers need to identify the next steps for learners. Focus on two or three points for improvement that will help to bridge the gap between present performance and future targets. This will require a good understanding of subject progression, described in scheme of work documents.
- Teachers will need to diagnose learners' misunderstandings and difficulties. These are likely to require further action and support, which they need to facilitate or seek extra help for.
- Agree the frequency of detailed written feedback in the whole-school policy and share the timings with all learners and parents. Informative feedback on selective student work is better than limited feedback on all student work. Subject areas need to identify the key pieces of work they will focus on.
- Agree how feedback on progress is shared with parents in the whole-school assessment policy.

How marks or grades are used also needs to be agreed. Black and Wiliam (1998, p. 9) believe that when pupils are given a mark, their ego responds and they react emotionally to the score. A lower than expected mark is seen as failure, whereas a better than expected grade leads to students feeling elated and keen to find out if they have done better than their friends. Either way, they ignore the teacher's comments. One effective practice that helps prevent this is focusing on assessment criteria, rather than providing overall marks. Assessment rubrics (tables showing how the assessment criteria relate to levels of student performance) can be extremely effective at showing what excellence looks like and how the student's work measures up to the different criteria.

A key consideration is developing learners' awareness about what they can do to improve their own work. This can be supported by providing opportunities for learners to think things through for themselves, by giving prompts or outlining the process they need to follow. Providing the time and support for learners to discuss, correct and develop their work following initial feedback is a valuable process. However, a balance has to be struck – teachers need to be careful that they are not directing students too much so that the final work is in fact their own.

5.6 Recording and tracking progress and achievement

How and when assessment information is recorded should be a whole-school decision described in the assessment policy. Schools also need to decide how often data should be collected for tracking purposes (sometimes referred to as monitoring). It is important to note that recording and tracking is not the assessment itself but simply a means to help record and recall learners' progress and attainment. Assessment is the *"accurate and usable knowing and understanding of children, not the quantity or form of recorded information"* (Dubiel 2014, p. 9).

Deciding what to track and record is an important decision that needs to be clarified in the school's assessment policy. It will not be easy to measure everything that the school values, identified in the mission or vision statement. The danger with not monitoring or reporting on these broader learning objectives is that they will be valued less. Outcomes that are easily quantified, such as grades, may be prioritised. The challenge for senior leaders, teachers and learners themselves is to decide how they can monitor and track each aspect of learner progress towards objective learning goals, or targets – not just the knowledge and understanding that can be easily assessed through summative testing. The broader the range of assessment evidence, the more valid the judgements will be and the more accurate and valuable the progress tracking.

Another danger is placing too much emphasis on records and reports that compare students with other students (mentioned in the previous section). Students tend to focus on their position and grade rather than on what they need to do to improve. No matter where in a class rank order a student is placed, they can always improve. The highest-placed student may think they are doing very well, when it might actually be the case that they are very able and could do much better. Students lower down the class ranking order tend to be demotivated. The most important function of tracking is to serve the learner's needs by making sure that appropriate support is given for continued progress.

Tracking is useful for:

- providing information on what has been learned, what needs more attention and what needs to be learned
- supporting teachers to plan learning experiences and activities that will meet each learner's needs
- identifying when a learner is not making expected progress so that this can be addressed
- providing teachers and school leaders with information about the progress of individuals, classes, groups and whole grades
- providing teachers, learners, parents and school leaders with information about whether learners are on track to meet age-related expectations
- providing teachers, learners, parents and school leaders with information about whether learners are on track to meet objective learning goals mapped against skills and knowledge, and based on high expectations.

Learners should be encouraged to use assessment data to monitor their own performance and identify their next steps. When learners are supported to use their own achievement data and track their progress, it helps them to take ownership of their own learning and become more independent. They improve their ability to reflect on what they have learned and recognise what they need to do to achieve their next steps. They also feel more in control of their learning outcomes. Teachers can help learners to do this by sharing clear learning objectives, making assessment data easy to understand and use, explaining expectations and assessment criteria clearly and providing specific and constructive feedback promptly.

Recording progress and achievement: Criteria referencing

To track the progress of a class or an individual learner all teachers will have mark books or electronic records of assessments of work set. In many cases these records are numbers, grades or percentages that are of limited use to teachers, or learners, in identifying what students need to do to improve. Grades alone do not help identify the complexity of a task. If a student receives a grade A for a short factual test and a grade C for a long and demanding piece of work, for example an essay, how should the teacher aggregate these? Some recording systems simply treat them as the same and give the student a misleading average – in this case a B – as the final grade reported at the end of a period of learning. For this reason alone recording grades should be supplemented, or better replaced, by more detailed records relating to student performance against specific assessment criteria and learning objectives.

Cambridge teachers will become familiar with the assessment objectives and criteria used. These are described in syllabuses and mark schemes. Attending subject-specific training workshops is also important, particularly for teachers new to Cambridge.

These will help them understand how the criteria are used to derive final marks and ultimately grades. Classroom assessment results should record students' performance and progress against the criteria, which the teacher can then track. Using assessment rubrics can be particularly helpful. These describe a set of criteria and standards linked to assessment objectives and describe different levels of performance in relation to these. The teacher can show the student their performance on the assessment rubric.

The teacher can record marks for performances against different assessment objectives and criteria, and then convert them into a grade at the end of a term or when reports are due. Students and parents will then receive marks relating to the assessment objectives and an explanation about how these are converted into a final grade. They will then understand how the final grade comes from a combination of assessment objectives and related criteria. In this way students can appreciate their relative strengths and weaknesses and understand what they need to do to improve.

Record keeping needs to be manageable, and performance does not need to be recorded after each activity in the classroom. Decisions about how much, as well as what, to record will be described in the assessment policy. It's vital to balance the right amount of information (avoiding excessive bureaucracy/time) with the need to monitor and evaluate the progress of each learner. Many schools will want to record the positive, constructive comments and advice teachers have given to each learner for improvement against the learning objectives and success criteria they have set. One way of doing this is for the teacher to keep a copy (paper or digital) of assessment rubrics returned to students which have been annotated by the teacher with comments.

There are a number of ways to record assessments. Some are more appropriate to specific subjects, and schools need to decide which to use:

- marks derived from assessment criteria relating to assessment objectives recorded in a teacher's mark book or electronically
- assessment rubrics with annotated comments
- a portfolio of a learner's work that has been assessed by the teacher
- the teacher's summary of marks, comments, next steps and advice for improvement
- a summary of achievement and progress, including marks and comments, against learning and assessment objectives. This might include comments by the learner. This would be completed periodically – monthly or termly, even weekly if this can be achieved without taking up too much time.

Processes chosen need to be easily understood by teachers, parents and learners and applied consistently across the school. Records need to clearly relate to what was assessed. They must also help judge achievement against clear criteria and help make comparisons between individual learners and between different groups of learners.

5.7 Standardising teacher assessments within subjects

Standardisation is a process designed to make sure that teachers' assessment of learners' work is fair, consistent and accurate. When used effectively, it leads to a shared understanding between all teachers in a subject area – they know what standards are required in that subject at a particular stage of learners' development, or their age. The most common method for standardising teacher assessment involves using samples of learner work. These help teachers agree on the levels of learning reached against the assessment criteria.

Creating robust systems for standardising teachers' assessment helps to make sure that:

- assessment of learning and attainment is accurate
- each teacher understands the criteria for assessment and applies those criteria fairly and consistently
- the approach to assessment within the subject is consistent as a result
- teachers, learners and parents have confidence in teacher assessments
- assessments are reliable and allow teachers, learners and parents to track learner progress with confidence
- target-setting processes can build on the reliability of learning assessments.

How can teacher assessments within subjects be standardised?

1. Develop assessments and standards criteria collaboratively. When writing schemes of work or unit plans, it is important to link assessment objectives with learning objectives and establish clear assessment criteria. Involving subject teachers, led by experienced colleagues, in developing and agreeing the standards criteria is a good first step. This will ensure that teachers understand and know the criteria, and agree the expectations of learner performance. Cambridge's published guidance helps with this.

2. **Planned standardisation sessions.** Giving teachers time to work together for frequent and regular sessions focused on standardising assessments helps to embed standardisation throughout the school. One effective use of these sessions is for subject leaders to photocopy two or three unmarked pieces of work and distribute a set to each subject teacher together with the assessment criteria. Each teacher assesses each piece independently, identifying the characteristics of the criteria that the work illustrates. The whole team then reviews and evaluates the assessments and comments, before agreeing the refined assessment.
3. **Setting learners a common assignment.** One strategy that can be used for standardisation is for all subject teachers to set learners in the same grade the same assignment at the same point, for example, at the end of a unit. Teachers mark the assignments of their own teaching group (or of a different teaching group) against the agreed criteria. The subject leader or experienced teacher then checks the marking for consistency.
4. **Use the experience and expertise available. I**n many schools, there are some teachers who have years of experience of assessing learners' work in their subject. There may also be some who have had training or experience in examining or moderating outside the school, for Cambridge or for other examining bodies. Wherever there are teachers with such experience, they can take the lead and help other teachers in their subject by, for example, assessing and commenting on pieces of work collected from different learners across a grade or year group. These assessments can be reviewed, discussed, and, where appropriate, refined with the subject team. This will help teachers to understand and agree the standards expected and the feedback that should be provided to learners. They can then be used as exemplar pieces for future assessments.
5. **Build up exemplary assessment material. I**t can be very helpful to teachers and to learners to build up exemplars in the form of subject standardisation portfolios. These can include samples of assessed work, annotated with teacher comments that demonstrate which aspects of the work characterise the assessment criteria. Teachers can use examples from the portfolio with learners in lessons to help them understand how to meet standards set. They can also 'post' copies on the learning wall when appropriate.
6. **Use subject development time to share examples of work.** One effective use of subject development time is to share examples of learner work and to assess these pieces collaboratively. This will help to reinforce a common approach and consistent application. **I**t will also give each teacher confidence in their ability to assess in line with other subject teachers.
7. **Develop a best practice guide.** To support and encourage a consistent approach to assessment across the school, as well as within subjects, it is worth considering developing a guide to good practice in assessment for all teachers. The guide could give detailed information on assessment processes in the school and in each subject area. **I**t would also encourage teachers to share more detailed information than in the assessment policy.

5.8 Using assessment data for school evaluation and target setting

Assessment data should be used as one input into the school evaluation and development planning process. **I**t can help schools understand their students, with a view to improving teaching and learning for all. Assessment data can compare performance over time and identify areas needing improvement. Target setting should be used to support whole-school, subject, and teacher plans to improve learners' performance. This should include:

- using quantitative and qualitative assessment data to focus plans on raising learner performance
- making sure learners' attainment is built upon, with a high level of value added at each stage
- identifying underperformance (of learners or subjects or grades) and focusing teaching on addressing this
- supporting improved learning outcomes for underachieving groups of learners and/or individual learners, and for extending high-performing students.

Curricular target setting helps to achieve this through focusing on areas of the curriculum that need development and setting targets for improved student learning. A curricular target expresses in words a specific aspect of the curriculum as a focus for improvement. **I**t is supported by data. Targets may relate to groups of learners, a class or a whole grade, and be established over medium or longer-term horizons. The target

might focus on quantifiable outcomes, for example: '100 per cent of Grade 11 learners will achieve Cambridge IGCSE English First Language A*–G; 70 per cent will achieve A*–C'. Or, it might refer to more qualitative outcomes, for example: '90 per cent of Grade 7 learners are able to select and justify the appropriate software for presenting information'.

Targets need to be translated into meaningful actions. This will make sure it is clear how they will be achieved and who is responsible, as described in Chapter 2. They will also need to result in changes to the planned written curriculum, schemes of work, and be appropriately resourced.

5.9 Using assessment data to report to parents and other stakeholders

Reports for parents

A school's stakeholders are, in the broadest sense, anyone who has an interest in the school and what it does. Beyond learners, teachers and parents, the governing board and/or school owners will want to know how well the school is doing. The reporting policy, which should be part of (or cross referenced with) the assessment policy, will clarify how reporting will operate. It is important to question the purpose and audience for reports when deciding how they should be designed.

Parents' main concern will be to understand how much progress their child is making. They want to see their child's achievements over the period, and compare their performance to others in the year group and against national and international standards and benchmarks. They will also want guidance on what they, as a parent, can do to help their child improve. Cambridge schools are expected to ensure that parents, as well as learners, understand the curriculum. It is equally important to make sure that parents are involved in and understand the progress that their children are making in school, both academically and more broadly.

As parents will want information related to their own children, the subjects they take and the teachers who teach them, the report will be focused on the individual learner. In addition to reports on individual subjects, include an overall summary commenting on progress across the curriculum. This may be provided by the class or grade teacher and endorsed by the principal. For the report to promote learning, this needs to be followed by advice and guidance for the learner on what they need to do next to improve further. If the assessment policy is being effectively implemented in classrooms, these 'next steps' will not be a surprise to the learner – they will be taken from the most recent feedback given by and discussed with the teacher.

If they have a report that gives sufficient and quality information, learners and parents will be able to ask key questions at face-to-face meetings or through conference telephone or video calls. For example, they will be able to check that a teacher is providing good enough support for a learner to make good progress in a particular subject. If a learner is not doing as well in geography as in history, the learner and parent should have that information. They can then try to find out why that is the case and what the teacher and school are doing to improve the situation. In other words, they can hold the teacher and the school to account.

Reports for the governing board

The governing board and/or owner will want to know how well all students are doing. They may well be the first to congratulate the school on its successes. They may also be ambassadors for the school to the local community and beyond. However, they should also challenge the school on whether or not it is providing an excellent education. Reports to governing boards should provide them with the information to do this. Even if the board is not interested in too much data, the school's senior management (as part of the self-evaluation process) should be. Data should allow for comparisons across grades and over time – for example how well learners in Grade 10 are doing in mathematics compared with their performance in physics. It might be of interest to compare whether boys are making as much progress as girls in each grade. If your assessment data is recorded electronically, it should be straightforward to compile the data. The school, and its governing board, might also be interested in comparing attainment against local, national and international standards.

A good report for stakeholders should include all the information that the reader will want to know and understand. It should be brief and to the point.

Data alone will not answer all the questions that stakeholders may have. For instance, a member of the governing board might notice that the attendance of learners in Grade 6 was better in term 3 than term 2. What they cannot tell is why this might be the case and, most importantly, what the school is doing to prevent the same issue arising in the next academic year. It is therefore important that data is accompanied by an analysis of what it is suggesting. The reader can then form a clear picture of what is going particularly well in the school and where there are areas of concern. Often too much importance is attached to performance in examinations. This can vary from cohort to cohort. Value-added measures are more reliable and helpful measures of progress over time.



Table 7: Some principles for reporting to parents

1. Make sure that the report is easy to understand. Use plain, everyday language. Avoid using technical terms that are only familiar to teachers.
2. Summative grades or marks are not informative unless they are accompanied with an explanation of what they mean a learner can do. It is good to:
   a. include objective information about what has been taught
   b. summarise learners' current knowledge, skills and understanding
   c. include areas for development (specific next steps or targets)
   d. consider, where relevant, referring to a portfolio of work that can be seen and discussed at a face-to-face meeting and/or include scanned or word-processed pieces of assessed work.
3. Show what progress a learner has made over the period since the last report (achievement). Focus on learning and progress rather than judgements.
4. Include what is expected of learners at a particular grade level. This will help parents check how well the learner is doing in comparison with others in the same grade.
5. Provide information about all areas of the learner's development. How well are they progressing socially as well as academically? Do they have the skills to work on their own? Can they concentrate for extended periods of time? Do they work and interact well with other learners? Do they have positive attitudes to learning and behave well?
6. Recognise effort and levels of engagement, as well as attainment.
7. Make it clear what parents can do to support their child's learning.
8. Include what teachers are doing and plan to do to support the learner(s) to make good progress.
9. Include data for attendance and punctuality.
10. Provide an opportunity for a face-to-face or video-conference discussion of learners' progress and of this report.

6: Evaluating teaching

Just as assessment that supports learning is critical for student development, teacher evaluation that focuses on providing accurate evidence of practice and supports improvement is central for teachers' development. Having clear standards that teachers are expected to meet is an important starting point considered in this chapter. We review evaluation processes, emphasising the importance of teachers' reflective participation. We also consider classroom observation practices and giving feedback to teachers who support professional growth and development.

6.1 What is teacher evaluation and why is it important?

Teacher evaluation is a vital element in improving student learning outcomes. It is concerned with gathering evidence from a range of sources that inform on teacher performance and using this to support improvements in practice. This is sometimes referred to as performance review, teacher appraisal or teacher assessment. A good teacher evaluation system is a powerful tool to:

- help schools improve
- identify opportunities for teachers of all levels to develop further
- deliver accountability for learner progress.

In the first round of the OECD Teaching and Learning International Survey (OECD 2009, p. 29), teachers reported that "performance review and feedback increases their job satisfaction and significantly increases their development as teachers".

There are a number of approaches that can be used in evaluating teaching. The most common include:

- classroom observations (by managers, other teachers or external evaluators)
- value-added models that try to measure gains in student achievement
- student evaluations of teachers
- judgements made by the teacher's line manager or principal
- teacher self-evaluation
- teacher portfolios of work.

How judgements are made is critically important. Too much weight can be given to a narrow range of evidence, for example students' examination performance. Triangulating evidence from a number of sources, systematically incorporating classroom observations and using more than one evaluator will help ensure judgements are sound.

Teacher evaluation systems are influenced by many factors. The following are important for their success:

- The system identifies and supports the values of the school.
- Teachers and managers are fully prepared for the implementation of the review system and they understand it.
- Care is taken that evaluation focuses on teachers' professional practice.
- Teachers are evaluated formatively to provide feedback and identify professional development needs, so their knowledge and experience can grow. In this way, performance review of teachers has a direct benefit on the learning experience of learners, and therefore on learner outcomes.
- The process is manageable and supports teaching rather than becoming a burden that hinders it.

Some systems emphasise evaluation with the intention of holding teachers to account rather than improvement. Some also link performance to salary changes. While there are effective evaluation systems that combine summative performance review with formative evaluation, there is a danger that they can unintentionally create a climate of fear and resistance among

teachers and inhibit creativity and honesty. Teachers might be less willing to be self-critical if their pay is linked to performance. Systems work much better when they motivate.

6.2 Developing standards for teachers

Standards are clear descriptions used to define and measure quality expectations. We have already considered the importance of developing a clear understanding of learning and assessment objectives when planning lessons, and ensuring learners understand these. For teacher evaluation the practice is similar. Teachers need to have a clear knowledge and understanding of the standards and criteria against which they can evaluate their own performance and against which they will be evaluated by their managers.

Most schools will already have their own standards for teachers that can be refined and developed. Some Cambridge schools will be operating in systems where national standards are already prescribed, and they could expand these. Researching standards that have been developed by excellent schools and school systems is helpful (see for example Danielson 1996). However, it is important for schools to develop their own and not just copy a system designed for another context. Establishing appropriate standards needs to be led by the school's most skilled practitioners, who know the expertise and competencies good teachers must have. Standards need to be informed by the school's vision and mission as well as the expectations Cambridge International defines. We created the Cambridge teacher and learner profiles (see Chapter 4, Table 4) to help schools identify the sorts of attributes teachers need to be effective at delivering Cambridge programmes, and it provides an important reference.

One example of a four-criteria model for developing teacher standards is described next. Please note that this is provided for guidance only.

Table 8: Four-criteria model for developing teacher standards

Stage 1

Agree the criteria. The criteria in this model have been designed as broad headings to describe the key elements in which a good teacher will be engaged.

- Learner development and well-being.
- Learner achievement and progress.
- Teacher professional development and improvement.
- Contribution to whole school and community (in order to promote learning).

Stage 2

Agree the aspects of the teacher's role that contribute to the criteria. It might be helpful to make a list of these and then to summarise the expectations as in the model below.

Learner development and well-being.

Every teacher in our school will:

- have high expectations of the behaviour, attitudes and potential for progress of all learners
- be confident, responsible, reflective, innovative and engaged
- manage classes and the classroom well
- inspire and motivate all learners
- build, model and nurture strong and positive relationships with all learners
- encourage all learners to reflect on their work and progress
- help all learners to set and achieve challenging and appropriate targets
- identify learners who need additional support and/or challenge and provide this.

The teacher uses resources, routines and procedures to provide a respectful, positive, safe, learner-centred environment that is supportive of all learners and conducive to learning.

Learner achievement and progress.

Every teacher in our school will:

- be accountable for learners' progress and outcomes
- plan and teach well-structured lessons that promote a love of learning
- have a secure knowledge of the curriculum area
- use a range of inspiring teaching resources
- use effective teaching strategies to help all learners to learn, including effective questioning
- assess learners' progress regularly and effectively
- give regular and supportive feedback to all learners.

The teacher plans and supports learning using the school's curriculum, effective strategies, resources and data. They engage learners effectively, measuring their progress and meeting individual learning needs.

Teacher professional development and improvement.

Every teacher in our school will:

- engage in professional development in their curriculum and/or specialist area
- take an interest in current research in the curriculum, effective teaching strategies and how children learn
- contribute to the professional development of other teachers in our school
- collaborate regularly with other teachers to improve our teaching practices
- develop expertise in and use a range of different resources, including ICT
- build, model and nurture strong and positive relationships with all colleagues
- contribute to our overall mission of the school as a learning community.

The teacher is a committed professional who communicates effectively. They take responsibility for and participate in professional growth that results in enhanced student learning.

Contribution to whole school and community (in order to promote learning).

Every teacher in our school will:

- build, model and nurture strong and positive relationships with all parents
- collaborate and communicate sensitively and respectfully with parents and the community
- make sure that parents understand what they can do to support their children's learning
- contribute to the personal development of learners outside the classroom through, for example, running an after-school club.

The teacher collaborates, communicates and works in partnership with learners, families and the school's community to promote student learning and achievement in and beyond the classroom.

Stage 3

To make sure that teachers can effectively assess their own practice and are confident that, when they are evaluated, that evaluation is fair and unbiased, they need to have examples of what is expected for each criterion. Exemplar behaviours or indicators should, therefore, be developed at this stage to explain what each of the criteria means in terms of teacher behaviour. For example, what does highly effective lesson planning really mean? How can we judge the difference between effective and developing practice in assessing learners' work?

The exemplar indicators in the model are designed to help teachers and evaluators judge whether teaching is highly effective, effective, or developing in response to each of the criteria. When used with supporting evidence, for example from classroom observation, they also provide a rigorous 'checklist' system. This will make sure that your monitoring and evaluation fairly and accurately assesses your teachers. Appraisers can also use these exemplar indicators when assessing how effectively teachers are fulfilling the teacher standards and criteria in their professional practice.

Stage 4

Introduce the standards and criteria to all your teachers. You may decide to consult with the whole teaching staff at this stage. Or, the working group may have consulted with curriculum areas while writing them. Whatever you decide, teachers need to have a good understanding of the standards and criteria you have developed and of their purpose and use. Their introduction will be a good starting point for you to discuss, plan and develop your teacher performance review policy.

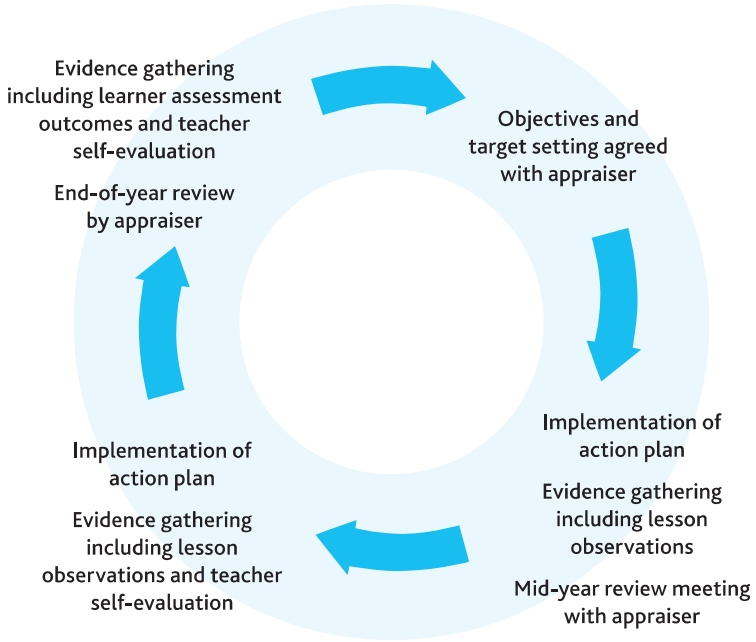


6.3 The teacher evaluation process

The following diagram illustrates a typical annual review cycle. The process starts with setting objectives. This might be completed immediately after the final review at the end of a school year, or at the start of a new school year. The teacher needs to reflect on their evaluation report. This will identify strengths and areas needing improvement, and a few priority objectives for the year ahead. Objectives should be focused and achievable, and need to be discussed and agreed with managers. You will also need to identify any professional development support that is needed. Remember that having too many objectives makes it difficult to focus on achieving them.

Teachers will incorporate their objectives and apply the teaching standards throughout the year. In an ideal situation managers should be visiting classrooms regularly.

Figure 6: Model of a teacher evaluation cycle



Feedback should be formative, supportive and ongoing. An excellent practice is to encourage teachers to visit each other's classrooms and act as 'critical friends'. Schools should use their best teachers as role models and a resource to support less experienced or underperforming staff. How far a manager observes and oversees a teacher will depend on the situation – teachers who are new to the profession or who are struggling will need more monitoring and support.

Ideally include at least one more formal meeting (normally mid-year) between teachers and their managers to review progress. Classroom observations provide critical evidence, and we consider these in detail in the next section.

One valuable form of feedback that some schools decide to use is student evaluation of teachers' performance. This practice only works well in some cultures and settings, so you must decide if it could work in your school. When done well, it can provide a particularly powerful form of feedback. Good student evaluation of teacher systems includes the following characteristics:

- Students are given very clear and specific guidance about the feedback being requested.
- Students' comments are in relation to the teaching standards and never personal.
- Students do not rate the teacher; they provide feedback.
- Teachers give students a list of questions, based on their own objectives and school standards. Students only respond to these.

Ways of making student evaluation less threatening include encouraging, but not requiring it, and/or requiring all feedback to go to the teachers concerned rather than the teacher's manager. The teacher is then expected to write a summary of the feedback, which is shared with their manager and considered at the final review.

The final review should be a well-structured meeting following a clear agenda. Documentary evidence is presented and discussed. This is likely to include lesson observation reports and the teacher's own self-evaluation. A common format for the report will help structure the meeting and ensure consistency. The meeting should be highly reflective, with teachers encouraged to talk about what they have learned and what they found challenging.

Procedures and practices also need to be defined to deal with any specific concerns about a teacher, for example by parents or students. This needs to be treated separately from teacher evaluation. Concerns that are repeated and substantiated will provide one source of evidence in evaluating performance. If concerns are proved justified, first create a course of action to help the teacher correct the performance issue(s). Keep a written record of the issues, agreed actions and support, as well as timeframes. The school needs to have a clear policy that identifies principles, practices and procedures that will be followed, ensuring fairness and transparency.

Managing the evaluation process

- Make sure that each teacher has an up-to-date job description.
- Allocate an appraiser to each teacher – usually the teacher's line manager.
- Identify a reasonable number of teachers that an individual appraiser is responsible for (a maximum of five teachers is recommended).
- Provide professional development and support to make sure that each individual appraiser:
  - has the specific knowledge, skills, understanding and time to carry out the role effectively
  - understands the school's policies and procedures and how performance review fits into the wider context of a teacher's professional development
  - has copies of all relevant documentation and any whole-school and team objectives as specified in the school development plan
  - understands the impact and implications of equal opportunities on the performance review process
  - is confident in evaluating evidence, including through classroom observation
  - is able to provide constructive feedback and engage in positive dialogue with the teacher
  - is aware of the resources available to support teacher development
  - is not over-burdened with performance review responsibilities.
- Make sure that there are opportunities for appraisers to share knowledge, learn from each other and align practice.
- Consider any justified request made by a teacher for a change in appraiser and make the final decision whether or not to agree a change.
- Make sure that all teachers understand the whole-school objective(s) they need to contribute to.
- Make sure that professional development not only addresses the needs of teachers identified through performance review but that it is also aligned to the whole-school improvement plan.

6.4 Classroom observation

Classroom observations are the most widely used source of evidence to give feedback to teachers. Observing lessons provides a unique opportunity to understand the curriculum students actually experience and what learners undergo on a daily basis. Unfortunately in many instances this is poorly done, with a very limited impact on student outcomes (Coe et al 2014). Schools need to ensure that the process is robust, understood and delivered in an environment of trust and understanding.

Observations can:

- give first-hand evidence to help evaluate an individual teacher's practice and the progress they are making in relation to the objectives agreed during teacher performance reviews
- monitor whether the school's teaching standards are being applied consistently throughout the school
- give a deeper view of the school's performance by triangulating classroom observation findings with other data (for example scrutinising learners' work, analysing end-of-unit assessments and students' performance in Cambridge qualifications)
- show how well new courses or schemes of work are being introduced
- provide first-hand knowledge of what learners experience in a particular year group or grade (learner shadowing, where an evaluator follows one student for a day or more, attending all their classes)
- establish where in the school good practice exists and identify expertise so that it can be used as part of the school's professional development programme

- offer opportunities for mentoring and coaching
- offer opportunities for teachers to work collaboratively by becoming 'critical friends' of each other's practice.

Observing a lesson is a privilege and a responsibility. Positive relationships between teachers and learners and between learners themselves are built and developed over time, and are crucial for a strong learning ethos in the classroom. Having an observer in the classroom can place pressure on teachers, even when the observer is present as a 'critical friend' or to observe learners rather than aspects of the teacher's practice. This can affect the behaviour of teachers and learners.

Where classroom observations are primarily used for teacher evaluation in a school, teachers tend to be more nervous about the process. It can be very helpful to encourage using observation developmentally by involving all teachers in observing lessons of their peers. This could be through developing a coaching model or in a less formal way, for example teachers observing other teachers in their subject area. Peer observations can play a key role in gaining teachers' confidence in the benefits of classroom observation for sharing and developing practice.

Having clear protocols or guidelines for classroom observation practice can also help to make sure that the experience is as positive and developmental as possible – for the teacher, the observer and learners. Involve teachers in agreeing these protocols so that they understand the purposes of classroom observation and feel a greater ownership of the process. They will also recognise that it can be a key support for their professional learning. The following are examples of questions you might wish to ask:

- Should teachers always be warned about an observation, even when it is not part of their evaluation? What notice should a teacher be given of a formal observation?
- Should there be a limit on the number of times a teacher's class is observed?
- Can teachers arrange to observe each other informally in addition to any whole-school or subject-wide observation schedule?
- Should classroom observation guidance apply to impromptu 'drop-in' observations?
- Should there be guidelines for observers? For example, you may wish to state that, unless agreed in advance, the observer should not interrupt or join in with the lesson, but may take opportunities to talk to learners when appropriate.
- Should there be guidelines for teachers? For example, should teachers greet the observer? Should they make sure a lesson plan is placed where they wish the observer to sit?
- What preparation or training should the school provide for teachers in classroom observation practice and giving feedback?

Developing classroom observation strategies

For formal observations that form part of the evaluation process you will need a common approach to ensure fairness and consistency. Table 9 provides some guidance on effective observation practices. Table 10 provides one very simple example of a teacher evaluation form.

Table 9: Suggested strategies for observing lessons

Observing lessons
Think how you would like an observer to behave in your classroom and model this. Remember that you are a colleague, not an inspector. Whatever the focus of the observation, the purpose should be about improving learning and so be developmental. Try to put your colleagues at ease and be as unobtrusive in the classroom as possible. If you stand with a clipboard and pen it looks more like you are there to judge performance rather than observe to support development.
Arrive at the lesson promptly. Unless you are only observing the final part of the lesson, or are conducting a learning walk, it is courteous to arrive at the lesson on time. Take the seat provided for you and see how the lesson starts.
Remember you are there to observe. Observing means watching attentively. If you are writing all the time you are in the lesson, you cannot observe properly. A good method to practise is to avoid writing anything for at least 10 minutes. Then, when you do write, make concise notes using bullet points. This will help you remember particular strengths and areas for improvement to discuss with the teacher (What went well; even better if…). Think of standing back and looking at the 'big picture'. This is often what teachers in the classroom fail to do for themselves, so your post-lesson discussions will be all the richer if you are able to 'replay' this for them.
Focus on the learners. Whatever the focus for the observation, look for the teacher's impact on each learner and their progress. This takes practice, but it is helpful to think in terms of cause (what the teacher does) and effect (what progress towards mastering the learning objective all learners make as a result). If we do this, it helps to make sure that we are objective observers. It also makes it less likely that our observations are influenced by our own style of teaching or over influenced by those teachers who are naturally more charismatic. It also makes sure that we recognise the strengths of a lesson planned so effectively that the teacher appears to be redundant because learners take full charge of their own learning.
Look at the resources available to learners. Are there sufficient and appropriate resources to support learners? Do learners and the teacher use technology effectively to support learning?
Take opportunities to talk to learners. There should always be opportunities to talk and listen to learners without disturbing their learning or interrupting the teacher in a lesson. Of course, this should be done quietly and discretely. However, if there are no opportunities because it would interrupt the teacher, then the teacher is probably directing and instructing too much. If you are worried that it would disturb the learners, think about moving to sit and listen to different groups while they are working. Ask questions that are relevant to their learning. For example, ask them to describe what they are doing and how they will know that they have achieved the learning or lesson objective well. Ask if you may look at their workbooks while they are working on something else. Learners can provide us with lots of primary evidence including: • what it is like to attend lessons with this teacher in this subject, so how typical the lesson you are observing is • how enthusiastic they are about their learning and the course • how much progress they think they are making and how they know this • how effectively the teacher delivers the course and helps them to understand what they need to do to improve further • any problems they are facing and what support they receive from the teacher. Before the observation think about what you want to know and what questions you will ask if you have the opportunity. • Talk to learners about the work they are currently doing and past work in their books. • Plan questions carefully to suit the age group of the learners. • Avoid leading questions. • Keep the questions brief and simple. • Use real examples in questions. • Ask questions that do not go back too far for younger learners to remember.
Look at work and displays on the walls. Take time to look around you to observe the learning environment. Are there any resources on the walls to support learners? Do they find them useful? Are there any examples of assessed learner work on display? Does it help learners to know what to aim for and how they can get there?

Table 10: Example of a teacher evaluation form

A	**Overall learning environment created by the teacher** (Evidence in lesson observation)					
		1	2	3	4	Comments
1.	The teacher creates a safe and pleasant learning environment					
2.	The teacher clearly respects the students and listens to the voice of the learner					
3.	The overall atmosphere in class is positive and encouraging					
4.	The teacher has an open and approachable relationship with students					

B	**Instructional practice** (Evidence in lesson observation, lesson plans)					
		1	2	3	4	Comments
5.	The teacher leads the class in well-prepared activities					
6.	The objectives of the lesson are clear to the teacher and to the students					
7.	The lesson accurately develops student understanding of part of the Cambridge curriculum					
8.	The teacher has an open and approachable relationship with students					
9.	The teacher checks students' (previous) understanding					
10.	The teacher uses classroom materials and media when appropriate					
11.	The teacher delivers the lesson clearly in an effective style					

C	**Differentiation** (Evidence in observed lesson, lesson plans, student work, student questionnaire)					
		1	2	3	4	Comments
12.	The teacher pays special attention to the very able students (e.g. by offering in-depth assignments and tasks)					
13.	The teacher pays special attention to the academically weaker students					
14.	The teacher supports bilingual students within his or her subject area					

continued

D	**Preparation** (Evidence lesson plans, student work, student questionnaire)					
		1	2	3	4	Comments
15.	The teacher is aware of Cambridge expectations, as published in the guide, and uses the Cambridge syllabuses and support materials in planning lessons					
16.	Lessons are planned that incorporate a variety of appropriate activities consistent with Cambridge expectations					

E	**Assessment** (Evidence in marked student work, observed lesson, lesson plans, student questionnaire)					
		1	2	3	4	Comments
17.	The teacher provides regular, clear and accurate formative feedback to students on their performance indicating what they need to do to improve. Cambridge assessment criteria are appropriately used					
18.	The teacher provides regular, clear and accurate summative assessment					
19.	Students demonstrate understanding of the nature and expectations of Cambridge assessment in the subject					

F	**Beyond the classroom** (Evidence: self-evaluation, faculty head comments, student feedback)					
		1	2	3	4	Comments
20.	The teacher is a proactive departmental colleague					
21.	The teacher is actively engaged in professional development to become a better teacher					
22.	The teacher supports students with their learning beyond the classroom by offering extra academic support					

6.5 Giving effective feedback to teachers

In a review of research, What makes great teaching? (Coe et al 2014, p. 39), the authors cite a range of studies that "… suggest the quality of feedback is a key component of any teacher assessment". To make sure that feedback is high quality, observers need guidance, training and practice. They identify six principles for teacher feedback that support sustained professional learning:

1. The focus is kept clearly on improving student outcomes.
2. Feedback is related to clear, specific and challenging goals for the recipient.
3. Attention is on the learning rather than the person or on comparisons with others.
4. Teachers are encouraged to be continual independent learners.

5. Feedback is mediated by a mentor in an environment of trust and support.
6. An environment of professional learning and support is promoted by the school's leadership.

Just as classroom observation should be supportive and developmental, so feedback to teachers on what has been observed should help them to decide on their next steps for professional learning and development. Ideally give verbal feedback to the teacher within 48 hours of the observation. If the observation is formal, review the lesson with the teacher and provide a written record, preferably within one week.

The written record should include the date of the observation, the focus of the observation, what was learned from it, the feedback given and any further actions/follow-up agreed. Teachers are learners, so many of the suggestions described in Chapter 5 on giving effective developmental feedback to students are also relevant to teachers.

Table 11: Providing feedback to teachers

Conducting the lesson review	• Be prompt. The review will be more worthwhile when it is easy to recall the lesson. • Encourage teachers to talk about what they have learned. They should also talk about what they found challenging in supporting learners to achieve the learning objective through the activities chosen. • Give teachers opportunities to discuss their work, focusing on how they can improve. • Ask teachers questions that encourage them to explain their thinking, e.g. "Can you tell me your thinking behind your choice of activities in the lesson?" • Make sure it becomes commonplace for teachers to reflect on each lesson and what they have learned as well as what students learned. • Help teachers to identify their next steps in learning.
Providing feedback	• Be focused. Include two or three areas for improvement, referenced to the lesson observed. • Be intelligible. Feedback should be unambiguous and clear. • Be constructive. Include specific guidance for improvement and point towards the relevant criteria for success. Feedback should be specific to individual teachers (not comparing with other teachers) and identify what worked well in addition to what they need to do to improve and how to do it. • Be supportive. Use a positive tone and make clear the support that is available for the teacher. • Relate to the progress made by learners and what the teacher does to support and promote this. • Provide the teacher with more than he or she could gain from self-evaluation of the lesson e.g. information on learner progress gained from talking to individuals and small groups during the lesson; an objective view of whether all learners were engaged actively throughout the lesson. • Be challenging. Encourage the teacher to think more deeply about what they do well, what areas they could improve upon, and how they might do this. • Provide time and support for teachers to act on the feedback given. • Help to identify the next steps in learning.

7: Planning and managing a whole-school professional development programme

"We will fail ... to improve schooling for children until we acknowledge the importance of schools not only as places for teachers to work but also as places for teachers to learn" (Smylie 1995).

Throughout this guide we have emphasised the importance of teacher professional development. This chapter suggests principles schools need to think about as they plan their professional development activities. The focus should be on improving learning outcomes. Therefore, important sources of information about priorities for professional development will come from the key areas covered in previous chapters: the school development plan, improving student learning through assessment practices and evaluating teachers. Schools should pay particular attention to coaching and mentoring teachers. They should also take a systematic approach to evaluating their efforts to support continuous professional learning. Finally, this chapter emphasises the need to establish and foster communities of practice in schools and how Cambridge Professional Development Qualifications can help this to happen.

7.1 Planning and evaluating professional development

We cannot overstate how important teacher professional development is to school improvement. In a review of the impact of different school leadership practices on learner outcomes reported in the introduction (Robinson 2007), leaders promoting and participating in teacher learning and development had the greatest impact on student learning.

Timperley (2008) synthesised the research on teacher professional learning and development that has been shown to have a positive impact on valued student outcomes. Her advice for schools planning for teachers' professional learning includes:

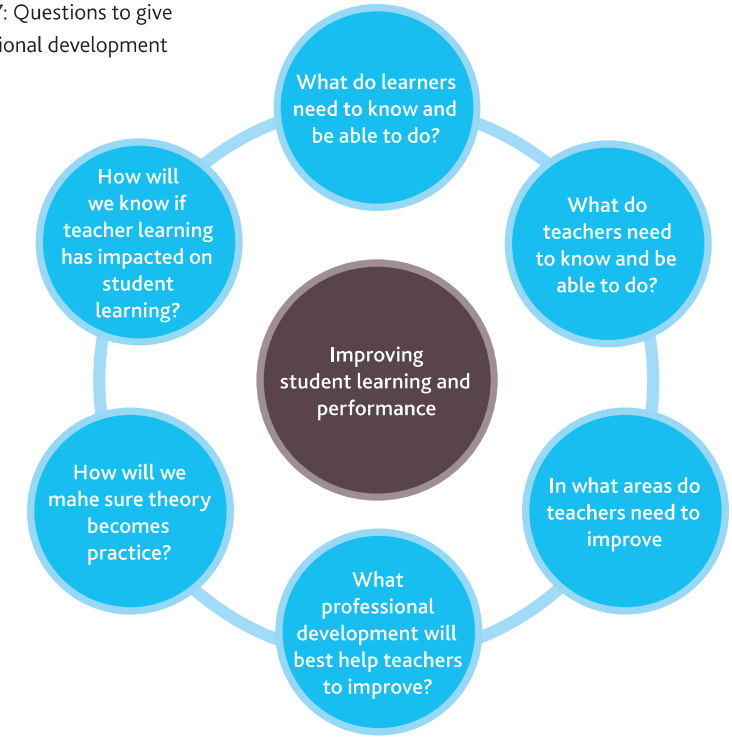
- The focus should be on improving valued learner outcomes. Start with students' learning needs. *"Teachers need to be able to answer the question what knowledge and skills do we as teachers need to help students bridge the gap between current understandings and valued student outcomes?"*
- There need to be repeated and sustained opportunities to embed any new learning in an environment of trust and challenge.
- New learning needs to take account of existing practice and prevailing ideas about teaching and learning.
- Leaders should create an environment that supports professional learning.
- Leaders should promote professional learning.

The importance of linking teacher evaluation to professional development was mentioned in Chapter 6. It is very likely that patterns will emerge from teacher evaluations suggesting priorities for professional development. The school development planning process will also identify areas for teacher development which may relate to the whole school or to specific disciplines or year groups. As Figure 7 illustrates, the sequence starts with identifying needs, considering how practice can be improved, applying new practices and then evaluating their impact. Too often important parts of this process are missed out, in particular assessing the impact of changes on student learning, which will then provide input into the next cycle of development.

Teachers and schools are inundated with ideas about how to improve teaching and learning. Some are appropriate, some are not. Too often professional development activities in schools are superficial because too much is attempted – decisions are made

based on the interest an individual has with a new practice rather than on the needs of students. Once you have decided the priorities you must fully engage with them and identify appropriate principles and practices for improving pedagogy. Embedding new practices takes time and effort, and this is another reason why persistent effort and evaluation need to be part of the process. External input, either from outside the school or from experienced colleagues in other parts of the school, can be very helpful. Schools should look internally to their own resources, supporting teachers through coaching and mentoring. The most effective professional development focuses on improving learning rather than changing teaching practice (see Weston 2013).

Figure 7: Questions to give professional development



Professional development refers to a wide range of activities that are intended to improve teacher practice. These include:

- mentoring and coaching
- encouraging teachers to work collaboratively to conduct lesson studies and/or research into the impact of any new teaching strategies they have implemented
- developing team teaching
- developing teaching and learning communities
- encouraging groups of teachers to engage with, and learn from, other successful schools – locally, nationally and internationally
- attending Cambridge training courses
- encouraging teachers to become trainers themselves
- encouraging teachers to become examiners
- encouraging teachers and leaders to take Cambridge Professional Development Qualifications.

Professional development needs will depend on the situation. Teachers new to the profession, or to teaching Cambridge qualifications, will need support from experienced colleagues and to attend appropriate Cambridge training events. Experienced Cambridge teachers will want to improve their practice by leading the development of others (being mentors), involving themselves in professional learning communities, or becoming Cambridge trainers or examiners. They might also want to complete Professional Development Qualifications provided by Cambridge International or others. Some schools do not use their own experienced staff enough to lead the learning for others in the school, relying too much on external training.

Whatever professional learning you engage in to meet your needs, it is important to monitor progress and evaluate to check that it is doing what you need it to do. One framework schools can use to do this (and to answer the question: How will we know if teacher learning has impacted on student learning?) is provided by Guskey (2000). This framework provides five critical stages or levels of evaluation that are arranged hierarchically and move from the simple to more complex. The table below lists these stages. It also shows the key research questions and methodologies schools can use to make the impact of their professional development programmes more visible to their community.

Note that with each succeeding level, the process of gathering evaluation information is likely to require increased time and resources. As Guskey (2000, p. 78) states, *"each higher level builds on the ones before [such that] success at one level is necessary for success at the levels that follow"*.

Table 12: Adapted from Five Critical Levels of Professional Development Evaluation (Guskey 2000)

Evaluation level	What questions are addressed?	How will information be gathered?	What is measured or assessed?	How will information be used?
1. Participants' reactions	• Did they like it? • Was their time well spent? • Did the material make sense? • Will it be useful? • Was the leader knowledgeable and helpful? • Was the environment right and fit for purpose?	Questionnaires administered at the end of the session.	Initial satisfaction with the experience.	To improve programme design and delivery.
2. Participants' learning	Did participants acquire the intended knowledge, conceptual understandings and skills?	• Questionnaires • Simulations • Demonstrations • Participant reflections (oral and/or written) • Professional portfolios of evidence.	New knowledge, understanding and skills of participants.	To improve programme content, format and organisation.
3. Organisation support and change	• Was implementation advocated, facilitated and supported? • Was the support public and overt? • Were problems addressed quickly and efficiently? • Were sufficient resources made available? • Were successes recognised and shared? • What was the impact on the organisation? • Did it affect the organisation's culture and procedures?	• School records • Minutes from follow-up meetings • Questionnaires • Structured interviews with participants and school leadership • Professional portfolios of evidence.	The organisation's advocacy, support, accommodation, facilitation and recognition.	To document and improve organisation support. To inform future change efforts.

continued

Evaluation level	What questions are addressed?	How will information be gathered?	What is measured or assessed?	How will information be used?
4. Participants' use of new knowledge and skills	• Did participants effectively apply the new knowledge and skills? • Did classroom practice change as a result?	• Questionnaires • Structured interviews with participants and their mentors • Participant reflections (oral and/or written) • Professional portfolios of evidence • Direct observations • Video or audio tapes.	Degree and quality of implementation.	To document and improve the implementation of programme content.
5. Student outcomes	• What was the impact on students? • Did it affect student performance or achievement? • Did it influence students' physical or emotional well-being? • Are students more confident as learners? • Is student attendance improving? • Are dropouts decreasing? • Have levels of literacy and numeracy improved?	• Student records (formative and summative) • School records • Questionnaires • Structured interviews with students, parents, teachers, and/or leadership • Professional portfolios of evidence.	Student learning outcomes: • Cognitive (performance and achievement) • Metacognitive or self-regulated learning • Affective (attitudes and dispositions) • Psychomotor (skills and behaviours).	To focus and improve all aspects of programme design, implementation and follow-up. To demonstrate the overall impact of professional development.

The key purpose of professional development is made clear – to change classroom practice and thereby improve student outcomes. If schools are serious about the investments they make in this area, then a systematic approach to evaluation is key – to both understand the effectiveness of teacher professional development and determine future expenditure. Adopting the framework provided by Guskey will go some way in helping schools with this process.

7.2 Mentoring and coaching teachers

Introducing and implementing a high-quality programme of mentoring and coaching is one effective way of promoting good practice within the school to improve teachers' skills and performance. The terms 'mentoring' and 'coaching' are sometimes used as if they are the same. While they do have many aspects in common, each has specific attributes and specific uses. Schools need to consider the potential impact of each and carefully plan how to introduce and implement them.

A national framework for coaching and mentoring in England developed by the Centre for the Use of Research and Evidence in Education (CUREE) in 2005 distinguished between mentoring, specialist coaching and co-coaching (peer coaching):

- **Mentoring** is a structured, sustained process for supporting professional learners through significant career transitions.

- **Specialist coaching** is a structured, sustained process for developing a specific aspect of a professional learner's practice.
- **Collaborative (co-) coaching** is a structured, sustained process between two or more professional learners to help them embed new knowledge and skills from specialist sources in day-to-day practice.

Mentoring

Mentoring is a supportive, long-term relationship between an experienced teacher (mentor) and a less experienced teacher (mentee). A mentoring programme is often used as part of the induction process. It supports teachers who are newly qualified and/or new to the school, or those newly appointed to management or other 'new' positions. The relationship is characterised by the fact that the mentor has greater experience and more advanced skills than the mentee. The mentor seeks to alter and improve the teacher's behaviour, values and pedagogy. The process may form part of the teacher performance review process.

The role of the mentor:

- Provide support for the teacher, professionally and emotionally.
- Demonstrate effective teaching skills and strategies.
- Lead learning conversations that support, scaffold and challenge the teacher to improve their pedagogy.
- Support and guide the teacher's lesson planning, observe and assess the lesson, provide feedback against agreed criteria.
- Set targets for improvement with the teacher.
- Advise and help to negotiate the teacher's next steps for professional development.

Professional mentoring is a highly skilled role for which mentors need to be well prepared. In most cases, they will need professional development themselves to learn and develop the necessary skills. Mentoring itself will also provide opportunities for development, especially as the mentor will learn from the relationship with the mentee.

A professional mentor needs to have the following skills and attributes:

- A reflective practitioner with a clear understanding of what constitutes outstanding teaching and learning.
- Respected as an effective practitioner by other teachers and learners.
- A skilled, active listener and someone who asks the mentee open, rather than closed, questions.
- Effective at modelling and describing potential teaching strategies.
- Open to sharing and discussing pedagogy.
- Skilled and experienced at classroom observation and providing sensitive and developmental feedback.
- Prepared to commit time and resources to the mentoring relationship.

Coaching

According to Creasy and Paterson (2005, p. 10) *"Whilst it takes many different forms, coaching is principally a joint enterprise in which one person supports another to develop their understanding and practice in an area defined by their own needs and interests. ... Coaching often involves integrating new or alternative approaches into the professional's existing repertoire of skills and strategies."*

The coaching relationship is characterised by the fact that it is non-hierarchical and involves peer-to-peer discussion and collaborative working. Teachers choose their coaches and what area of their practice they want to work on. Coaching is a partnership, with the coach playing the role of 'critical friend'. They give objective feedback on the teacher's strengths and areas for development so they can evaluate their own performance. The coach may lead the discussions at times, but the teacher should be in control. In discussion with the coach, the teacher analyses and evaluates their practice, sets targets, identifies next steps for development, and decides what support or training they might need and where to find it.

The role of the coach involves:

- building a supportive, collaborative working relationship. This may include joint lesson planning, delivery and evaluation
- facilitating discussions and encouraging the teacher to take the lead
- not being judgemental
- normally being an equal, rather than a superior, to the teacher in the school's hierarchical structure

- focusing on the areas agreed with the teacher. For example, if the teacher has planned to use new strategies to differentiate by content, the coach may agree to gather data on individual learners. This will assess how well they are making sense of the content and reacting to the task. After the lesson, the coach and the teacher consider the lesson using the information gathered and evaluate the impact of the new strategies. (You could set up a video camera to record the lesson for deconstructing. This has the advantage of allowing the teacher and coach to observe the lesson together. Also, if the camera is set up on a tripod the coach does not necessarily need to be present in the lesson)
- giving feedback objectively, focusing on the agreed areas for observation
- supporting teachers to take ownership of their own professional development plan and set their own targets
- being chosen in agreement with the teacher.

Coaches require many of the same qualities and skills as mentors. The coach needs to have good listening skills and ask open and searching questions to help discussion. The relationship needs to be one of mutual respect and, like mentoring, coaching requires training and practice for it to be effective.

7.3 Establishing communities of practice through Cambridge Professional Development Qualifications

Throughout this guide we have emphasised the need to develop the teaching faculty of the school. This investment needs to be sustained over a long period of time. The main objective should be to improve classroom practice and student outcomes. Many successful schools achieve this by developing professional learning communities, or communities of practice among their teachers. These are gatherings of two or more teachers who share a common goal or interest, and which are characterised in the education context by (adapted from Lee and Spillane 2008):

- open classrooms – teacher classroom practice made available for peer observation and critique
- open dialogue between colleagues, deeply reflecting on their practice
- a focus on student learning
- a high degree of collaboration in terms of, for example, curriculum and assessment planning, moderating and standardising the marking of student work, etc.
- sharing constructive norms and values.

Cambridge International supports schools in developing communities of practice through its suite of Professional Development Qualifications. Otherwise known as PDQs, these qualifications have been designed to be integrated, over a sustained period of time, into a school's professional development planning, activities and culture. They help teachers and leaders to:

- engage critically with relevant concepts, principles, theories and international best practice
- apply new ideas and approaches in reflective practice
- evaluate experiences and outcomes to plan further development
- improve the quality of their teaching and leadership to enhance the quality of their learners' learning.

Professional learning draws on the candidate's own teaching and learning environment, making the qualifications immediately applicable and relevant. Crucially, Cambridge PDQs aim to help schools improve through cost-effective, sustainable programmes. They benefit teachers as well as their learners, and demonstrate to parents, carers and the school community that the school values and nurtures its teaching staff.

The suite of Cambridge qualifications covers four themed areas:

- Teaching and Learning
- Teaching Bilingual Learners
- Teaching with Digital Technologies
- Educational Leadership

All qualifications are available at both Certificate and Diploma level, with the Certificate providing a strong foundation for the Diploma. The Cambridge PDQs are accredited by University College London Institute of Education, offering successful candidates a clear pathway to further professional development. The courses are for international education professionals at all stages of their careers.

Becoming a Cambridge Professional Development Centre

Deciding to offer the qualifications is an important step in the school's development process. In doing so, the school is making a clear statement that continuous professional development is a key part of its overall improvement planning and that it wants to meet the needs of its teachers and learners.

All organisations wishing to offer Cambridge PDQs must be approved by Cambridge International. This process allows us to learn more about the school's values and approach to education, and ensure that it meets the appropriate quality standards. Once approved, the school will join a select network of organisations all working to improve their professional development strategy.

You can find more information in the following publications on our website at: www.cambridgeinternational.org/pdq:

- *Cambridge Professional Development Qualifications – a guide for Cambridge school leaders*
  www.cambridgeinternational.org/images/170403-cambridge-professional-development-qualifications-brochure.pdf
- *Becoming a Cambridge Professional Development Centre – a guide to the approval process*
  www.cambridgeinternational.org/images/171348-becoming-a-cambridge-professional-development-centre.pdf

8: Working with us

This chapter highlights the range of support services and resources we offer to schools working with us. This includes our Professional Development Qualifications, which were outlined in the previous chapter. It will give you an overview of the different types of support available and where you can find detailed information.

To help your teaching team understand and effectively deliver our programmes, and to meet their professional development needs, we offer a range of support materials and services. Teachers can access this support if your whole-school curriculum is built on Cambridge courses, or if you combine Cambridge courses with other national or international qualifications.

We can provide three major areas of support:

- curriculum materials and resources to support teachers in delivering subject curricula
- professional development
- local advisory and development services.

School Support Hub

An online resource bank and community forum where teachers can access thousands of Cambridge support resources, exchange lesson ideas and materials, and join subject-specific discussion forums.

Assessment tools

We provide dedicated online support to schools registered to offer Cambridge Primary and Cambridge Lower Secondary. Teachers can download progression tests and use results analysis tools to monitor learners' progress.

For teachers and students of Cambridge Global Perspectives

Cambridge schools offering Cambridge Global Perspectives can use our online learning area. It provides a space for teachers and learners to build online communities where they can share resources and work with other schools. In addition, there are interactive Cambridge IGCSE and Cambridge International AS Level Global Perspectives courses available in the online learning area.

Teaching resources

Syllabus (or curriculum framework)

The most important documents teachers will use. They describe what learners need to know, what they must be able to do, and how they will be assessed. We provide curriculum frameworks for Cambridge Primary and Lower Secondary subjects and syllabuses for Cambridge Upper Secondary and Cambridge Advanced subjects.

Schemes of work

Medium-term plans that give ideas on how teachers might deliver the courses.

Teacher guides

Some subjects have teacher guides which provide extra guidance on planning and teaching.

Textbooks and publisher resources

We publish lists of resources to support teaching, including textbooks and websites. Some of these resources are endorsed by us. This means we have quality checked them and judge them to match the syllabus content well.

Example candidate responses (Standards Booklets)

Real candidate answers are shown alongside examiner comments so teachers can see the level of performance needed to achieve each grade.

Exam preparation materials

Past question papers

We publish past papers for each subject. These are useful for giving learners practice at answering different types of question.

Examiner reports

Our principal examiners write detailed reports describing learners' overall performance on each part of the question. The reports give insight into common misconceptions shown by learners, which teachers can address in lessons.

Grade thresholds

These show the minimum number of marks learners needed to achieve in order to be awarded a particular grade.

Mark schemes

These help teachers understand how marks are awarded for each question and what examiners look for when they mark.

For more information go to www.cambridgeinternational.org/teachers

Local support

We can provide local support and guidance for teachers and school leaders involved in implementing the Cambridge curriculum. By working with you we will be able to respond to your specific needs by providing a more personalised experience. We can also help identify solutions or processes to address any problems or challenges you may experience. If you need longer-term support we can work with you to develop and implement a more formalised programme. This could include expert consultancy around activities introduced in this guide, including whole-school evaluation, school development planning and teacher evaluation.

If you are interested in local support please contact us at info@cambridgeinternational.org with 'Local curriculum support request' in the email subject line.

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Annotated bibliography

This guide has provided an introduction to school development, with the aim of improving the delivery of Cambridge programmes and increasing the quality of student learning. In this section we identify some texts for schools interested in exploring some of these ideas further. We recommend these because they are relevant, research based, accessible and reasonably priced. They are good starting points from which you can follow your particular interests, but represent only a few of the wide range available. We encourage schools to share any literature and resource material they have found useful through the School Support Hub.

Black, P., Harrison, C., Lee, C., Marshall, B. and Wiliam, D. (2003). *Assessment for Learning: Putting it into Practice*. Buckingham: Open University Press.
Based on a two-year research project, this title describes the specific assessment for learning practices that 36 UK teachers found productive. It explores the underlying ideas about learning that these practices illustrate and discusses the problems that teachers encountered when implementing the new practices in their classroom. It offers guidance for school management about promoting and supporting such changes.

Clarke, S. (2014). *Outstanding Formative Assessment:* Culture and Practice. London: Hodder Education.
This book focuses on how teachers can create an environment for pupils to be active learners, constant reviewers and self-assessors. It provides ideas and practical strategies based on classroom examples and whole-school case studies for teachers in primary and secondary schools. It includes stories from outstanding schools in order to explore whole-school development.

Claxton, G. (2002). *Building Learning Power: Helping Young People Become Better Learners.* Bristol: TLO.
Building Learning Power is grounded in international research and practical experience. It addresses the skills and understanding that are needed to enable teachers to help young people become better lifelong learners. It offers practical guidance on how teachers can create a culture in the classroom and in the school more widely that systematically cultivates habits and attitudes to empower young people to face difficulty and uncertainty calmly, confidently and creatively.

Guskey, T.R. (2000). *Evaluating Professional Development.* London: Corwin Press.
This book explores the processes and procedures involved in evaluating professional development. It moves through five levels to examine: participants' reactions to professional development; how much participants learn; the evaluation of organisational support and change; how participants use their new knowledge and skills; and improvement in student learning. It includes sample evaluation forms, checklists, and helpful tips.

Hargreaves, A. and Fullan, M. (2012). *Professional Capital: Transforming Teaching in Every School.* London: Routledge.
This book presents action guidelines for classroom teachers and school leaders to transform the culture of teaching and teacher development.

Hattie, J. (2012). *Visible Learning for Teachers: Maximising Impact on Learning.* London: Routledge.
In Visible Learning (2008) Hattie synthesised the results of more than 15 years' research and over 800 meta-analyses on the influences on student achievement. This title explains how to apply the principles of Visible Learning to any classroom. It offers user-friendly summaries of the most successful interventions and practical step-by-step guidance to the effective implementation of visible learning and visible teaching in the classroom.

Hopkins, D. (2001). *School Improvement for Real.* London: RoutledgeFalmer.
This book sets out a strategy for educational change that focuses on student achievement by modifying classroom practice and adapting the management

arrangements within the school to support teaching and learning. It outlines an approach to school improvement that has a medium-term, systemic orientation, providing both principles and suggestions for better practice.

MacBeath, J. and Dempster, N. (Eds.) (2009). *Connecting Leadership and Learning: Principles for Practice.* London: Routledge.
This book explores what it means to lead schools that place learning at the centre. It draws on research from seven different country projects to offer five key principles for practice: a focus of learning; an environment for learning; a learning dialogue; shared leadership; internal and external accountability.

MacBeath, J. and McGlynn, A. (2002). *Self-Evaluation: What's in it for Schools?* London: RoutledgeFalmer.
This title makes school self-evaluation accessible, and through the use of case studies, helps schools and teachers to develop self-confidence in working with evaluation tools. It discusses the concerns and issues of schools today to propose challenging ideas for the future.

MacBeath, J. and Mortimore, P. (Ed.) (2004). *Improving School Effectiveness.* Buckingham: Open University Press.
This book reviews findings from seminal international work to analyse school effectiveness, its measurement, and its impact for teachers, parents and pupils.

Mercer, N. and Hodgkinson, S. (Ed.) (2010). *Exploring Talk in School.* London: Sage.
Classroom talk is essential for guiding the development of understanding and for learners to understand their teachers and their peers in constructing knowledge. This book considers the practical steps teachers can take to develop effective classroom interaction, looking at: classroom communication and managing social relations; talk in science classrooms; using critical conversations in studying literature; exploratory talk and thinking skills; talking to learn and learning to talk in the mathematics classroom; the 'emerging pedagogy' of the spoken word.

Muijs, D. and Reynolds, D. (2011). *Effective Teaching: Evidence and Practice.* 3rd ed. London: Sage.
This book provides insights into the latest research on effective teaching and learning relevant for primary and secondary levels. The authors provide a broad and comprehensive overview of the large body of knowledge on effective teaching. It explores: generic teaching skills; teaching for specific goals; subject-specific strategies and other classroom issues. Practitioners are encouraged to reflect through the points for reflection and further reading.

OECD. (2013). *Teachers for the 21st Century: Using Evaluation to Improve Teaching*. OECD Publishing.
Based on evidence from across the world, this report discusses how teacher quality is defined and what standards are set and by whom. It examines what systems are in place for teacher evaluation, how evaluations are conducted and how teacher evaluation contributes to school improvement and teacher self-efficacy.

Pollard, A. (2014). *Reflective Teaching in Schools.* 4th ed. London: Bloomsbury.
This book offers practical advice and evidence-based guidance on key issues in classroom practice including relationships, behaviour, curriculum planning, learning and teaching strategies, assessment and evaluation. It introduces principles and concepts to support a deeper understanding of teacher expertise. It provides numerous examples of effective reflective teaching from diverse school contexts across the world.

Robinson, V. (2011). *Student-Centred Leadership.* San Francisco: Jossey-Bass.
This book shows leaders how they can make a bigger difference to the quality of teaching and learning in their school and ultimately improve their students' performance. It is based on evidence about the impact of different types of leadership on student outcomes. The book includes examples of five types of leadership practice as well as practical lessons and rich accounts of the knowledge and skills that leaders need to employ them with confidence.

Swaffield, S. (Ed.) (2008). *Unlocking Assessment: Understanding for Reflection and Application.* London: Routledge.
This book explores the values, principles, research and theories that underpin our understanding and practice of assessment. It provides practical suggestions and examples, and addresses key points about the future development of assessment. Complex but crucial ideas and issues are made accessible, so that teachers can be more confident and proactive in shaping assessment in their classrooms, in ways that support learning and avoid unintentional harmful consequences.

Wiliam, D. (2011). *Embedded Formative Assessment.* Bloomington: Solution Tree Press.
Wiliam outlines five key strategies of formative assessment: clarifying, sharing and understanding learning intentions and criteria for success; engineering effective classroom discussions, activities and learning tasks that elicit evidence of learning; providing feedback that moves learners forward; activating learners' instructional resources for one another; activating learners as the owners of their learning. Through a summary of the research evidence he shows the impact of each of these strategies, and offers many practical techniques that teachers can use to incorporate the strategies into their classroom practice.

Glossary

Active learning
Learning which engages students and challenges their thinking, using a variety of activities.

Assessment criteria
Concise, written descriptions of what students are expected to know or be able to do and how this will be measured.

Assessment for learning
Approaches employed during learning activities to help teachers and students evaluate progress, providing guidance for subsequent teaching and learning. See also formative assessment.

Assessment rubrics
Make clear the assessment criteria being used and describe different levels of performance in relation to these criteria.

Benchmark
A measure of performance against an established standard.

Bilingual education
Teaching and learning in two or more languages, developing both subject and language knowledge, and skills. For Cambridge International, bilingual education means that learners study typical school subjects – for example, maths or geography – through an additional language (such as English) and some subjects through their first language, or they may study the same subject through two languages. See also www.cambridgeinternational.org/bilingualeducation

Cambridge community
Schools using Cambridge educational programmes.

Cambridge Handbook
The official document detailing the regulations for running Cambridge examinations and assessments. It details the responsibilities of Centres and forms part of the schools' contract with Cambridge International.

Component
An assessable part of a subject examination, not certificated as a separate entity, e.g. a written paper or a practical.

Coursework
Classroom assignments undertaken by learners as prescribed in the syllabus. Normally assessed by the learner's teacher according to criteria set by Cambridge International. The work is moderated within the school and then by Cambridge International or in some cases assessed directly by Cambridge International.

Criterion referenced
Performance is measured against a fixed set of predetermined criteria, which are concise, written descriptions of what students are expected to know and be able to do. This contrasts with norm referencing, where students' performance is compared with that of other students.

Curriculum
An overall description of the aims, content, organisation, methods and evaluation of the learning programme and the factors influencing the quality of learning. The term is used in different ways. In this guide the term is qualified as follows:

- The *school curriculum* refers to the combination of subjects provided by the school.
- A *subject curriculum* refers to the content, skills, conceptual understandings and activities prescribed for a subject over a particular time period.
- The *written curriculum* is the prescribed course of study identified in documents such as syllabuses and schemes of work.
- The *taught curriculum* is what teachers actually deliver in the classroom.
- The *assessed curriculum* is what is summatively assessed at the end of a particular time period.
- The *experienced curriculum* is what students actually learn from their whole educational experience. This includes both planned and unintended outcomes, as a result of all their activities in the learning environment provided by the school.
- The *co-curriculum* refers to valued educational activities, such as social and emotional development, that support learning beyond the school curriculum. The school encourages and supports this.

Curriculum framework
The systematic structure of the curriculum as set out in document(s) specifying the way in which learning and assessment is to be organised.

Curriculum mapping
This documents all the interrelationships within the curriculum for a particular group of students, making links between subjects, skills development, conceptual understandings and activities over time.

Development planning
The overarching process of enquiry, evaluation, prioritisation, planning and execution of plans designed to improve the learning and achievement of all students.

Differentiated learning
Adapting teaching to suit the needs of different learners based on their current level of understanding and performance in order to help all students fill their potential. This is achieved by providing appropriate learning activities, support and assessment, so that all students in the group can learn effectively.

Educational aims
Statements of the broad purposes or intentions of the curriculum or learning programme.

Evaluation
In this guide 'evaluation' means judgement with a view to improve. Evaluation can also refer to a judgement that holds an individual or group to account. Evaluation involves a process of enquiry based on evidence leading to judgements.

First language
The main or primary language that the learner or teacher uses. When we refer to 'maintenance of the first language', it usually means the language learned first. When we refer to the 'first language as a medium of instruction' in a bilingual education programme, it usually means an official first language identified by the school, not necessarily an individual's 'mother tongue'.

Formal formative assessment
Formative assessment which is planned in advance. It is used to inform the next stage of teaching, for example a class test at the start of a lesson for the whole class with feedback into the teaching of that class.

Formative assessment
Assessment practices used primarily to support students' learning. This includes providing feedback and questioning during the learning process, allowing teaching and learning activities to be modified to improve learning. Harlen (2012, p. 98) makes a distinction between the following:

- **Informal formative assessment**, which broadly corresponds to **assessment for learning**. Characterised by immediate feedback as a normal part of classwork and usually not planned in advance.

Higher education
Courses in universities and colleges beyond upper secondary school, e.g. degrees.

Management cycle
An iterative process in which school leaders set goals, implement actions, and monitor and evaluate progress and outcomes in relation to the school's strategic plan.

Metacognitive awareness
The ability of a learner accurately to judge their own learning in specific areas and be able to effectively manage it, becoming a self-regulated learner.

Mission statement
A written declaration defining the school's educational purpose and the school's educational aims and values. This might be included in the statement or listed separately.

Moderation
The process of checking that assessment standards have been applied correctly, consistently and fairly, and making adjustments if necessary to ensure that all assessments are aligned to the standards.

Norm referenced
A process in assessment that measures how a student performed in relation to other students being assessed or a hypothetical average student, which is determined by comparing scores against the performance results of a statistically selected representative group of those assessed.

Pedagogy
The theory and practice of teaching and learning.

Professional development (PD)
Teachers continuously and systematically reflect on and improve their professional thinking and practice, engaging in appropriate learning opportunities to improve and upgrade their knowledge and skills.

Programme of study
A planned schedule of teaching and learning activities, relating to the curriculum framework and qualification. See also Curriculum.

Qualification
The formal certificated recognition of a student's achievement at the end of a particular course. This is based on successful performance demonstrated through assessed evidence.

Reflective practice
The process through which the teacher or learner continuously learns from the experience of planning, practice, assessment and evaluation. This can improve the quality of teaching and learning over time.

Scaffold learning
The teacher provides appropriate guidance, activities and support to enable students to build on their current level of understanding progressively. They acquire confidence and independence in using new knowledge or skills. This helps students achieve more than they could on their own by operating in the zone of proximal development.

Scheme of work
A set of planned units of learning written by the teacher relating to a topic, subject or stage.

Standards
Standards are clear descriptions used to define quality expectations. The term is used in different contexts in this guide.

- The international qualification standard set by Cambridge International

Cambridge standards relate to the prescribed syllabus and its assessment. Cambridge International sets and maintains standards for our qualifications which are the same for all students in all Cambridge schools. We define:

1. Curriculum standard: This standard relates to the explicit and implicit demand of the content and skills set out in our syllabuses.
2. Assessment standard (also called the attainment standard): This standard relates to the demand of the assessments we set. What students know and can do is measured through assessment processes that are valid, reliable and fair. This means that students' results are seen as accurate measures of their performance in relation to the particular subjects being assessed.
3. Grading standards (also called awarding standards): This standard relates to the achievement we recognise via our grade threshold decisions. Students are awarded a mark/grade accurately reflecting their level of performance.

- School standards

Cambridge International identifies registration standards that have to be met for a school to offer Cambridge programmes. They set out an initial quality benchmark that schools must commit to in order to implement successful Cambridge programmes. Some are absolute standards: the school either meets the standards or does not (for example, secure storage arrangements).

Cambridge International requires evidence of other standards for a school to be registered. For example, assessment outcomes are monitored with clear feedback into teaching and learning strategies, but we do not provide detailed criteria related to these. Schools are responsible for this fundamental aspect of school development. Schools may also be required to adhere to other standards in addition to Cambridge International's, such as those of their national regulatory body, or their chain of schools

Strategic plan
A document that explains the school's strategic priorities for a specified period of time, normally 5–10 years. It includes setting goals, identifying actions to achieve the goals, and considering how resources will be used to achieve the goals that have been identified.

Student-centred learning
In designing the learning activities, the teacher focuses on the needs, abilities and interests of each individual learner in relation to the learning outcomes.

Summative assessment
An assessment of learning that has taken place at the end of a course or unit of study, which is designed primarily to measure achievement. This could also involve ranking, certifying competence or accountability.

Syllabus
A complete description of the aims, content, assessment arrangements and performance requirements for a qualification. A course leading to an award or certificate is based on a subject syllabus.

Teacher support
The framework of courses, resources and guidance that Cambridge International provides to help teachers develop their understanding and delivery of Cambridge programmes.

Timetable
A schedule listing the times and durations of lessons across a specific period of time, often a week. This is sometimes referred to as the teaching schedule.

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Cambridge Assessment International Education



Developing the Cambridge learner attributes

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Foreword

Since their launch in 2011 the Cambridge learner attributes – **confident, responsible, reflective, innovative, engaged** – have been an increasingly visible design principle in the curricula of thousands of Cambridge schools worldwide.

I am often struck when I visit schools by the original ways in which the Cambridge learner attributes are promoted and supported. It was precisely our intention in launching the attributes that they would encourage schools, drawing on well-evidenced ideas about learning, to shape distinctive curricula suitable to their circumstances and contexts.

This new guide revisits the insights into learning and teaching on which the Cambridge learner attributes are built, and suggests how schools can interpret the attributes in a practical way to improve the value of the education they offer. The guide will be useful both for seasoned Cambridge schools looking to make further improvements to the curriculum, and for schools new to Cambridge and wishing to start from a clear understanding of our approach. It is an empowering approach, in which we aim to help schools adopt tools, well-evidenced ideas and flexible resources in order to shape a curriculum which belongs uniquely to the school.

Today's educators are not permitted complacency: everywhere we see, if not downright dissatisfaction with education, then strident demands for improvement. Central to those demands is the idea that students should emerge from the compulsory years of education equipped not only with core knowledge and literacies, but with the abilities and dispositions necessary to be effective life-long learners. When education theories are turned to for help in meeting this challenge, two questions confront schools – how to assess the soundness of a theory, and how to apply it successfully in the classroom.

I believe this guide will answer both needs, by explaining the solid foundations on which the Cambridge learner attributes are based, and showing how to make use of the attributes for the benefit of learners.

Michael O'Sullivan, Chief Executive,
Cambridge Assessment International Education

The Cambridge learner attributes

	Cambridge learners	Cambridge teachers
Confident	**Confident** in working with information and ideas – their own and those of others. Cambridge learners are confident, secure in their knowledge, unwilling to take things for granted and ready to take intellectual risks. They are keen to explore and evaluate ideas and arguments in a structured, critical and analytical way. They are able to communicate and defend views and opinions as well as respect those of others.	**Confident** in teaching their subject and engaging each student in learning. Cambridge teachers know their subject well and know how to teach it. They seek to understand their students and their educational needs. They strive to communicate a love of learning and to encourage students to engage actively in their own learning.
Responsible	**Responsible** for themselves, responsive to and respectful of others. Cambridge learners take ownership of their learning, set targets and insist on intellectual integrity. They are collaborative and supportive. They understand that their actions have impacts on others and on the environment. They appreciate the importance of culture, context and community.	**Responsible** for themselves, responsive to and respectful of others. Cambridge teachers are highly professional in their approach to teaching and they are collaborative and supportive. They understand their actions will help shape future generations and they are concerned about the holistic development of every individual they teach.
Reflective	**Reflective** as learners, developing their ability to learn. Cambridge learners understand themselves as learners. They are concerned with the processes as well as the products of their learning and develop the awareness and strategies to be life-long learners.	**Reflective** as learners themselves, developing their practice. Cambridge teachers are themselves learners, seeking to build on and develop their knowledge and skills through a virtuous circle of reflection on practice – involving research, evaluation and adaptation. They support students to become independent and reflective learners.
Innovative	**Innovative** and equipped for new and future challenges. Cambridge learners welcome new challenges and meet them resourcefully, creatively and imaginatively. They are capable of applying their knowledge and understanding to solve new and unfamiliar problems. They can adapt flexibly to new situations requiring new ways of thinking.	**Innovative** and equipped for new and future challenges. Cambridge teachers are creative, experimenting with new ideas and pursuing an enquiring approach in their teaching. They are open to new challenges, being resourceful, imaginative and flexible. They are always ready to learn and apply new skills and techniques.
Engaged	**Engaged** intellectually and socially, ready to make a difference. Cambridge learners are alive with curiosity, embody a spirit of enquiry and want to dig more deeply. They are keen to learn new skills and are receptive to new ideas. They work well independently but also with others. They are equipped to participate constructively in society and the economy – locally, nationally and globally.	Engaged intellectually, professionally and socially, ready to make a difference. Cambridge teachers are passionate about learning within and beyond the classroom, sharing their knowledge and skills with teachers in the wider educational community.

Introduction

What are the learning habits students need to be successful in school, higher education, the workplace and life in general? This question inspired the development of the Cambridge learner attributes in 2011.

Since we introduced the attributes a number of schools and teachers have asked us for more guidance. This guide is a response to that request. It is intended to complement the *Implementing the Curriculum with Cambridge* guide and the *Developing your School with Cambridge* guide, as well as other resources on the teaching and learning area of our website (**www.cambridgeinternational.org/teaching-and-learning**).

The purpose of the Cambridge learner and teacher attributes is to support the development of five powerful and highly desirable learning habits that will inspire students to love learning and help them to lead fulfilled and successful lives. Students who demonstrate the attributes habitually approach learning by being confident, responsible, reflective, innovative and engaged. They are able to skilfully employ a broad range of cognitive skills and socio-emotional skills (including personality qualities such as resilience, self-motivation and self-regulation) towards effectively managing their performance.

The attributes are interdependent and should be viewed as a whole. Confidence, for example, needs to be grounded in reflection and responsibility so that the learner demonstrates skill and humility in judging how confident they can be that they are right. Learners need to be confident to be innovative, ready to take intellectual risks and not be frightened of making mistakes because they view these as a learning opportunity.

The learner attributes need to be infused into the teaching and learning of all disciplines, subjects and activities. Effective practice starts with small changes, in particular developing a climate that helps to nurture the attributes. Nothing is more important than teachers modelling the attributes and so the teacher attributes correspond to the learner attributes.

A great deal has been written about the failure of some school systems to prepare students properly for life in higher education and the modern world. Too much attention, it is argued, is given to preparing students for examinations instead of developing the learning habits needed to be effective independent learners and team problem solvers. One dangerous misconception is that teachers have to teach to the test to get the highest grades for students. We know that teaching students to be good learners not only prepares them for university and life, it will also result in higher grades in high-stakes assessments.

We hope that this guide will stimulate discussion and the sharing of practice between schools. One of the main sources for the material presented here has been presentations and discussions at Cambridge Schools Conferences over the past six years. These events will continue to provide rich materials and perspectives. To help us create this guide schools from 15 countries have volunteered case studies to share their experiences and practices. We are very grateful for their contributions (see **Appendix 2** for a summary of participating schools).

Our mission at Cambridge International is to support schools around the world to give students the best education for life. Our qualifications and educational programmes are well designed for this purpose. However, they must be supported by effective teaching, learning and leadership practices. This guide, along with all our professional development activities, will help teachers to develop their classroom practice to improve student outcomes. It will also support school leaders to understand what effective schools look like – and how to become one.

How to use this guide

Schools use Cambridge programmes and qualifications in more than 160 countries. Each one of these schools is a unique community with its own identity. We believe that one curriculum prescription or educational approach can never be suitable for all. This guide will help school leaders, governors, proprietors, teachers, parents and students think about how to engage with the learner attributes in their own contexts. Only you know your school and its community, and only you can drive school improvement. Our role is to support you in making the right decisions for your school.

What teachers do in the classroom has the biggest impact on student learning, so much of this guide focuses on effective teaching practice. Teachers themselves need to exemplify the attributes in everything they do: teachers are learners, which is why the attributes are the same for teachers and learners.

Education, however, does not begin or end in the classroom, so we have also given attention to the co-curricular programme and developing a school culture of learning. Throughout the guide we also make references to resources for schools and to complementary programmes run by other organisations.

Chapter overviews

Chapter 1 The learner attributes are closely related to a wide range of educational ideas and approaches and cannot be considered in isolation. Chapter 1 explores some of these and introduces some of the themes that are considered in more detail in later chapters.

Chapter 2 builds on the ideas presented in Chapter 1. It considers the characteristics of a broad, balanced and coherent curriculum that schools need to support the development of the learner attributes. The second part of the chapter focuses on a supportive co-curricular programme.

Chapter 3 looks at the attribute of reflection and the related concept of learning how to learn. It explores the concept that schools need to have a learning, rather than a performance, orientation with reflection at its heart.

Chapter 4 considers innovation and creativity. These are fundamental to all academic disciplines and educational activities, not just the arts.

Chapter 5 looks at the profound impacts of wellbeing and stress on learning and performance, considering the pressures today's students are under. We also look at strategies to deal with stress.

Chapter 6 focuses on how schools can broaden the educational experiences of students through activities designed to nurture confidence, responsibility, compassion and wisdom. These activities have a particular focus on service learning and student leadership.

Chapter 7 looks at our Cambridge Global Perspectives® and Enterprise courses. These provide schools with an educational programme that is particularly supportive of developing the learner attributes.

Chapter 1: The learner attributes in teaching and learning

Overview

The learner attributes are closely related to a wide range of educational ideas and approaches and cannot be considered in isolation. This chapter explores some of these and introduces some of the themes that are considered in more detail in later chapters.

Competencies

A great deal has been written about the 'skills' needed to flourish in the modern, global, interconnected world. The *Assessment and Teaching of 21st Century Skills* researchers (Griffin, McGaw & Care, 2012) group these skills into four categories (see Table 1). While it can be argued that these have always been central to education, there is no doubt that they have become more prominent in the global information age.

Competencies might be considered to be a broader and better description of these than 21st century skills. Competencies are closely related to the learner attributes and refer to specific patterns of behaviour that enable someone to perform a task at the required standard. Competencies can be defined as: 'combinations of knowledge, skills and attitudes, which facilitate the application of knowledge to real world contexts' (see Cook & Weaving, 2013). The OECD (2005) says that competency 'involves the ability to meet complex demands by drawing on and mobilising psychosocial resources (including skills and attitudes) in particular contexts'.

To communicate competently, for example, an individual needs to be both knowledgeable and skilled in the language being used. But this is not enough. Effective communication is likely to draw on other resources including practical IT skills and skilled habits including confidence, reflection, empathy and creativity. Critical thinking, creativity and problem-solving all occur in contexts that will require specific knowledge, skills and understanding. However, they also require a range of intra- and inter-personal skills, and an inclination to demonstrate them.

Table 1

Defining 21st century skills	
Categories	**21st century skills**
Ways of thinking	Creativity and innovation Critical thinking, problem-solving, decision-making Learning to learn, metacognition
Ways of working	Communication Collaboration
Tools for working	Information literacy ICT literacy
Living in the world	Citizenship – local and global Life and career Personal and social responsibility – including cultural awareness and competence

> “Ultimately, education is not what we do to our children. Rather, it is what we do with them, and for them, to bring out the best in each of them, so that they grow up to embrace the best of the human spirit – to strive to be better, to build deeper wells of character, and to contribute to society.”
>
> **Mr Heng Swee Keat**, Minister for Education, Singapore, 2013

The importance of socio-emotional skills / competencies in the learning process

Put very simply, learning happens when students think hard (Husbands, 2014), effectively mobilising a number of different mental processes and resources that are both cognitive (such as reasoning and memory) and socio-emotional (sometimes called non-cognitive skills).

As well as developing knowledge, skills and understanding, learning involves transforming behaviours and attitudes that underpin cognitive functioning, so that students have the inclination and the resources needed to demonstrate competence.

Kautz, Heckman, Diris, ter Weel and Borghans (2014) describe a number of 'non-cognitive skills': these include personality qualities such as perseverance, self-control, attentiveness, resilience to adversity, openness to experience, empathy and tolerance of diverse opinions. They say that these skills:

- predict life outcomes at least as well or better than traditional measures of cognition
- have positive and strong effects on educational attainment. They also help to improve workplace and life outcomes
- can be enhanced, and there are proven ways to do so.

The Cambridge learner attributes provide a cross-curricular language that can support the development of these broader skills and personal qualities. It is also important to note that these skills are particularly valued in higher education and the workplace. Appendix 1 pprovides evidence of the attributes universities are looking for in undergraduates and considers core skills for employability.

Appropriate challenge

Constructivism, a well-established theory that explains how learning happens, has important implications for effective teaching and learning. Constructivism highlights the fact that learners construct their own understanding from their own experiences. Understanding cannot be transmitted from a person (or any resource) without the active engagement of the learner. The most important implication is that learning needs to engage and challenge the learner's thinking so that they are made to think hard. Every learner brings knowledge, understanding and learning habits to the learning process. These need to be recognised and positively challenged for learning to occur.

The concept of the proximal zone of development, introduced by Vygotsky (1978), is helpful in identifying the right level of challenge. The proximal zone of development describes the distance between what the learner can achieve working on their own and the level of their potential development when being guided by a skilled teacher [or peer]. Vygotsky pointed out that learning is optimised when students' thinking is extended beyond what they can easily manage on their own. Teachers have a responsibility to scaffold learning by challenging a student with carefully designed instruction and activities. These make the student think hard and challenge their existing understanding. Sometimes in learning environments expectations are too easy so learners are bored, or too hard so learners become frustrated and demoralised as the leap in understanding expected is too high.

Teachers are responsible for designing and delivering instruction and learning tasks that foster deep learning in the proximal zone of development. In order to achieve this, Hattie (2009) argues that teachers need to be activators not facilitators of learning. Skilled teachers understand where students are in their learning and then plan and implement appropriate activities and instruction to take them to the next level, constantly challenging student thinking.

Vygotsky's ideas are absolutely relevant to developing the learner attributes. Learners need to be made to think hard about what it means to be confident, responsible, reflective, innovative and engaged in all of the contexts of their learning in the school, within and beyond the classroom, so that their understanding of themselves as learners evolves. The concept of enjoying challenge is crucial. In the words of Mihaly Csikszentmihalyi (1990), p3:

'The best moments in our lives are not the passive, receptive, relaxing times…
The best moments usually occur if a person's body or mind is stretched to its limits in a voluntary effort to accomplish something difficult and worthwhile.'

Critical thinking, creativity and the problem of transfer

Critical thinking, creativity and problem-solving relate to particular disciplines. History, science, mathematics and the arts, for example, should all develop the ability to think critically and creatively, and they do this in ways that are not easily transferable to other contexts. This is because the capacity to think critically and creatively is intertwined with knowledge and understanding of a discipline. The main reason for including academic disciplines in the curriculum is that they nurture powerful knowledge (see Young, 2013) with applications that are not easily acquired from everyday experience. Students learn to think competently and solve problems as mathematicians, scientists, historians and artists.

Critical thinking and problem-solving have general applications beyond particular disciplines, of course, and the school's role is to develop these more general competencies. In this sense critical thinking is the ability to identify, analyse and evaluate situations, ideas and information to come up with responses and solutions. Creativity is the ability to imagine new ways of solving problems, approaching challenges, answering questions or creating products.

Because it is not easy to transfer what is learned from one discipline to another, for students to become effective critical and creative thinkers in this general sense they need to be able to reflect on and apply approaches they learn in academic disciplines in an interdisciplinary way. Interdisciplinary approaches need to be based on rigorous disciplinary understanding. Teachers, backed by a supportive curriculum, can help make connections in students' minds between what they learn in one context and discipline and another.

Every student's self-image and learner attributes profile will vary from one context to the next. If a student struggles with mathematics, for example, they are probably not as confident, responsible, reflective, innovative or engaged in this area as they are in others. Helping students identify their passions and areas of strength can form the basis of reflection around why it is that they perform well in one area compared to another. Reflective practices can help them to understand themselves as learners across the curriculum, maximising their strengths and minimising weaknesses.

Intelligence

There are lots of definitions of intelligence. Narrow definitions focus on problem-solving and mental agility in specific analytical problem-solving tasks and are often associated with intelligence quotient (IQ-g) as a general measure.

In a broader sense, intelligence can be understood as a person's ability to adapt to an environment and learn quickly from experience, demonstrating effective problem-solving strategies in a variety of contexts. This broader interpretation recognises the importance of personal competencies and practical problem-solving abilities as well as specific analytical skills.

Robert Sternberg (2009) views intelligence as the ability to achieve goals in life by capitalising on strengths and compensating for weaknesses to effectively interact with different environments using analytical, creative and practical abilities. He points out that successful students in higher education, in life and in the workplace have original creative ideas and the reflective and management skills necessary to make the best of their abilities. Sternberg observed that most of the successful graduate students he worked with were not those with the highest grades but those that demonstrated practical intelligence combined with wisdom and creativity. Practical intelligence is the ability to get things done, to communicate well, collaborate and see a task through to completion. Sternberg argues that intelligence, wisdom and creativity are learnable and can be developed over time. They are forms of 'developing expertise'.

The concept of wisdom, highly valued by Sternberg, is very relevant to the learner attribute of being responsible. It goes beyond being knowledgeable, stressing the importance of using knowledge well to make good judgements.

Howard Gardner (1983) suggested that traditional concepts and measures of IQ fail to measure or explain cognitive abilities. He said that intelligences are in fact multiple. He originally posited the existence of seven intelligences (musical-rhythmic, visual-spatial, verbal-linguistic, logical-mathematical, bodily-kinaesthetic, interpersonal and intrapersonal). He added naturalistic in 1995. Daniel Goleman (1995) popularised the term 'emotional intelligence', referring to the ability to understand one's own and other people's emotions and modify one's behaviour appropriately. He pointed out how critical emotional intelligence is in leadership.

Critics of multiple and emotional intelligence theory say they are more appropriately labelled as aptitudes or abilities, and empirical support for non-IQ-g intelligences is contested. More significantly there have been a number of popular books published suggesting educational approaches derived from these theories are based on poor reasoning and lack of evidence. It does not follow for example, as Gardner acknowledges, that students need to be taught differently depending on their own intelligence profile. Multiple intelligences are not learning styles. Such approaches, which assume students have preferred styles (for example visual, audio, kinaesthetic), have been discredited (see for example Riener & Willingham, 2010).

While recognising these limitations there are very important implications of how intelligence is understood for developing the learner attributes in schools.

1. Inclusive education practices that recognise individual strengths, and stretch and support all students should be valued. It's helpful to have what is sometimes called a 'growth mindset' (see Dweck, 2006 and Deans for Impact, 2015): this is where students and teachers believe that performance can be improved for all through goal-directed hard work. Teachers often have expectations of how particular students are going to progress, which tends to become a self-fulfilling prophecy. Students are sensitive to their teachers' expectations (Muijs, Kyriakides, van der Werf, Creemers, Timperley & Earl, 2014). At worst, this can result in students underestimating their own potential and underachieving.
2. If schools want to give students a broad education, preparing them for life, Sternberg's perspective on intelligence as developing the expertise needed to perform well in different environments has important implications for practice. The global information age requires students to navigate lots of environments using a combination of analytical, creative and practical abilities. This raises questions about what to include in the curriculum. Cheng, for example (2002, see Resources section), argues that there are a number of 'contextualized multiple intelligences' that are increasingly important in the modern world and schools should focus on developing these. The implications for curriculum of developing a wide range of expertise are considered in Chapter 2. The learner attributes can support a wide range of interpretations and approaches that schools adopt.

The importance of emotion and engagement

The importance of emotions in learning, thinking and decision-making is becoming increasingly well understood due to developments in neuroscience. In the past, the assumption was that the emotional and rational parts of the brain were largely separate systems. Immordino-Yang and Damasio (2007) and Immordino-Yang (2016) suggest a very high level of interdependence between effective emotional and cognitive functioning: 'It is literally neurobiologically impossible to build memories, engage complex thoughts, or make meaningful decisions without emotion' (Immordino-Yang 2016, p.18).

Immordino-Yang (2016, pp. 36–40) introduces the concept of emotional thought. This means that emotional and cognitive processes interact to produce thought processes that affect learning and reasoning and underpin decision-making. Having an effective 'emotional rudder' is critical, particularly for students to be able to use knowledge effectively.

Because learners construct their own understanding of the world, bringing prior knowledge and learning habits to the learning process, it is a fact of human nature that we tend to internalise experiences we have based on our existing world view and emotional states. No two people will internalise an experience in the same way. Schools need to nurture emotional awareness by making emotions (as well as reason) an object of reflection and respecting the role emotions play in learning.

Implications for teachers and schools include creating a culture of learning in classrooms so students feel emotionally safe. It is well known that adolescents are particularly concerned about their social image. This needs to be recognised so that students learn to see making mistakes as a learning opportunity and not something to be feared. This is considered in Chapter 5.

The learner attribute of engagement is particularly important. We think more deeply about things that engage us. Fostering emotional engagement in lessons is a great way to help students understand the relevance of what they are learning to their lives. Students need time to engage deeply with concepts and material. An overcrowded curriculum can result in rushing through material without fully engaging with it. One reason teachers need to generate their own schemes of work and lessons plans (see the *Developing your School with Cambridge* guide, Chapter 4:

www.cambridgeinternational.org/teaching-and-learning/developing-your-school-with-cambridge/) is so they can make it engaging and relevant.

Our first case study is a good example of how a school department made learning engaging. It also illustrates how the school supported the development of all the learner attributes with one well-designed activity. The annual writing event helps to improve students' language skills – but that is only a part of its purpose. Students make a personal emotional connection to writers (they become engaged) and produce their own innovative creative response. They are encouraged to discuss ethics, demonstrating responsibility. Reflection is essential to the process, and developing confidence an inevitable outcome, reflected in the students' responses.

Case study 1:

Developing a community of confident and engaged learners at the United World College of South East Asia (UWCSEA)

When planning learning activities for students in the English department at UWCSEA (East Campus), Kate Levy, the Head of Faculty, and her team work hard to consider how students engage with concepts in the English curriculum and the 'real world'.

Each year Kate organises a fortnight-long writing event for students in grades 9 and 10. The 'Write Here' event exposes students to a range of writers, allowing them to hear their stories, their inspirations and their challenges. In this way students make a personal connection to real stories and the power of the pen.

Kate brings in writers from a variety of professions: novelists, speech writers, journalists and those in the marketing industry. They share their experiences of the writing process.

The event is an engaging way for students to:

- develop an understanding of what it means to tell a story responsibly and the ethical concerns that come with it
- ask questions about media representations of people, places, events, and sensitising students to how truths are constructed, and how bias, assumptions and attitudes are embedded in the content, style and structure of the article. The students meet and interview journalists in the parent body about their work
- explore the relationship between words and images through the school's photojournalist writer-in-residence
- consider the relationship between form and purpose. What story and ideas do they want to share, why, and which text type would serve this best?

Case study 1: continued

- consider the values, expectations and sensitivities of the intended audience
- engage in critical thinking. It is quite provocative to hear a photojournalist reveal that he finds photography limited and potentially dangerous as a storytelling tool. Or that same journalist reveal that he felt some sympathy for the Khmer Rouge commandant that he tracked down and helped to bring to justice. Or to meet a teacher-author who had to battle with their editor at every stage to say what they wanted in a book about Western and Asian parenting. Or to hear a spoken word poet (and former refugee and ex-con) reveal how a life of displacement and violence in the US penal system (he spent 18 months in solitary confinement) gave him his poetry.

Students listen intently and talk animatedly about the ideas and the concepts raised by the writers. Many of them make insightful connections between very different speakers. The students' brief is to interview the guests to uncover their stories and then to share those stories purposefully and responsibly.

This ensures high levels of engagement as students respond to issues or stories that they feel connected to. The readers of the students' work (**click here to see an example**) are an authentic audience: perhaps an article for the school publication with an audience of 11 000+, an open blog post or a letter to the Board of Governors. In this way students understand the responsibility of the writer and develop the confidence to communicate appropriate messages in appropriate forms to a wide range of audiences.

By sharing stories through writing, students help to build understanding and compassion in our community. However, through their writing they also build their confidence not only as writers, but as young people with a voice in the community.

The importance of diligent and deliberate practice

Students need goal-directed deliberate practice to develop and embed skills that will help them progress, improve their understanding and apply their knowledge. Deliberate practice focuses on specific areas of weakness or misunderstanding. 'Diligent' refers to the fact it is usually repetitive and involves hard work.

Nowadays, knowledge is freely available on the internet and computers can perform many skill based tasks. One dangerous and false argument is that students therefore do not need to learn content or practise basic skills. This is based on a misunderstanding of what competence is. Form and substance are both equally important. Pak Tee Ng (2016) points out that a master of the martial arts has both substance, developed by repeated diligent practice of basic skills, and the aptitude to apply these in creative and useful ways. The same analogy applies to musicians, scientists, mathematicians, historians, linguists, artists, sportspeople or experts in any field.

One critical role of assessment for learning in classrooms is to identify areas that require focus and deliberate practice that will help students, once they have mastered these, to progress onto the next stage. Often this requires breaking down complex tasks or expectations into smaller component parts and practising to improve these specifically.

One of the limitations of project or inquiry-based approaches, if they are overused or poorly designed, is that students can be asked to demonstrate complex skills without mastering the component skills that are required for competent performance first. The assumption is that these skills are best developed through 'authentic' learning activities that are as much like the desired end product as possible. This may not actually be a good way to develop component skills (see Christodoulou, 2016). This needs to be balanced with the fact that carefully designed project and inquiry work, as part of a broad-based teaching strategy, can support engagement and help students understand component areas that they need to target and improve through deliberate practice.

Critical thinking, creativity, communication and collaboration 'depend on complex reasoning as well as multiple low-level skills that first must be automated' (Abadzi, 2015, p. 35). The importance of the working memory as a bottleneck to processing power in learning and performance is well understood. When learners practise a task like mental arithmetic it becomes automatic and embedded in long-term memory, freeing up space in the working memory for more complex calculations. Longer and

complex chains of skills can only be effectively developed after smaller chains have been formed through practice. Students have limited working memory and this can be overwhelmed by tasks that are too cognitively demanding.

Knowledge is also a prerequisite for sophisticated analysis and understanding. Studying history, for example, should help students to become excellent historians who understand concepts like continuity and change, similarity and difference, cause and effect. This needs to be based on detailed subject knowledge. What that knowledge actually is will vary depending on culture and context. But factual knowledge matters. Acquiring it will help students to understand concepts and transfer their understanding to new contexts.

High-performing musicians and sportspeople understand why they repeatedly practise basic skills, and good schools have a strong expectation of goal directed deliberate practice based on a growth mindset in all disciplines. This is why deliberate and diligent practice, along with all approaches used to support learning, need to become a topic of reflection and discussion in schools.

It is important to note, of course, that the wrong sort of diligent practice, drilling students with what teachers or tutors perceive as the correct answers needed to do well in examinations, is counter-productive. It destroys confidence and engagement, does not teach students understanding of the discipline, is likely to produce worse examination results, and does not prepare students for life. It develops dependency rather than independence.

The importance of reflection in learning

Skilled reflection deepens understanding and permits students to apply their knowledge in new contexts. It is also at the heart of becoming a self-regulated, life-long learner. According to David Whitebread (2017), 'children developing self-regulatory abilities predict academic outcomes and emotional wellbeing more powerfully than any other aspect of children's development'. Chris Watkins (2010) argues that to develop students' self-regulatory abilities, to learn how to learn, schools need to have a learning rather than a performance orientation. This involves making 'learning an object of attention and reflection, in other words to make learning an object of learning'. When this is practised well, students also do better in high-stakes assessments.

The Education Endowment Foundation (EEF) is an independent research foundation in the United Kingdom that investigates the effectiveness of educational interventions. It has shown that metacognitive approaches (a term used to refer to a learner's ability to self-regulate their learning and learn how to learn; see Chapter 3), have consistently high levels of impact. Evidence suggests that the strategies and habits associated with learning how to learn can be particularly effective for low-achieving students. This is detailed in the Teaching & Learning Toolkit: **https://educationendowmentfoundation.org.uk/resources/teaching-learning-toolkit/meta-cognition-and-self-regulation**

John Hattie's *Visible learning: A synthesis of over 800 Meta-Analyses Relating to Achievement* (2009) presents similar findings to the EEF. Hattie stresses the importance of making students' thinking visible, both to the teacher and the student, as a critical process in developing students' understanding of the material being learned. Developing metacognitive awareness and control is identified as having a powerful effect on students' learning and their ability to become independent learners.

Experiential learning, reflective practice and 'challenge education'

Experiential learning engages learners through direct experience of authentic problems and challenges. It is supported by focused reflection as a means of developing skills, acquiring knowledge and developing positive attitudes. The idea is relevant to classrooms, co-curricular activities and service learning.

The extent to which a school engages with experiential learning will depend on its vision, context and culture. All schools should to be concerned with relating learning in classrooms to the students' broader experiences, making learning relevant and engaging. As argued earlier, teaching and learning needs to constantly challenge students' thinking. This will involve using a variety of approaches including: collaborative group work, investigations, fieldwork, projects and presentations in addition to direct instruction and diligent practice.

Practical work is very important in a number of disciplines. To really understand science, for example, students need to practise the scientific method. Practical skills, like any other set of skills, have their own developmental pathway. Actually doing and experiencing a scientific experiment cannot be adequately reproduced by watching one or reading about it in a textbook.

Good reflective practice is fundamental to experiential learning. Kolb (1984) created the cycle of experiential learning (see figure 1), which contains four elements. Concrete experience forms the basis for observation, analysis and reflection. These lead to a new theory or understanding which forms the basis for learning in the next cycle. The critical importance of reflection in learning is considered in detail in Chapter 3. The reflective cycle forms the basis of the Cambridge Professional Development programme for teachers.

Proponents of 'challenge education' advocate the value of taking students outside their comfort zone, requiring them to experience learning in the real world of their communities, the workplace, the wilderness. Being challenged can develop confidence, resilience, practical problem-solving abilities, teamwork and wisdom which aren't easily developed in classrooms. This is considered in detail in Chapter 6.

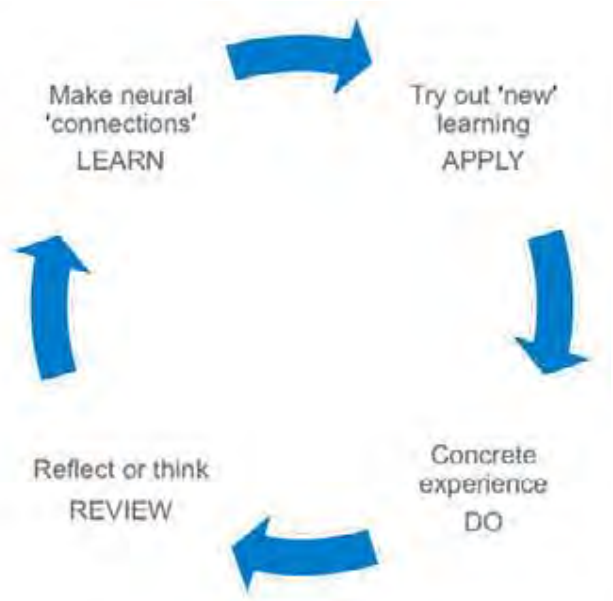

Figure 1: The reflective cycle adapted from Kolb (1984)

The importance of school culture

The educational programme in a school cannot meaningfully be viewed in isolation from the culture in which it operates. Culture creates the environment in which learning takes place and includes hidden and unintentional messages that may contradict the school's stated aims and objectives. Everyone involved in the school community – teachers, administrators, governors, students and parents – will have their own core values that determine how they think and act. These must be consistent with those of the school and supportive of the learner attributes.

Even if the school backs its mission with a clear strategy, it can be difficult to make progress without addressing culture. School culture is complex. Understanding and engaging with school culture is both an essential and often neglected part of school development. Culture operates on different levels. The most obvious is the surface level, which includes the visible aspects of pedagogy, curriculum and the overt behaviours of teachers, administrators and students. But schools also need to engage with deeper structures, including fundamental beliefs and value systems. Problems occur when deep values don't match surface appearances.

What are the implications?

- Curriculum is built on culture so it is in reality a local construct. No two schools are the same. All Cambridge International or any other external organisation can do is support you to develop your own.
- Culture is not easily changed. It is important to understand and respect what your culture is and work with it, gradually evolving practice rather than trying to enforce practices that are not fully understood or accepted.
- Evaluation is central. Are learners actually experiencing what you intend? If not, why not? Often the intended prescribed curriculum is different from the experienced curriculum.
- Recruitment of teachers, school leadership and governors is absolutely critical. A great deal of attention needs to be given to recruiting people who share the school's vision.
- Most learning happens outside the school, at home and in the wider community, so parental understanding and support for the school mission is crucial.

It is important to teach parents about the value of the learner attributes. In many schools parents are very results focused and might only be engaged with the learner attributes at a surface level. The learner attributes will be more effective when they are actively supported beyond the school by parents deeply committed to them. This guide is intended to help with this process by explaining why supporting the learner attributes will improve results as well as prepare students for life.

School culture is not static and it does change over time. Efforts to ensure that the culture is supportive will be rewarded with more effective practice.

Case study 2 is an illuminating example of how a school reflects on learning that brings together a number of ideas discussed in this chapter. The focus is on learning, and the school recognises that this will automatically lead to performance improvements. It concerns itself with cognitive and affective skills, knowledge, understanding and learning habits. Students are supported to become leaders of their own learning with the approach developing confidence, engagement and reflective practice for both learners and teachers. The desired outcomes are concrete in terms of improving Arabic language skills, and the school recognises the importance of culture, and that learning is different in every class and context.

Case study 2:

Doha College's Lesson Study* approach: High-performance learning in an international context.

How to revolutionise your ideas about learning and therefore change your teaching accordingly.

Watch the video at
https://vimeo.com/228214201

As part of the pioneering High Performance Learning (HPL) programme, launched by Professor Deborah Eyre, we reviewed our Lesson Study planning, observation and analysis cycles to gain a deeper understanding of how students learn, and, in particular, if and how students from different cultural backgrounds can be further supported to excel in their learning. We have subsequently adapted our pedagogy as we have engaged in an approach that is much more responsive to students' learning needs and therefore is a more harmonious learning process between the student and the teacher.

Lesson Study, first introduced in Japan in 1870, is an action research focusing on the development of teacher practice knowledge. The exclusive, non-judgemental focus on the learning processes aims to help us as teachers to challenge some of our misconceptions about how students actually learn. This teacher inquiry looked at students as having individual needs rather than as recipients of our teaching, and this encourages teachers to adapt their teaching to tune in much more accurately to the learner.

We were particularly interested how we, as teachers, can best embrace the notion of HPL. An HPL approach in school develops the cognitive skills and attitudes necessary for students to be successful not just academically but also in the wider aspects of their lives. Skills such as risk-taking, meta-thinking or intellectual curiosity are improved by developing their independence, confidence, ability to collaborate, deal with failure and perseverance, to name but a few

Case study 2: continued

qualities. We felt that by engaging in the observation of the learners, taking on board students' perception of their learning and acting upon it, we would gain an insight of how to best to empower our students to strive for excellence.

We chose a sequence of Arabic lessons to case study three students where we could observe a wide array of context. This included students with a range of social, linguistic and cultural prior knowledge and experience of the subject, as well as different learning styles, abilities, personalities and genders. We planned the research lessons collaboratively, then observed the learning (and not the teaching!), interviewed students about their learning experience and, finally, analysed the progress made. That research, data and student feedback then fed into the design of the subsequent lessons. We found ourselves refining our teaching approach to meet the actual requirements of students, rather than what we thought would work from the teacher's point of view.

The process was a remarkable experience for all the teachers involved, on many levels. Firstly, during the planning stage, we realised that as teachers we work in isolation so that our decisions, thinking and judgement processes are not a product of negotiation or compromise but are very subjective and one dimensional. Secondly, we have a pre-conceived idea of what teaching and learning should look like. Having completed team planning based on our 'knowledge' of students and 'half a century' of teaching experience, we watched 'our' lesson fall apart. We realised that so much of our focus is on ourselves and how we deliver material. Although we have incorporated support, assessment for learning and student feedback into our planning, we used it as a consequence to the learning, rather than enabling it to guide the learning itself.

Consequently, against our expectations, a semi-native Arabic speaker underperformed as he was not comfortable with the grouping (which derived, perhaps, from his social background) and, rather than leading the learning, he would only react when prompted. On the other hand, a student struggling with the language felt reassured in a group composed of the opposite sex and performed excellently, displaying self-regulation and critical thinking. What surprised us the most was a high-performing student who reacted as predicted to the lesson but, in the interview, commented how unhappy she was with the timings which prevented her from analysing the topic in depth.

The whole process of the Lesson Study made us aware that to provide a truly personalised learning experience, where students strive to achieve the best they can, we need to positively embrace the fact that students are the leaders of their own learning and not us, or certainly not just us. As teachers, we were reminded that we too have to be constantly learning from the students in order to provide them with opportunities to succeed. The final case study lesson was much more in tune with the actual learning needs of the three case study students, who were now fully engaged in their learning. Thus, although the notion of 'knowing your audience' is an old one, we found the process tremendously valuable. Now back with our classes, we are continuing to question and examine our and students' approach to learning, making the experience continuously evolving and therefore better.

By Anna Davis

*See Resources: Pete Dudley: **http://lessonstudy.co.uk**

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See also presentations given at the Cambridge Schools Conference, Hong Kong, 2017:

www.cambridgeinternational.org/cambridge-professional-development/cambridge-schools-conference/previous-conferences/hongkong2017

Chapter 2: Designing and delivering a curriculum that supports the development of the learner attributes

Overview

This chapter builds on some of the points made in Chapter 1 of this guide and Chapter 2 of the *Implementing the Curriculum with Cambridge* guide **www.cambridgeinternational.org/curriculumguide**.

Schools interested in developing the learner attributes need to develop a curriculum that is broad, balanced and coherent in a number of ways.

A broad and balanced curriculum

The *school curriculum* is sometimes narrowly defined to include only the subjects a student studies within a school year, and in sequential years, as they progress through the school. The concept of curriculum, however, can be considered more broadly to include the *co-curricular curriculum*, which recognises the valued educational activities that support learning beyond classes and subjects. We also need to recognise the hidden or informal curriculum. This is learning that takes place as a result of the culture and climate of the school and is often unacknowledged. Broad definitions of curriculum focus on the overall learning experience a student receives as a result of the educational programme and culture in the school.

It can be useful to distinguish the curriculum, which includes all valued learning, from qualifications and subjects. The curriculum in an excellent school is more than the sum of the qualifications, subjects and activities that are visible on the school schedule. This is because careful attention in curriculum design and implementation is given to learning within, across and between the subjects and activities. All subject teachers support the development of the learner attributes and other qualities identified in the school's vision. Breadth, balance and coherence need to be built in by design.

Here are a few questions to consider for your school. Does the curriculum:

- expose students to learning powerful knowledge and skills that will be useful for them in the future? Is there an appropriate balance of subjects, disciplines and activities?
- make connections in students' minds between what they are learning in different topics in a discipline and between different disciplines?
- teach subjects and disciplines in a way that helps students master basic skills and build on these to develop deep understanding of the material and the ability to apply their knowledge in unfamiliar contexts?
- encourage students' creative contributions?
- help students explore their interests and passions, exposing them to new possibilities?
- nurture learning habits in all subjects and activities that help students understand themselves as learners so that they can help themselves learn new material?
- support the development of emotional, physical and creative competences?
- support the development of collaborative and individual learning habits and skills?
- provide challenge in non-academic practical areas, for example service learning?
- support students' physical and mental wellbeing?

How should the curriculum be organised?

Most schools operate a timetable that divides the day into blocks of time in which subjects are taught. The main reason for including academic disciplines in the curriculum as discrete subjects is that they nurture powerful knowledge (Young, 2013), with applications that are not easily acquired from everyday experience, so that students learn to think critically and creatively as mathematicians, artists, scientists, historians etc. Each academic discipline has its own methodology. Critical thinking in science, for example, requires an understanding of the scientific method and the development of scientific knowledge and understanding which is embedded in practice and theory. As competence and understanding grow, learners can take on more advanced concepts and challenges because they have a solid disciplinary foundation.

The idea of powerful knowledge is based on improving understanding and performance, not just learning facts.

One danger with organising learning in this way is that students, teachers and parents can start to view knowledge as compartmentalised into silos that do not relate to each other. Interdisciplinary understanding, the ability and confidence to traverse disciplines, make connections and develop a holistic appreciation of knowledge that provides new perspectives, is extremely important.

For this reason some schools, particularly at primary level, organise the curriculum around inter-disciplinary or trans-disciplinary topics. This can be effective provided careful attention is given to developing the foundational literacies and knowledge needed for progression. Disciplinary understanding needs to be the foundation on which a rigorous interdisciplinary approach is based, otherwise learning can lead to superficial coverage and confusion. One alternative is to use interdisciplinary courses to complement traditional subjects and timetable them separately. These can provide an opportunity for students to investigate interdisciplinary questions using knowledge and skills acquired across the curriculum. This is the approach adopted in Cambridge Global Perspectives (see Chapter 7).

Excellent schools support the development of interdisciplinary understanding by expecting teachers to plan collaboratively. Teachers need to understand what other teachers are teaching a particular year group in order to make connections with their own classes. This can be facilitated through using curriculum mapping exercises to coordinate the curriculum so that knowledge and skills taught in one class support learning in another.

What subjects and activities should the curriculum provide?

This has to be the choice of the school based on school values expressed in the school mission statement, student age, local culture and national requirements. Curriculum is a local construct owned by the school; no one curriculum prescription is suitable for all.

There are a number of views on how to choose what to include in the curriculum and what weighting to attach to each. Traditionally these have emphasised cultural transmission (Lawton, 1989), where the school's role is to empower students with the knowledge, skills and competencies valued in their culture. Today, we see schools placing increasing emphasis on transformation of society, which is based on the argument that the skills needed to succeed in the modern world are different from in the past (see for example Cheng, 2002). Another perspective highlights the critical importance of helping students to identify and develop their passions. All these perspectives have value and they should be viewed as complementary approaches, not alternatives.

A good curriculum must respect local culture and traditions, recognise the changing nature of the world and encourage students to explore their interests. The terms broad and balanced are relative. There is no one right answer about the extent to which schools will want to engage with ideas presented in this guide. One curriculum prescription is not suitable for everyone and some schools will want to specialise in particular disciplines more than others.

Decisions about what to include in the curriculum have an opportunity cost. There are only so many hours in a school day, and days in a school year. Including more disciplines and/or giving more time to particular disciplines/subjects will have a cost expressed in terms of the best alternatives lost. There is, therefore, a potential trade-off between depth and breadth that schools must consider in designing their curriculum. If a school values the learner attributes it needs to evaluate what it offers to ensure an acceptable degree of breadth, balance and depth in curriculum planning.

One common and dangerous misunderstanding in curriculum design is that adding more subjects or content improves it. In fact the opposite is often true. Covering too much content can reduce the quality of that coverage. Howard Gardner made an important point when he said that 'the greatest enemy of understanding is coverage' (Brandt, 1993). What matters most is the quality of engagement in learning so that students learn to deeply understand the material and can apply that understanding in new contexts. This is considered in more detail in Chapter 3. This was one reason why the phrase 'teach less learn more' was introduced into the Singaporean national curriculum (see Ministry of Education, Singapore, 2015).

One way of optimising learning, given time constraints, is to look for areas of synergy across the curriculum. The statement 'an excellent curriculum is more than the sum of its parts' means that learning is more effective when key processes and competencies are reinforced in all disciplines and activities. The learner attributes are designed to help

schools facilitate this. Creativity and innovation, for example, are fundamental to all disciplines and need to be nurtured across the curriculum. They are not just confined to arts subjects (see Chapter 4).

There is also a danger in trying to create a discrete subject out of everything that is valued when the desired learning outcomes are better infused in the curriculum as a whole. Learning how to learn and personal development are concerned with habits and skills that are foundational to performance in all areas, and therefore the concern of every teacher and class. Students need to experience them as habits reinforced across the curriculum. Everything that has value does not need to result in a qualification.

Another important consideration to be aware of in designing the curriculum is the fundamental importance of language. Language is privileged in the curriculum as learners are dependent on their understanding of a language to access knowledge and skills in all subjects taught through the medium of that language. This has direct implications for the student's first or best language and the language of instruction of the school. Students attending international schools are often learning the curriculum through the medium of English, so developing a high level of English language competence will help them learn.

It is also very important that all students continue to develop their first or best language, this can be neglected if attention is just focused on English. All subjects students learn provide rich opportunities for language development and teachers need to be language aware. Students can only become more confident, responsible, reflective, innovative and engaged if their powers of expression and communication, mediated through language, are enriched. Language is also critical to developing student identity and international understanding. Cambridge has published a number of resources on language awareness and bilingual education recognizing the critical importance of language in the curriculum. Further information is available at: **www.cambridgeinternational.org/programmes-and-qualifications/bilingual-education/**

Curriculum coherence, assessment and teaching that support deep learning

We talk regularly to universities about our syllabus development. They often tell us how important it is for them that students understand key concepts and ideas deeply, and can take learning from one area and apply it elsewhere in novel ways. It is mainly for this reason that the high-stakes summative assessment we provide is linear, which means it takes place at the end of the course. This allows students more time to think, mature and practise before they are assessed. Teachers have more time to engage students' interests and support their development through assessment for learning rather than assessment of learning.

Coherence is important to support deep learning. This is different from the concepts of breadth and balance considered earlier. A coherent curriculum organises learning in a carefully planned and aligned 'spiral' instructional system. Oates (2010, p. 13), citing the work of Schmidt and Prawat (2006) relating to effective practice in national education systems, points out: 'A system is regarded as coherent when the curriculum content, textbooks, teaching content, pedagogy assessment and drivers and incentives all are aligned and reinforce one another.' The same principle holds true for effective schools. Curriculum, assessment and pedagogical practice are well aligned and mutually supportive. Learning experiences are thoughtfully sequenced, respecting students' developmental stages.

Our syllabuses, teacher support material, teacher professional development and assessments are designed by subject experts to ensure a smooth progression from primary to upper secondary. We plan the progression carefully so it respects the progression of knowledge and understanding needed to advance to the next stage in each discipline. Subject curricula are based on key concepts, principles, fundamental operations, key knowledge and the learner attributes.

We use ideas about important concepts in a number of ways. Threshold concepts are the ones that students need to understand before they can engage with more difficult material as they progress through a discipline. These are fundamental to curriculum and assessment planning and are used to decide what goes into syllabuses, and to define the level of demand expected, from primary to upper secondary. The order is critical and students need to be exposed to more complex ideas earlier on before they can be

expected to master them. Learning progressions need to be based on a learning spiral where students return to knowledge, concepts and skills repeatedly.

The term 'key concept' is specifically used by Cambridge International to describe essential ideas that help learners to develop a deep understanding of their subject and make links between different aspects. Key concepts may open up new ways of thinking about, understanding or interpreting the important things to be learned. These include a range of significant ideas and organising concepts that help learners to develop a deeper understanding, making sense of their subject and making links between different aspects of it. They can be transformative in nature and can be compared to a door or portal (Meyer & Land, 2003), opening up new and previously inaccessible ways of thinking about the important things to be learned. They support improved ways of understanding, interpreting or viewing, which helps the learner progress. As Cambridge International redevelops its syllabuses, key concepts are being emphasised more clearly (see, for example, Table 2) with the intention of helping students gain:

- a greater depth as well as breadth of subject knowledge
- confidence, especially in applying knowledge and skills in new situations
- the vocabulary to discuss their subject conceptually and show how different aspects link together
- a level of mastery of their subject to help them enter higher education.

Table 2: Example of key concepts from Cambridge International A Level Geography

The key concepts on which this [Cambridge International A Level Geography] syllabus is built are set out below. These key concepts can help teachers think about how to approach each syllabus topic in order to encourage learners to make links between topics and develop a deep overall understanding of the subject. The teaching support package gives teachers guidance on integrating the key concepts into their teaching. See page 7 for more information on our teacher support.

1. Space: the implications of spatial distributions and patterns of a range of physical and human geographical phenomena.
2. Scale: the significance of spatial scale in interpreting environments, features and places from local to global, and time scale in interpreting change from the geological past to future scenarios.
3. Place: the importance of physical and human characteristics which create distinctive places with different opportunities and challenges.
4. Environment: how the interactions between people and their environment create the need for environmental management and sustainability.
5. Interdependence: how the complex nature of interacting physical systems, human systems and processes create links and interdependencies.
6. Diversity: the significance of the similarities and differences between places, environments and people.
7. Change: the importance of change and the dynamic nature of places, environments and systems.

Teachers are expected to embed the key concepts through the study of the topics, both in general and specifically through examples and case studies.

Embedding the learner and teacher attributes in teaching practice

It is the teacher's responsibility to take Cambridge syllabuses and teacher support material, and develop appropriate schemes of work and lesson plans that provide engaging and locally relevant classroom activities for students. Cambridge syllabuses and support material also emphasise the learner attributes in subject-specific ways that complement their more general use across the curriculum (see the example in Table 3).

Table 3: The learner attributes in Cambridge Mathematics

Confident	In using and sharing information, ideas and mathematical techniques to solve problems. These skills support work in other subject areas as well as in mathematics.
Responsible	By learning and applying skills which prepare them for future academic studies, and also help them to become numerate members of society.
Reflective	Through the development of insight into the connections between different branches of mathematics and the steady build-up of mathematical and modelling skills.
Innovative	Through solving both familiar and unfamiliar problems in different ways, selecting from a range of mathematical and problem-solving techniques.
Engaged	By the beauty and structure of mathematics, its patterns and its many applications to real-life situations.

While developing a culture of learning in a school that emphasises effective learning habits will create a supportive environment, nothing is more important than teachers being good role models, exemplifying the Cambridge learner attributes by being confident, responsible, reflective, innovative and engaged themselves.

> “How can we expect inspired students without inspired teachers?”
>
> **Pak Tee Ng** at Cambridge Schools Conference, 2016

Collaboration

One potential limitation with curriculum in schools is that learning tends to be focused on the individual. Most summative assessment practices, notably examinations, assess the student's own knowledge and problem-solving abilities. Students need to learn to function effectively as team members and leaders as this an important ability needed to get on in life and the workplace. They also need to learn to solve problems collaboratively. The Organisation for Economic Co-operation and Development (OECD, 2013, p. 6) defines collaboration as follows:

'Collaborative problem-solving competency is the capacity of an individual to effectively engage in a process whereby two or more agents attempt to solve a problem by sharing the understanding and effort required to come to a solution and pooling their knowledge, skills and efforts to reach that solution.'

Collaborative problem-solving requires teamwork where individuals actively, responsibly and productively work towards a shared goal. This requires high levels of emotional competence and inter- and intra-personal awareness. Collaboration is more sophisticated than cooperation. A cooperative task may involve dividing up the work equally and everyone getting on with their share. Collaboration requires collective intelligence and agility. Individual responsibilities may change as progress or obstacles are met. Many schools tend to support cooperative learning rather than collaborative learning.

Being an effective collaborator requires additional habits and skills to being a good individual learner. Students need to be able to define the problem and ensure they have a joint understanding of what is being asked, think critically as a group, communicate

and reflect on how well the group is progressing towards solving the problem. Effective collaboration is linked to the concept of student leadership considered in Chapter 6. Leadership requires monitoring that the group is doing the right things towards achieving the set task and adjusting practices and work as required. Leadership should be viewed as a process rather than a position of responsibility, and is often distributed with different individuals contributing as leaders in different ways and at different times.

Schools that focus on the learner attributes have a responsibility to provide opportunities for collaborative learning through well-planned learning activities. Many academic disciplines can provide such learning opportunities through collaboration, including social science fieldwork and science practicals, or project work in courses like Global Perspectives and Enterprise (see Chapter 7). The co-curricular programme provides opportunities for group work and collaboration, as many of the case studies in this guide illustrate. Chapter 6 considers how 'challenge education', service and leadership can support the development of collaborative skills.

The assessment of collaboration requires careful consideration of an individual's contribution to the success of a group. This means teachers need to analyse the processes that led to group performance, and reflect on individual and group performance. The process of collaboration, as well as the product of the group, needs to be assessed at least formatively in terms of reflection and feedback.

Information literacy and research skills

Students today are bombarded with information. It has never been more important to learn how to argue critically, evaluate evidence and handle information wisely. Information literacy is closely related to learning how to learn (considered in Chapter 3) and needs to be the concern of all disciplines. Many disciplines focus on critical thinking skills and the evaluation of evidence. These are usually context specific but students can learn to apply them more broadly through supportive teaching and appropriate reflection.

Learning how to research is vital for success in higher education and the world of work. This means being able to define then investigate a significant question, evaluate evidence and prepare and communicate an argument in extended writing and through spoken communication. It is also an engaging process that will develop confidence, innovation and responsibility.

A well-balanced curriculum provides students with the opportunity to research as a part of their learning experience. It is important that teachers help students to understand research methodology and to improve their research skills. As with any learning activity it is important that students are made to think hard and reflect on the process of research. Cambridge Global Perspectives, highlighted in case study 4 and considered in detail in Chapter 7, is a programme specifically aimed at developing critical thinking and research skills. There are also many possibilities for the co-curricular programme to support the development of practical critical thinking and research. Case study 3 provides one example of this.

Students at Frensham School, Australia (*case study 4*)



Case study 3:

Supporting the development of research skills at The Perse School, Cambridge, UK

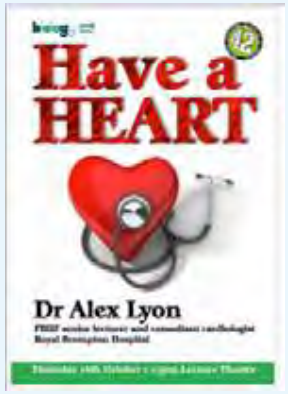
Organising a structure: Independent learning and research

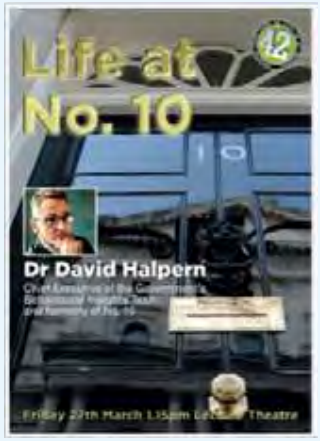
Research and scholarship are at the heart of The Perse School's learning culture. The school supports the development of pupils as effective independent learners by a programme of embedded research skills built into the curriculum. There is a strong emphasis on helping students make progress in their capabilities as researchers. Every year group is offered activities ranging from reading groups to lunchtime lectures with experts and external partnerships, trips and visits. Extension tasks and booklets for every subject are issued at the start of the year with a range of challenging material to dip into. The emphasis is on supporting pupils to become independent learners by making good choices about how to direct their time and extend their learning.

Pupils are offered a pipeline of research opportunities as they move through the school, with an increased level of depth and challenge at each stage. These begin with internally designed and assessed independent investigation programmes with teacher mentor support in Years 7 and 8, with the option of undertaking an externally validated research qualification in Year 10 and Year 12 respectively.

Pupils have the opportunity to develop great depth of subject knowledge at the same time as learning valuable skills in project management, the critical evaluation of source material and metacognition and reflection. This emphasis on research-driven learning as a creative approach to the curriculum reflects the school's location and values, situated as they are in Cambridge, a global centre of scholarship.









The school's lecture series 'The 42' draws on volunteer speakers to provide a weekly lunchtime focus lecture with Q&A opportunities. It draws a wide student audience from all year groups

The co-curricular programme

Co-curricular refers to learning experiences, usually organised into activities and programmes, which complement what students are learning in the classroom. Another term often used with a similar meaning is extra-curricular activities, 'extra' referring to the fact that these fall outside the scope of the 'normal' curriculum. Co-curricular is a better term as it suggests a central idea in this guide that this valued learning is not extra to the curriculum but fundamental to it.

The learning experiences provided by the co-curricular programme complement and support what the students are learning in the academic programme. They play a particularly important role in developing foundational competencies including self-understanding, communication, leadership, a sense of responsibility, health and wellbeing, confidence and intra- and inter-personal skills.

For this reason, schools that value the learner attributes consider the co-curriculum carefully. The culture of the school is permeated with a sense of valuing worthwhile student activities and these are considered on a par with academic achievement.

It is possible to broaden the concept of the co-curriculum to include activities that the school encourages which are actually provided in the community beyond the school. The extent to which a school is able to provide a rich choice of activities will be constrained by its context and resources. One way to broaden these opportunities is for the school to discover, support and develop opportunities for students to use clubs and resources available in the local community, recognising student participation beyond the school.

As with the academic curriculum there is no one formula for what to include in the co-curricular programme. Typically schools support activities and programmes in: physical recreation, performance arts, community service, student government, recreational hobbies, health and social education, outdoor pursuits and work experience. Many of the best programmes and activities, a number of examples of which are illustrated in case studies in this guide, are student led and managed. Activities and opportunities should reflect the local culture and community, and provide one opportunity for placing the school as a contributing force to community cohesion and development.

How should student participation in co-curricular areas be organised?

Again, this is a decision for each school. Some schools require students to do certain activities and reward credit towards school diplomas and graduating requirements. Other schools are more flexible and voluntary in their expectations.

Structure provides clarity. Well-designed compulsory co-curricular programmes will give students a wide range of experiences. On the other hand, too much compulsion can have unintended consequences. For the learner attributes to become life-long habits it is essential that learners pursue co-curricular activities because they want to, not because they are another requirement to be ticked off. Ultimately we want students to behave in certain ways because this leads to personal fulfilment and enjoyment.

This does not mean that assessment and evaluation of student participation in co-curricular activities should be ignored. Assessment needs to be fit for purpose and we need to assess what we value, not just value what we assess.

How should student performance in the learner attributes be assessed?

Assessment needs to develop self-awareness and responsibility in learners. It also needs to give them the belief, desire and knowledge to improve. With this in mind valid assessment approaches could include:

1. **Self-evaluation instruments and reporting**. This could be done in a number of different ways, respecting the students' age and school culture. Quality is more important than quantity in order to preserve enthusiasm and commitment. Options include:
    - Students complete a self-evaluation as part of the end-of-term report sent home to parents.
    - Students complete self-evaluations of their performance in particular tasks or activities, including individual and group work.

2. **Students running parent–student meetings**. They lead the conversation with their own reflections on how they are doing and what they need to do to improve (as demonstrated in Case study 10 in Chapter 3).
3. **Process journals, e-portfolios or blogs** where students can write about their learning journey and reflect on it.
4. **Involving students, where appropriate, in designing assessment rubrics** that include learner attribute criteria. Students can then evaluate their own performance individually or collectively.
5. **Displays of student work and school activities** that exemplify the learner attributes.

The following four case studies illustrate different approaches schools have developed in order to support the development of the learner attributes and other valued learning highlighted in their missions. Each approach has been designed by the school to reflect its own context and culture.

The Jamieson Programme at Frensham provides structured challenge in a number of areas beyond traditional academics. The school includes Cambridge Global Perspectives as a requirement that supports the development of global citizens, together with The Duke of Edinburgh's international youth award and other activities.

The Global Citizenship Award at ShenZhen College of International Education is an integrated programme. It ensures that the educational objectives of the College are being addressed through the academic and the co-curricular programmes. This started with a sophisticated mapping exercise of skills and habits the school identified as important to the curriculum. They then added a co-curricular dimension, along with ways of encouraging and recording student involvement.

Bromsgrove School created their own bespoke Learner Profile supported by the Bromsgrove Award and Badge system.

Confucius International School, Qingdao introduced the Six Arts curriculum in order to develop a unique programme blending the best of Confucian and Western traditions.

Case study 4:

Jamieson Programme at Frensham, Australia: Grit, gratitude and good humour.



Watch the video at
https://vimeo.com/228213301

Unique to Frensham, the Jamieson Programme is built on the belief that teenagers are risk takers growing up in a complex and rapidly changing world. In order to thrive they must develop empathy, self-control, integrity and grit – as core personal attributes. Based on the precept of experiential education, the programme offers real-world challenge through engagement in new physical, intellectual and emotional experiences in a secure, stimulating environment that is inherently exciting and immensely rewarding.

The Cambridge IGCSE® course Global Perspectives, which the school added to the Jamieson Programme in 2012, is a perfect fit in terms of preparing students to be global citizens of the 21st century. Developing global competence is a core focus of the Jamieson Programme, whose goals are closely aligned with the Cambridge learner attributes.

Responsibility in action, or 'character in action', is a fundamental principle that guides students in a diverse range of activities and leadership experiences. Frensham girls are encouraged to embrace challenges and undertake service activities with 'grit, gratitude and good humour', qualities that awaken a belief in themselves that will stay with them throughout their lives.

Frensham's Jamieson Programme

From its origin in 1986, the Jamieson Programme has become an integral component of Frensham's curriculum. The Programme continues to develop, as each element is tested and reviewed and each activity refined.

Case study 4: continued

The Jamieson Programme has four goals, which provide a focus for students aged 12–16 in Years 7 to 10:

1. Global citizenship: to develop an understanding of your responsibilities as a global citizen; to develop an intelligent perspective about other cultures.
2. Health/fitness and physical challenge: to develop and sustain a healthy lifestyle; to understand and develop your physical capabilities.
3. Critical, ethical and flexible thinking: to develop a love of learning; to become a skilled and critical user of technology; to become a disciplined learner; to develop creativity coupled with a strong work ethic; to develop a deep understanding of mathematics, literature, science, history and the arts.
4. Responsibility, service, leadership: to be the best you can be; to understand and act on your environmental responsibilities; to develop an awareness of, and to act on, your responsibilities to help those less fortunate.

The students meet these goals through regular programmed activities tailored to the needs of each year group. Activities include:

- community service
- outdoor education
- leadership (through, for example, the School Forum and peer support programmes)
- specialised courses in subjects such as presentation skills, personal development and financial literacy
- Jamieson Weekends (when all students remain at school to participate in planned activities)
- Jamieson Week (the final week of the school year full of activities dedicated to the goals of the Jamieson Programme).

The Jamieson Programme – Year 9 experience

The Jamieson Programme for Year 9 targets specifically their personal needs at what is a crucial time in adolescent development. In addition to ongoing involvement with their Year 12 mentors and acceptance of increased responsibility with Junior Houses, each fortnight Year 9 students engage in a mandatory extended-day curriculum from 13.30 to 20.30. During this time they undertake the Cambridge IGCSE Global Perspectives course, exploring key global issues from a personal, local, national and global perspective. The extended day also gives the Year 9 students the opportunity to work together as a whole cohort in a range of activities spread across each term including: community service, environmental projects, personal fitness, health and well-being workshops and challenges, religious studies and study skills.

Integral also is participation in a three-day residential Global Forum, where Year 9 students have the opportunity to engage with global thinking in a range of collaborative workshops with guest speakers from local, business, sporting, social justice and artistic communities. The Global Forum is directly linked to the Cambridge IGCSE Global Perspectives course and the three-day immersion in ideas adds significantly to the outcomes achieved by all students. A cornerstone of the Global Forum experience is working, learning and playing alongside students and teachers from an Intensive English Learning Centre (a school for students who have recently arrived in Australia).

Year 9 also engages in a mandatory programme associated with The Duke of Edinburgh's Award scheme. This includes an outdoor education camp, a caving expedition, overnight expeditions and service activities. Students can also undertake additional service activities that contribute to The Duke of Edinburgh's Award, such as visiting nursing homes, environmental management and the Addis Ababa Fistula Hospital Project. At the end of the school year, Year 9 joins with the rest of the school in Jamieson Week, a whole-school focus on Jamieson Programme activities.

Student reflections

“We are emerging as global thinkers who do not just picture our own lives but consider the perspectives of others.”

Holly, Year 8

“You don't have to do something extraordinary in your life to make a change in the world; little steps can have a big impact.”

Sophie, Year 9



Case study 5:

The Global Citizenship Award at ShenZhen College of International Education (SCIE), China

Most schools have a set of educational objectives, skills and attributes, which the curriculum and extra-curricular programmes are designed to promote. A similar set of objectives are defined by Cambridge as the learner attributes. However, unlike examination results, which provide objective data against which to measure performance, the softer skills and attributes – teamwork, leadership, environmental awareness, empathy – tend not to be so easily quantified and measured.

The story began at SCIE after the Council of International Schools accreditation visit suggested that a clearer definition of international-mindedness should be created and that measures to assess the effectiveness of its implementation be devised. The first stage involved identifying the broad aims of the curriculum, supplemented by a range of activities designed to promote those skills.

The first area to be developed was international-mindedness. The process began with staff seeking to identify what was meant by international-mindedness in the context of our school and our country. We agreed upon a set of strands, running through the whole curriculum. In each scheme of work, opportunities were identified to address the most appropriate strands. These key activities, which addressed each strand, were then plotted on a **whole-school patchwork**, showing how the various strands are embedded in the curriculum. A similar process then took place for the remaining areas, including social skills and thinking skills.

The various skills and attributes within each category were identified, individual courses were examined and opportunities for promoting these skills and attributes were considered and plotted on the patchwork. We were then able to show how the various aspects of the curriculum are embedded into the courses.

Case study 5: continued



SCIE set out clearer definitions for thinking skills and social skills



We could also map the development of these skills throughout the four-year teaching programme on each subject curriculum map. View example of business studies curriculum map at **www.cambridgeinternational.org/images/411331-business-studies-curriculum-map.pdf**

In addition to identifying the activities, we felt that it would be beneficial to develop a method of recording students' involvement. Given the difficulty of conducting formal assessments of these skills and attributes, we felt that student participation could be recorded as evidence of the process taking place. At the same time, we had a separate community service and extra-curricular programme known as the Development Award. This required students to meet certain standards in non-academic activities and community service.

Case study 5: continued

Rather than having two separate awards, the sensible option was to combine these two into the Global Citizenship Award. By doing this, we created an integrated programme which ensures that the educational objectives of the College are being addressed through both the taught curriculum and co-curricular programmes.

The Global Citizenship Award was created with four levels:

Y10 **Global Freshman Award**

Y11 **Global Sophomore Award**

Y12 **Global Citizen Award**

Y13 **Global Leader Award**

At each level, there are three standards available: Award, Merit and Distinction. Students earn points from their teacher, which vary depending on whether Bronze, Silver or Gold is awarded, and by the nature of the task. For example, each hour of community service earns 10 points. We required a system to allow teachers to input records of student activities and for students to be able to check their progress towards the award. This was done via the College Information Management System, which had the added benefit of creating a record of activities and achievements for students. This record can be used when writing pastoral comments for reports or when writing references for university applications, and can generate a non-academic transcript for students to exemplify their rounded education experience.

The programme was introduced in 2016–17. It will take at least one year to find out how many points students earned on average and to set the future levels accordingly. As time passes it may be necessary to adjust boundaries as students become more engaged in earning points. To add validity to the Global Citizenship Award programme, and to increase the interest of students and parents, it was decided that three of the annual student scholarships should go to the highest scorers in the Global Citizenship Award.

We hope that the end product will be an integrated system, which effectively recognises and records all aspects of the students' non-academic experience at the College. It will promote the skills and attributes which form part of the core values of the College and will generate a record of achievement for students. The project also helped to engage staff in the schemes of work and aligned them more closely with the College's educational goals. On the whole, it was a valuable and worthwhile project.

> "The Global Citizenship Award ensures that the educational objectives of the College are being addressed through both the taught curriculum and co-curricular programmes."

ShenZhen College of International Education

Case study 6:

Developing the Cambridge learner attributes at Bromsgrove International School, Thailand

The reward system at Bromsgrove is unique in developing our learners' awareness of the world around them and of the competences they are developing every day within and outside the classroom. We have created our own, bespoke Learner Profile, which all staff use to develop attributes which all our students need in order to become successful global citizens who are reflective, creative and responsible, and also ready to lead and inspire others.

All students at Bromsgrove from early years through to Year 13 engage actively with the Learner Profile. Recently we recognised the need to develop the areas of service and leadership among our students as the next stage of the development of the Learner Profile. So we came up with the concept of the Bromsgrove Badge and the Bromsgrove Award. These, along with the Learner Profile, help our students to develop the competences required for success in their Cambridge exams.

The Bromsgrove Badge and the Bromsgrove Award are opportunities for students to show how they have progressed in the different aspects of the Bromsgrove Learner Profile and also look at Service and Leadership in the Upper Key Stages. Primary students work towards the Bromsgrove Badge, with Years 2–4 focusing on the core attributes of the profile. Students have to complete six tasks to earn each Bromsgrove Badge. We decided that a more prescriptive approach would be most effective with our youngest learners. During Years 5 and 6, students engage in student leadership activities and in Year 6, complete a student leadership project that counts towards their Bromsgrove Award.

In Secondary, students independently choose a specific attribute to work towards to develop their unique portfolios, with different Key Stages focusing on different areas. They set their own targets, with guidance from their form tutor if required, to allow them to explore areas about which they are truly passionate. When they have achieved the targets, they will have earned the right to apply to be considered for one of the Bromsgrove Attribute Awards.

In Key Stage 3, students focus on the following attributes:

Curiosity, Risk Taker, Determination, Team Player, Positivity, Kindness, Independent

In Key Stage 4, we add:

Service, Creativity

The award culminates In Key Stage 5, when they also explore:

Leadership

To develop this attribute, Sixth Form students lead the student committees. They also lead extra-curricular activities, which has a direct impact on younger members of the school community.

An important part of the scheme is that students are required to take ownership of their work. They can document their progress in any medium, and the response has been exceptionally creative and varied.

Students are encouraged to see the Bromsgrove Badge and the Bromsgrove Award as a long-term project, not simply a tick-box activity. This complements our school's vision to develop life-long learners who are committed global citizens. We celebrate the success of students in a termly Bromsgrove Award assembly and it is also a key part of our BEAM (Building Effective Attitudes and Mindsets) Pastoral Programme.

View Bromsgrove Badge 'curious' tasks at: **www.cambridgeinternational.org/images/410941-bromsgrove-badge-curious.pdf**

View Bromsgrove Badge 'independent' tasks at: **www.cambridgeinternational.org/images/410943-bromsgrove-badge-independent.pdf**

View Bromsgrove Badge 'teamwork' tasks at: **www.cambridgeinternational.org/images/410942-bromsgrove-badge-teamwork.pdf**

Case study 7:

Bringing ancient education traditions into the 21st century at Confucius International School Qingdao, China (CISQD)

Confucius International School in Qingdao, China (CISQD) was founded in 2009 by the direct descendant and current head of the Confucius family. It is the first educational initiative of its kind to unite the best practices in Western teaching with Confucian teaching and principles.

Confucius considered that a primary goal of education was to produce capable individuals (xiancai) – whom he also called *shi* (gentlemen) or *junzi* (men of quality) – who 'combined competence with virtue' and whose subsequent careers in administration and government would bring about the ideal of a kingdom managed with integrity. Confucius believed that education plays a fundamental role in the development of society and of individuals. By raising individual moral standards, it renders society more virtuous. His ethics, philosophy and politics are a cohesive unit, rooted in 'humanity' or 'benevolence' (*ren*).

Confucius's philosophy of education focused on the 'Six Arts': archery, calligraphy, computation, music, chariot-driving and ritual. These concepts have been modernised and made relevant to the modern world at CISQD, while retaining their essential meaning, to form the basis of a broad and balanced curriculum. Newly enrolled CISQD students are provided with the Confucian Six Arts Passport, which will document their engagement in all aspects of the Six Arts throughout their time at CISQD. Documentary proof of continuous engagement in the Confucian Six Arts is a graduation requirement of CISQD and will be a component of the graduation requirements for all CIS schools.

See Case study 16 in Chapter 6 which considers how the Confucius International School develops student leadership based on the Six Arts programme.

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Chapter 3: Reflection

Overview

Chapter 1 briefly considered how skilled reflection is critical to becoming an engaged, self-regulated, life-long learner. This chapter looks at the attribute of reflection, and the related concept of learning how to learn, in more detail. It starts by considering what reflection is and exploring its key role in the learning process. It then considers implications for students, teachers and schools. This chapter is closely related to Chapter 4 of the *Developing your School with Cambridge* guide (available at **www.cambridgeinternational.org/images/271309-teaching-cambridge-programmes.pdf**). A number of useful resources are provided at the end of the chapter that expand on the ideas developed in it.

What is reflection?

Reflection is an active, disciplined and deliberate strategy. It is incorporated into the processes and activities of teaching and learning to help improve understanding. It is, therefore, much more than a review and justification of what has happened at the end of a period or activity.

This chapter considers two closely related types of reflection:

1. Reflecting on what is being learned to support deeper understanding of the material.
2. Making learning itself an object of reflection to support student self-regulation and learning how to learn.

Reflection is necessary for learners to be able to effectively manage complex thinking processes and outcomes. For Dewey (quoted in Moon 1999 p. 12), reflection is an essential part of the process of making meaning that pushes learners from one experience to the next: 'The kind of thinking that consists in turning a subject over in the mind and giving it serious thought.' Reflection is 'active, persistent, and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it, and the further conclusions to which it tends.'

Reflection helps students to develop a deeper understanding of what they are learning through making new connections and relating different ideas. To Perkins (1992 pp. 77–79), demonstrating understanding involves being able to carry out a number of performances that both show understanding of a topic and help advance it. Perkins illustrates this in the context of Newton's First Law of Motion (every object in a state of uniform motion tends to remain in that state of motion unless an external force is applied to it). If students are given the opportunity to reflect upon this concept, with appropriate teacher guidance, exploring key ideas and considering their implications, they are then able to:

- explain this law in their own words
- provide further examples of the law at work (exemplify)
- apply the law to new situations and phenomena not yet studied
- offer up evidence in defence of the law (justify)
- note the form of the law and draw from it any further general principles about the physical world (contextualise and generalise).

Critically, the process of reflection is necessary for the above to happen – the ability ('performance') to extrapolate and generalise comes as a consequence of thinking

> "Cambridge students understand themselves as learners. They are concerned with the processes as well as the products of their learning and develop the awareness and strategies to be lifelong learners. Cambridge teachers are themselves learners, seeking to build on and develop their knowledge and skills through a virtuous circle of reflection on practice – involving research, evaluation and adaptation. They support students to become independent and reflective learners."
>
> **(Cambridge learner reflective attribute)**

deliberately and hard about the intended constructs (the important things we want our students to learn) and practising them in relation to different questions. Reflection, therefore, is a critical activity that helps develop deeper understanding of the material being covered.

Because all learning is constructed in learners' minds, learning cannot simply be transmitted from a teacher or a book to the learner. A teacher who is instructing the whole class needs to incorporate reflective strategies and activities into lesson plans as much as a teacher who is overseeing group or practical work. The best whole-class instruction is highly reflective.

The reflective student: learning how to learn

'Effectiveness as a learner hinges on the ability to be versatile as a learner. To have a rich view of learning and a learning orientation which is in turn linked to the ability to plan, monitor and review one's learning' (Watkins, 2010).

Metacognition (thinking about thinking) is a general term to describe the processes involved when learners plan, monitor, evaluate and subsequently make changes to their learning behaviours. Another term developed by Watkins (2010) to convey the very specific idea of reflecting on and regulating learning, is 'metalearning'. We use the two terms interchangeably in this guide.

In 1999, the US Department of Education's Office of Educational Research and Improvement (OERI) commissioned the National Research Council (NRC) to synthesise and review the research literature on the science of human learning. The subsequent report, How People Learn (Donovan, Bransford & Pelligrino, 1999), suggested important implications for the design of curricula, teaching, assessments and learning environments. It highlighted three findings that had both a solid research base and strong implications for how students learn and therefore how teachers should teach. These are consistent with the description of constructivism as a theory that explains how learning happens (which we covered in Chapter 1):

1. 'Students come to the classroom with preconceptions about how the world works. If their initial understanding is not engaged, they may fail to grasp the new concepts and information that are taught, or they may learn them for the purposes of a test but revert to their preconceptions outside the classroom.'
2. 'To develop competence in an area of inquiry, students must: a) have a deep foundation of factual knowledge, b) understand facts and ideas in the context of a conceptual framework, and c) organise knowledge in ways that facilitate retrieval and application.'
3. 'A metacognitive approach to instruction can help students learn to take control of their own learning by defining learning goals and monitoring their progress in achieving them.' (Donovan et al, 1999, pp. 10–13)

To ensure students are appropriately challenged and made to think hard, teachers and students need to reflect carefully on where students are in the learning process before learning commences. In this sense, reflection is a carefully structured and disciplined process. It is based on an understanding of the material being learned, the process of learning and the current strengths and limitations of the individual learner in that context.

A metacognitive approach can help students navigate their learning journey. Students reflect upon their thinking, evaluating the success or otherwise of their approaches to learning as they are deployed, and then revising them if need be. It is a habit, incorporating strategies and skills.

Metacognition involves two distinct processes. Metacognitive knowledge is the knowledge the student has about the task in hand, their own cognitive abilities and the learning outcomes or goals. Metacognitive regulation involves a student controlling the cognitive processes and strategies being used as they complete a task, for example, re-reading a passage of text because the meaning was lost first time around (see Flavell, 1976 pp. 231–236). It is quite common for a learner to demonstrate metacognitive knowledge but not be competent at metacognitive regulation. Both are critical.

Swartz and Perkins (1989 pp. 179–183) defined four levels of metacognition:



Figure 2: The reflective learner

Tacit learners are unaware of how they think and learn – they simply accept whether they know something or not and will very likely have barriers (real or otherwise) in the way of their progress and development.

Aware learners know about some of the kinds of thinking they do – they can compare and apply, for example, but are not strategic in their thinking. Again, barriers to learning in the form of misconceptions are prevalent and these learners do not work hard to overcome them.

Strategic learners can organise their thinking by using problem-solving, decision-making, evidence-seeking and other kinds of cognitive strategies to aid their learning. They prove successful where the task or activity is known to them and are able to select an appropriate approach based on prior understanding and knowledge. Where strategic learners can fall down, though, is in situations and contexts that they have not come across before.

At the final level, reflective learners are not only strategic in their thinking but are able to reflect upon their thinking-in-progress, pondering their strategies and revising them as appropriate. They thrive in the unfamiliar or unknown, actively learn from failure or setbacks, and have developed a considerable degree of resilience and determination. Moving from being a tacit to a reflective learner involves 'learning how to learn'.

Learning to learn is concerned with developing the capacity to accurately reflect on one's learning and deliberately apply this understanding to learning in the future. In the words of Watkins (2010) this involves making 'learning an object of learning'. This requires a number of learning habits, strategies and processes incorporating metacognitive knowledge and regulation including:

- self-awareness of how I am learning and how effective my learning is
- identifying and overcoming barriers to learning
- questioning assumptions
- delaying gratification, sticking to a task, enjoying challenges and difficulties
- organising learning effectively
- being willing and able to ask for help, understanding when one's own resources are limited
- learning from mistakes and setbacks
- trying new strategies.

The attitude a learner has towards learning is critical. Effective learners are more likely to be self-regulated and intrinsically motivated. They approach learning in a way that emphasises understanding and retention of learning. Extrinsically motivated students are predominantly driven by rewards and recognition. Deep and strategic learning, what Watkins (2010) terms a *learning orientation*, not only helps students develop the learning skills they will need for further education, life and the world of work, it also helps them perform better in public examinations. This can be a powerful fact in persuading results-orientated parents and students about why reflective learning matters. Learning needs to be made an object of attention, reflection, conversation and evaluation in everything the school does.

For students to effectively regulate their own learning it is important that they understand their performance in relation to what constitutes excellence. They must develop concepts of standards and measure their current performance against these. Students need to understand what good performance at a task looks like and reflect on the implications for them (see Figure 3).

Figure 3: Making learning an object of learning



This is not easily achieved and too often reflective activities and processes carried out by teachers and students are superficial. Cognitively demanding tasks require a number of complex skills and sophisticated understandings, and it may be that a student is lacking some basic techniques or has not fully grasped a critical concept. They may not be aware of this and unconsciously have become skilled at disguising these in order to keep up with the class. The art and science of excellent teaching and learning is being able to accurately interrogate performance and deduce real strengths and limitations. Some of the implications for teachers are considered later in this chapter.

The following case study from a state school in the United States gives an example of a school committed to raising standards through high expectations for all based on students taking responsibility for their learning. It uses state standards and the Cambridge curriculum to help them develop a mastery of learning.

Case study 8:

Encouraging students to take on responsibility at Parkside Middle School, Virginia, USA

Our overarching goal when becoming a Cambridge International School was to be able to develop and sustain a community in our building that encourages our students to take responsibility for their own learning.

Parkside, unlike many middle schools, is not a community school. All our students come by bus to our school as none of the communities that surround our school service our school district. Therefore, our students arrive to Parkside as 6th graders from five very diverse elementary schools. Many of our students come from homes where their parents are very involved and have high expectations for their students, while others come from homes where their parents are illiterate, and depend on the school to provide their children with an adequate education. With these challenges, Parkside decided that the Cambridge International ethos provided our entire student population with high expectation for all, offered an enriched curriculum, experiencing active learning across all contents and providing students with the opportunity to develop their critical thinking skills, not only in the curriculum but also when dealing with problems in the real world.

The mission of Parkside Middle Cambridge International School, a culturally and technologically rich learning environment, is to inspire and empower all students in a student-focused environment to excel both academically and socially, and prepare them to be productive citizens and future leaders.

All students are encouraged to take responsibility supported by a pledge recited by all students, every morning. The pledge states 'I am responsible for my own learning, I am responsible to the success of the class, I will make a difference.' Many times during the school day, students are reminded of this pledge to guide them with their personal decision making. The emphasis on our students taking an active role in their own learning is the driving force at Parkside.

Our goal is to develop learners who are confident in working with information and ideas (their own and those of others), responsible for themselves, responsible to and respectful of others. We include reflection in our daily practices to encourage students to be reflective as learners, while developing their ability to learn, innovate and be equipped for new and future endeavours.

Virginia has very clear standards of learning that drive our curriculum, therefore in English, Maths and Science, we enrich our curriculum with Cambridge programmes. At Parkside, we believe that it is important that our students (and parents) truly understand the standards that they are expected to master, and that the grades they earn depict this learning. It is important that our students understand the areas where they have strengths as well as weaknesses so they can work alongside their teachers to develop next steps in the educational journey.

All student assessments focus on the development of mastery of learning. Students play an active role in the mastery process. They record their progress in data folders and through the online gradebook maintained by teachers. All grades that are entered in the gradebook are broken down by individual standards, and only summative assessments and projects are included. With that students are expected to re-learn, re-study and re-take all assessments to improve on their learning. Classroom study and homework are viewed as practice opportunities so they do not receive grades. Our vision is to structure learning experiences for our students to be able to take risks in their own learning, and not to see mistakes as failures, but as a way of practising for the goal of mastering the material.

Approaches to teaching and learning that support reflection and learning how to learn

It is important that reflection is fundamental to the day-to-day activities of all teachers, and that it forms part of their lesson planning and practice. Students need to learn to enjoy being made to think hard and actively reflect on learning as it occurs. Powerful approaches and strategies include (all appropriately supported by the teacher):

- making learning goals and assessment criteria explicit, helping students to plan strategies and develop ways of monitoring their progress towards achieving these goals
- involving students in collaborative activities in which they practise articulating their own understandings of the material and reflect on their own performance and learning process
- reciprocal teaching and learning which involves students summarising and presenting to others key ideas, findings and outcomes and/or teaching their peers specific content and skills
- instructional practice which requires students to give explanations of their own understanding of the studied material leading to discussion and questioning
- teaching students self-verbalisation. This helps students to develop a language that enables them to be self-critical evaluators of their own performance and what they are learning
- students assessing their own levels of understanding, effort and strategies on task and peer assessment where students learn to assess each other
- encouraging discussion of strategies in class so that students understand when to use certain strategies, the impact they have on their learning, and why the strategies work
- visible thinking routines. These are an effective way to promote deliberate thinking and to provide a structure to the way students go about the process of learning (see for example Harvard thinking routines at: **http://www.visiblethinkingpz.org/VisibleThinking_html_files/03_ThinkingRoutines/03a_ThinkingRoutines.html** One example is 'connect, extend and challenge':
  - **Connect:** How are the ideas and information presented connected to what you already know?
  - **Extend:** What new ideas did you get that extended or pushed your thinking in new directions?
  - **Challenge:** What is still challenging or confusing for you to get your mind around? What questions, wonderings or puzzles do you now have?

In a study of metacognition in five and six-year-olds the researcher Larkin (2000) used a coding framework to identify all the metacognitive behaviours she saw when observing both teachers and students. On pages 39 and 40 are two tables summarising the different behaviours and the language used in support of metacognition in the classroom. While based on young children, the examples illustrate styles that are relevant and adaptable for all ages (note that some of the examples have been adjusted for an international audience):

Table 4: Metacognitive talk – teachers

Teacher behaviour and language supportive of metacognition	
Explanation	**Example**
Refers to self-learning strategies	'What could you do if you've got problems?'
Questions acquisition of knowledge	'How do you know that?'
Teacher prompts regarding information provided	'We found the biggest; what else could we do?'
Teacher aids explanations	'X explained putting the biggest to smallest very well.'
Teacher questions/comments on strategies	'How are you putting them in order?'
Teacher asks for predictions of success	'Will this make it easier?'
Teacher shows expectations of planning	'How are we going to do this; what do we need to think about?'
Teacher expects checking	'Check what you are counting in or the unit of measure.'
Teacher refers to own cognitive processes	'I don't understand it either, so let's have a look together.'
Teacher refers to thinking	'Let's put on our thinking caps.'
Teacher refers to universals of cognition	'We are learning how to solve problems. We are learning to analyse a poem.'
Teacher prompts evaluation	'Was it difficult to do or was it easy?'

Table 5: Metacognitive talk – students

Student behaviour and language supportive of metacognition	
Explanation	**Example**
Shows knowledge of self in relation to cognition and/or predicts from this.	'I know what to do.' 'Oh I love hard work.'
Refers to what others may think/desire	'She doesn't know.' 'He doesn't want to be last.' 'I think they can help us.'
Refers to universals of cognition	'We've got to solve a problem.' 'I think we need to quote more examples from the poem if we're going to get more marks for "analysis".'
Questions task information and/or seeks clarification	'Something is missing.' 'Can you explain what that means? I think it is important.'
Predicts success/failure	'We'll be finished soon.'
Rating: refers to ease/difficulty of task	'I think this is easy. It won't take us long at all.'
Compares with other tasks	'This is like when we made a model.'
Evaluates: indicates knowledge about what might be useful	'We should build up the boxes.' 'That's the quickest way to do it.'
Refers to planning how to do the task	'We need to know where best to start.' 'We should talk about it together.'
Paraphrases to confirm understanding	'Did you mean...?'
Asks questions of self	'Is that right?'
Checks work	'This one's good, this one's not.'

Reflective learning and study skills

Making learning an object of learning requires learners to develop a sophisticated and accurate understanding of the learning process. Sometimes in schools this is not sufficiently recognised or supported. Students, parents and teachers should think about what learning involves and how it happens, as well as considering how the learner attributes can contribute.

One way of looking at learning is to consider learning efficiency, the amount and quality of learning that takes place over a specified period of time. Improving learning efficiency can result in more being learned, more quickly, more effectively and more deeply. This creates more time for further learning in valued areas across the formal and co-curriculum, and for students to pursue passions and interests.

One example of wasted time and effort that slows down learning efficiency is when students adopt ineffective study habits. Table 6 looks at some of these. The common factor in ineffective study is that it is passive and not targeted or specific enough. Students tend to practise what they already know and can do, and are not sufficiently challenged (the work is too easy) or they cannot access it and get demotivated (the work is too demanding). The revolution that has occurred in high-performance sport towards high-quality, targeted, specific practice based on evidence of performance is relevant to schools.

Table 6: Effective study habits

Misconception and common practice	Reality and more effective practice
In revising for examinations and tests students read the textbook and their notes over and over again trying to memorise everything. Often students are spending time reviewing what they understand already. Students easily get distracted – as revision is passive, their mind can wander with the illusion they are learning.	Students need to focus and practise specific areas of challenge identified by formative assessment and reflection. Revision is more effective when students have to answer questions and note what they can and cannot do well. This provides a clearer focus for further study. This form of revision is active as students are testing their understanding and reflecting on the outcome.
Students copy out their notes over and over and concentrate on factual recall.	Learning is best split into chunks and facts are best learned in connection with the concepts and ideas to which they relate. See the section on mind maps in Chapter 4 on innovation and creativity.
Revision is delayed until a unit test or end-of-year examination. Lessons and units are taught as discrete entities.	Revision and practice should be constant. At the start of every lesson students (supported by teachers) should be made to think of what has been recently learned. Teachers need to build bridges in students' minds between learning in different classes, and students need to practise and practise again new skills and understandings soon after they are learned so that they become deeply embedded. Once a concept is deeply learned and understood it is very hard to forget, making revision before the examination much easier.

Table 6: Effective study habits continued

Misconception and common practice	Reality and more effective practice
Students revise and work alone.	While revision can effectively be done by students alone it does not have to be a solitary activity. Revision can effectively be done as a collaborative activity with students working in pairs or groups. Students can specialise by dividing up the material, testing each other and teaching each other. Note that student reciprocal teaching has a very high effect size in Hattie's (2009) analysis of effective practice.
Once an assignment, examination or test is complete, students do not reflect on what caused their performance to be what it was.	Assignments provide powerful formative learning opportunities. Students can be encouraged to reflect on their performance using specific practices and instruments designed for this purpose. See for example Stanford University's 'exam wrappers' concept: **teachingcommons.stanford.edu/teaching-talk/exam-wrappers**

Students and teachers can be encouraged to ask a series of reflective questions that help identify the processes of learning that are taking place and link learning activities together. One simple example is in Table 7, right:

Some schools try to support study skills through providing specific, discrete classes or activities as part of a personal and social health curriculum. This can support the development of a learning orientation but will not work unless practices and habits are modelled and supported by all teachers across the curriculum. Learning is highly context specific and cannot be separated from what is being learned. Individuals will have different strengths and limitations in different subject areas, and it is important that they engage with these as they learn new material.
All teachers in the school need to support learning how to learn.

One practice that can work well is to include student self-evaluation in reporting and parent conferences. One example of this is provided in Case study 9 (on the next page), which highlights the focus of parent conferences as 'talking with students about their learning, not talking about a student's work'. The case study also emphasises the value of reflective conversations as part of every teacher's professional development and the role parents play as an active participant in a three-way conference, which exemplifies some of the points made in the following sections of this chapter.

Another tool some schools use is to require students to write learning journals or blogs, or to keep their portfolios of work regularly updated with metacognitive reflections on their learning as it progresses.

Table 7: Nine questions for students to develop metacognitive thinking (adapted from Innerdrive, 2017).

Before the task

1. Is this similar to a previous task?
2. Can I describe in my own words what success in this task will look like?
3. Where is the best place to start?

During the task

4. Am I on the right track?
5. What can I do differently if I'm not?
6. Who can I ask for help? (One strategy: see two classmates before approaching the teacher for help.)

After the task

7. What worked well?
8. What could I have done better?
9. Can I apply or connect this to other situations and learning contexts?

Case study 9:

Reflective learning at United World College South East Asia, Singapore

Reflection as a tool to support learning is widely used in schools, and this has certainly been true at United World College South East Asia (UWCSEA). But perhaps it was only when we as teachers started to use reflective conversations as a tool for our own professional development that we began to see the importance of reflective dialogue to support student learning too.

How we define reflection

Reflection can improve **self-awareness, self-management, thinking** and **wellbeing** through three phases of reflection:

Awareness phase. In the first phase we look again (as in the metaphor of a mirror) at ourselves. We do this by intentionally creating conditions that allow for heightened awareness of feelings, thoughts, events (actions, achievements, completed tasks, outcomes) or approaches (use of particular strategies, perspectives or thinking during a process). Sometimes reflection might stop here with greater mindful awareness.

Analysis phase. In the second phase we might use thinking routines (protocols, dialogue, mediative questions, prompts etc.) to help us consider causal factors, with the aim of clarifying or understanding our feelings, thinking and mindset. This might be 'thinking' in lots of domains from the cognitive to the affective (moods, feelings, attitudes). Sometimes reflection might stop here with a greater sense of causality, clarity or understanding.

Application phase. In the third phase we might think about the implications or the application of what we have learned during previous phases of reflection. We may try new thinking, new perspectives or modify existing approaches with the help of thinking routines. This might support the development of a growth mindset, enhance self-regulation and support an internal locus of control. (UWCSEA East – reflection guidance)

Example of how we use reflective dialogue with students

Three-way conferences are held twice a year and are attended by high school students, their parents and their teachers. They form one opportunity to support reflective conversations and increase student ownership of the learning and self-directedness.

- Three-way conferences are based in UWCSEA Learning Principles, including:
  - learners use timely and goal-directed feedback
  - learners have ownership of their learning
  - learners think and act upon their learning.
- Three-way conferences encourage development of elements of the UWCSEA Profile including:
  - communicator, self-aware, self-manager, resilience.
- Three-way conferences strengthen open communication about learning between students, parents and teachers. The focus is on talking with students about their learning, not talking about a student's work. It is about developing student voice and then listening to it.

It is through the use of mediative questions used in Cognitive Coaching® that students (and teachers) are encouraged to reflect on their own learning, and to become more self-directed. Mediative questions engage and transform the thinking of a student. They have three characteristics that make them powerful:

1. They are invitational, i.e. they encourage students to think about their learning in a strategic way.
2. They engage specific cognitive operations, e.g. compare, analyse, predict.
3. They are intentional, i.e. they have a deliberate purpose in their structure and use.

Case study 9: continued

Before each three-way conference, students are asked to spend time going through the first phase of reflection for each of their subjects. Parents are asked to consider the student's learning at home and questions they might ask for clarification from the student and the teacher. Teachers consider the sorts of mediative questions they might ask each student to support their analysis of what is helping or hindering their learning. During the three-way conference, students and parents are encouraged to take notes to help with the setting of goals and to support phase three of the reflective process.

The value of reflective conversations to support student learning may best be summarised by one parent's response: 'Feedback to my child was very motivational. I liked that they did not focus so much on grades but on progress, attitudes and strengths. This is what we teach current leaders – how to motivate people!'

It is our intention to use reflective dialogue to help student and teacher learners think reflectively about their growth and development, to be able to plan future learning and to have a sense of autonomy. The open communication and support of the process has also been helped in building trust within the UWCSEA community.

Examples of questions	Phases of reflection
What might be the skills you contributed most? What did you need to consider when planning? What did you have control over in this situation? What aspects of this unit might have challenged you most?	Awareness
What options did you have when planning? Why was this important to you? How might you have responded if…? What restraints did you have and how did you overcome them?	Analysis
How might your actions have shaped the outcome? How might you consider planning this service differently next time? How might your approach influence other situations or people? Which of your skills did this call for and how might you use them in other situations?	Application

The reflective teacher

For students to be reflective it is essential that teachers model reflective processes themselves and create the right conditions in the classroom through the way in which they plan and deliver their lessons. Teachers need to nurture practices that support metacognitive knowledge and regulation in students. We considered some strategies for this in the previous section. They need to apply the same principles to their own professional practice and become reflective practitioners.

Reflective practice can be described as the process of learning through and from experience, towards gaining new insights of self and practice (Schön, 1983). Schön makes reference to two main processes of reflection in professional practice – reflection-in-action (self-monitoring) and reflection-on-action (an aspect of self-evaluation). He emphasised the former more because he argued that in many professions, there is an absence of a secure body of knowledge: 'Real-world problems don't come well formed. They tend to present themselves, on the contrary, as messy, indeterminate, problematic situations' (Schön, 1992 pp. 49–63).

This is best illustrated in a classroom environment. Students come to the classroom with preconceived ideas about how the world works that teachers do not always immediately recognise or understand. Teachers need to be able respond quickly to what they learn about student understanding as the class progresses. In such an uncertain, 'messy and indeterminate' context, reflection-in-action is critical to addressing this and making sure that what happens next brings student learning back on track. This involves asking questions of ourselves and exploring the problem with the students to get to the bottom of it. Effective teaching, therefore, involves probing and questioning, reflecting on the outcomes of this process and adapting practice accordingly.

Kolb's (1984) experiential learning cycle was introduced in Chapter 1. Another influential model of reflection is Gibbs's reflective cycle (1988, p. 49). It builds on Kolb's work on experiential learning, and proposes that theory and practice enrich and inform each other in a never-ending cycle. Gibbs describes seven stages of a 'structured debriefing' in relation to the learning experience:

- Description – illustration of the teaching/learning experience, where no judgments are made and conclusions are not drawn.
- Feelings/reactions – describing the reactions and feelings that emerged as part of the experience.
- Evaluation – making value judgements about the experience.
- Analysis – making sense of the situation, bringing the ideas from outside the experience, comparison of different people's experience.
- Conclusions (general) – what can be concluded from the experience and the analysis undertaken.
- Conclusions (specific) – what can be concluded about one's own specific, unique and personal situation and way of thinking.
- Action plan – thinking about how to differently approach the same type of situation in the future; what steps can be taken on the basis of what was learned?

The model is a cycle: learning and actions provide new forms of experience that become the subject of reflection. Mezirow and Associates (2000) stress that professional learning happens because the teacher takes charge of his or her critical reflection and explicitly plans and carries out steps to learn from it, transforming his or her behaviour. This level of personal responsibility for learning is crucial during initial teacher education, but should continue throughout a professional career if the teacher is to be successful.

Dr Ron Ritchhart has an excellent bank of resources for teachers to develop themselves as reflective practitioners on his blog: **www.ronritchhart.com/COT_Resources.html**. He has also developed a tool for patterns of thinking in the classroom (available at **tinyurl.com/patternsofthinkingtool**), which helps structure a post hoc view of recent teaching and learning. A checklist called Visible Learning Inside (**tinyurl.com/visiblelearninginside**), developed by Professor John Hattie, provides an evaluation and reflection tool on teaching efficacy in the school. Here teachers are asked to reflect on what their students are telling them about the impact of their classroom practice. It is a powerful way of gaining feedback on teaching and learning in the school, as well as increasing student voice.

Table 8 illustrates how Cambridge Professional Development Qualifications are based around developing the teacher as a reflective practitioner.

Table 8: Developing reflective practice through Cambridge Professional Development Qualifications

Cambridge Professional Development Qualifications in teaching and learning	
Cambridge Professional Development Qualifications contain a number of guiding questions to help develop teachers as reflective practitioners. These include: **Module 1** Unit 1: • an identification and explanation of the key features teachers think make an effective lesson • an evaluation of the impact their new learning and experiences will have on their practice. Unit 2: • an analysis of the effectiveness of the lesson, highlighting what aspects went well and explaining why they think these went well • an evaluation of their existing teaching practice, identifying what aspects need further development and explaining how they intend to change and develop those aspects in their future practice. Unit 3: • an explanation of how they used formative assessment to monitor the learners' learning and progress and evaluate how effective it was • an evaluation of the new knowledge and skills they have developed throughout the programme and an explanation of how this will help to develop their future professional practice so that their learners will learn more effectively. **Module 2** Based on the two taught sequential lessons and teacher experiences during this module, reflection will consider: • an analysis of the approaches to teaching and learning they used in the two observed lessons – this should identify what engaged and motivated their learners to learn, and explain the reasons why • an evaluation of the two lessons, highlighting what worked well and why, and what did not work well and why – it should also explain what developments they intend to make in the future	**Module 2 continued** • an evaluation of the learning activity and formative assessment activity they designed and used that were 'new' to their practice • an evaluation of their teaching practice and the learners' learning, using feedback from a variety of sources to identify existing strengths and those aspects that need further development. **Module 3** Based on their Diploma experiences and teaching the sequence of learning (programme plan) designed for Module 2, reflection will consider: • an evaluation of the current programme plan indicating what realistic and feasible changes they would like to make to develop future learning programmes • an analysis of the significant changes in their planning, teaching and assessment practice – this also explains why the changes have been adopted and the impact these have had on their learners' learning • an analysis of the strategies used to promote inclusive learning and the impact this had on the learners and their learning • an analysis of the activities that encouraged the learners to be curious and creative in their learning and how effective they were in motivating them to learn • an evaluation of how learning was inclusive so all the learners' learning was supported, challenged and extended • an analysis of how effectively formative assessments were used to support and monitor the learners' learning • a justification of why an understanding of the concept of learning and how people learn helps to develop their professional practice • an evaluation of the knowledge and skills they have developed during the Diploma programme – this should also explain what they intend to develop in their future professional practice to help their learners learn more effectively.

Reflective schools and school effectiveness

Schools need to be reflective organisations to set up the conditions needed for learners and teachers to be reflective. Effective schools are those that successfully progress the learning and growth of all of their students, regardless of background, beyond their normal expected developmental rate of growth. The two most important in-school variables to impact on student outcomes are the quality of teaching and school leadership.

Where should schools concentrate their efforts in terms of analysis and reflection? While there is no single key determinant of an effective school, research suggests that there are many things that schools can do to become more effective and maximise the chances of success for every child. These actions emerge from what are called the correlates (or indicators) of effective schools. These include: high academic standards and expectations; a school climate which focuses on achievement and learning; instructional leadership; high-performing teachers; students who are confident as learners and perceive themselves as in control of their learning; parents with high aspirations and expectations; resources that are fit for purpose; and excellent school governance including sound financial management.

Setting high standards for individual student achievement, measuring and tracking performance against these standards, and then intervening as soon as any student begins to fall behind these standards are central to effective schools. Schools that collect, analyse and reflect upon student achievement data, then design teaching strategies to build student outcomes, are likely to be effective (Barber & Mourshed, 2007).

The Cambridge Standards for School Self-Evaluation (see Table 9) are based on these indicators of effective schools and provide a mechanism by which schools can reflect upon them formally.

More detailed consideration of school effectiveness is provided in the *Developing your School with Cambridge guide*. This is available at: **www.cambridgeinternational.org/teaching-and-learning/developing-your-school-with-cambridge/**

Professional learning and development

A large body of research confirms that, of all the in-school variables that can be influenced, classroom teaching has the largest impact on student outcomes (Hallinger, Heck & Murphy, 2014; Hanushek & Rivkin, 2012; Hattie, 2009). It is what teachers know and do – their knowledge, pedagogical practices and relationships with students – that makes the difference in improving student learning outcomes. High-quality teachers are characterised by having a deep knowledge of their subject discipline and how concepts are taught, a commitment to ongoing professional development, high expectations for all students and the creation of a positive student–teacher relationship. According to Hattie (2003):

'Teachers account for about 30% of the variance [in student performance]… Students who are taught by expert teachers exhibit an understanding of the concepts targeted in instruction that is more integrated, more coherent, and at a higher level of abstraction than the understanding achieved by other students.'

Creating strong, professional learning communities among teachers is a powerful tool for improving student outcomes. Networks of professionals, planning and collaborating together around student learning, are known to have a greater collective impact than teachers working in isolation. The work of Bolam et al (2005) and Louis & Marks (1998) found that student achievement was significantly higher in schools with strong professional learning communities. It is important, therefore, that the focus shifts from helping individuals be more effective in their isolated classrooms to creating a collaborative culture of interdependence and shared responsibility (Dufour & Marzano, 2011; Fullan, Rincon-Gallardo & Hargreaves, 2015) and building, what Hattie (2015) calls 'collaborative expertise'.

School leadership and governance

The school principal, together with other senior administrators, has a critical role in creating the conditions necessary to support the learner attributes and the practices associated with effective schools. They need to provide a clear vision and sense of direction for the school, promote evidence-based teaching practices, prioritise professional learning, create a culture of high academic expectations and ensure that student learning is central to school improvement strategies. It is interesting to note that school leadership has a significant influence on student outcomes, second only to classroom teaching (see for example: Leithwood et al, 2004; Louis et al, 2010; Qian & Walker, 2011; Robinson, Lloyd & Rowe, 2008). Leadership is also the single most important determinant of attracting and retaining high-quality teachers (Darling-Hammond, 2013).

The importance of the principal as an instructional leader is well supported by research (see for example Robinson, 2008). Robinson concludes that the more school principals focus all their efforts and their own learning on improving teaching and learning, the greater their influence on student outcomes. More recently, Hattie (2015, p. 24) has argued that leaders need to build teacher instructional skills through 'collaborative expertise'. Fullan et al (2015) build on the theme of capacity building by arguing that the primary strategy for leaders is to build effective collaborative cultures.

Within the school the relationship between leadership and school improvement and school effectiveness is clear. What is also increasingly clear is the critical role that strong governance plays in effecting ongoing improvement. The Confederation of British Industry argues that 'evidence shows that more effective governance and higher quality leadership and management together have a positive effect on the quality of provision and on pupil achievement'(Confederation of British Industry, 2013 p. 8). Its research confirms that schools and principals need robust support structures to help drive improvements. Leaders benefit from a clear framework in which to act, so that they can carry out their roles effectively and be properly held to account.

The Cambridge Standards for School Self-Evaluation

The *Developing your School with Cambridge guide* Chapter 2 (available at **www.cambridgeinternational.org/images/271307-creating-the-school-development-plan.pdf**) considers the registration standards expected to become a Cambridge authorised school, and development planning post-registration. The Cambridge Standards for School Self-Evaluation (see Table 9 and Table 10) are designed to help schools reflect on their progress post-registration with Cambridge, providing more support for schools that want this service. Schools can complete a questionnaire that provides a carefully structured opportunity to engage with their three main stakeholders – students, staff and parents. It also allows them to collect data which will help them reflect on their performance, design improvement strategies and track progress over time in the key areas of performance as defined by the literature relating to effective schools.

The focus for school improvement defined in these standards is unambiguously a student learning culture and everything that contributes to that culture, such as leadership, teacher quality, governance and parental support and involvement.

While the evaluation surveys provide powerful feedback, schools are encouraged to collect other data sets (for example, academic results and annual improvement plans) to complement the data collected through these surveys. These data may also suggest that the school needs to investigate further particular areas for development, and this can be done at the school level through a range of analysis and data strategies.

Table 9: Cambridge Standards for School Self-Evaluation

Cambridge Standards for School Self-Evaluation	
Domain 1 – The school's mission and values 1. The school has a clear mission and vision statement underpinned by its educational values. 2. The culture of the school focuses strongly on student growth and the realisation of their potential in all areas of development. 3. The actions of the school leaders and teaching staff are consistent with the school's values and philosophy. 4. The school promotes intercultural understanding, celebrates diversity and actively develops in students a deep appreciation of other people's views and perspectives.	3. Teachers and teaching are of an excellent quality and are enhanced by systematic, high-quality professional development opportunities. 4. The teaching and learning programme caters effectively for individual student needs. 5. Formative assessment (assessment for learning) is embedded into classroom practice throughout the school. 6. Students at the school are actively engaged in their studies, think reflectively, and exhibit a love of learning. 7. Students demonstrate behaviours and attitudes that are consistent with the school's mission and values. 8. Student transitions from year to year are managed effectively and seamlessly.
Domain 2 – School management and leadership 1. The school principal and leadership team have the appropriate knowledge, skills and experience to lead the school effectively. 2. The school leadership team promotes high-quality educational programmes and activities for all students and tracks individual growth. 3. The school culture is inclusive and supports all students and staff in their learning and development. 4. All members of staff are supported through a performance and development programme which focuses on continuous improvement. 5. The leadership team has a clear process for evaluating programmes and developing school-wide improvement strategies. 6. Teachers and staff have a clear sense of their shared purpose and mission. 7. Students and staff feel valued and are treated with dignity and sensitivity.	**Domain 4 – The physical environment of the school** 1. The school's resources are sufficient to support a high-quality teaching and learning programme. 2. The school is a safe and secure place in which students can learn. 3. Students have access to up-to-date technology, tools and resources to enable quality learning. 4. The school uses resources sustainably and in turn encourages students to take responsibility for the local and wider environment in which they live.
Domain 3 – Quality of teaching and learning 1. The school's written curriculum is fully articulated and made available to the school community. 2. The school is committed to an ongoing and rigorous review of its academic programme to ensure quality outcomes for all.	**Domain 5 – School community engagement** 1. School parents are actively engaged in the life of the school and have regular opportunities to contribute their knowledge and expertise. 2. Parents receive regular reports about the progress of their child/ren in academic domains as well as other areas of development. 3. Parents are perceived as co-partners in their child/ren's learning. 4. The school engages with and mobilises relevant individuals and groups within the community and welcomes them as co-contributors to the life of the school.

Table 10: Some exemplar questions from the Cambridge Standards for School Self-Evaluation

Examples of questions asked against Cambridge Standards for School Self-Evaluation:
Formative assessment (assessment for learning) is embedded into classroom practice throughout the school. (Standard 5)

To what extent do students agree with the following?

- My teachers provide me with feedback about my learning on a regular basis.
- My teachers help me to understand mistakes I have made.
- My teachers regularly mark my work and return it to me promptly.
- My teachers provide support when I am having difficulties.
- I am encouraged to give feedback to teachers on my learning.
- In my assignments, I know what I have to do to be successful.

To what extent do teachers agree with the following?

- In my classes, I use a broad range of assessment tasks.
- Students have opportunities to provide written feedback about their learning in their classes.
- Students have opportunities to improve their work after they receive feedback.
- It is important to show students what success looks like in their learning.
- I always give students written feedback about their work.
- I use a range of formative assessment strategies to plan the next steps in my students' learning.
- I know what the key concepts are for my curriculum area and pay particular attention to them in my classroom practice.

To what extent do parents and carers agree with the following?

- Teachers provide feedback through written comments on assignments.
- Our children receive individual attention with any difficulties they may encounter.
- Our children know where they are in their learning and what they have to do next to improve.

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Resources

A number of resources are available in the Cambridge 'Teaching and learning' area of the Cambridge International website at **www.cambridgeinternational.org/learning**:

- Getting Started with Reflective Practice
- Getting Started with Metacognition
- Education Brief on metacognition
- Active Learning

Building Learning Power presentation by Professor Guy Claxton at the Cambridge Schools Conference, Homerton College, 2014. Guy Claxton is a widely respected and experienced neuro-scientist, author and educationalist with a particular passion for developing students' capacity for life-long learning:

Podcast: **https://soundcloud.com/cie-education/the-building-learning-power-approach-to-making-successful-independent-lifelong-learners**

Presentation slides: **http://www.cambridgeinternational.org/images/177923-guy-claxton.pdf**

Guy Claxton's website with resources: **https://www.buildinglearningpower.com**

Chris Watkins' website contains a very large number of excellent, free resources: **chriswatkins.net**

Harvard University Project Zero: A number of resources for teachers to develop themselves as reflective practitioners can be found on Dr Ron Ritchhart's blog: **http://www.ronritchhart.com/COT_Resources.html**. As a researcher at Harvard Graduate School of Education's Project Zero, Ritchhart has developed a patterns of thinking in the classroom reflection tool, which helps structure a post hoc view of recent teaching and learning: **tinyurl.com/patternsofthinkingtool**

See also Harvard University Visible Thinking: **http://www.visiblethinkingpz.org/VisibleThinking_html_files/03_ThinkingRoutines/03d_UnderstandingRoutines/ConnectExtendChallenge/ConnectExtend_Routine.html** [Accessed 10 April 2017].

Stanford University's Teaching Commons website: **https://teachingcommons.stanford.edu/teaching-talk/exam-wrappers**

John Hattie: Visible Learning Inside: A checklist, developed by Professor John Hattie of Melbourne University. **Visible Learning Inside** is an evaluation and reflection tool, completed by students, on teaching efficacy in the school. Here teachers are asked to reflect on what their students are telling them about the impact of their classroom practice. It is a powerful way of gaining feedback on teaching and learning in the school, as well as increasing student voice. **The Education Endowment Fund (Sutton Trust) toolkit: https://educationendowmentfoundation.org.uk/resources/teaching-learning-toolkit/meta-cognition-and-self-regulation**

Listen to **Prof Dylan Wiliam** talk about the importance of young people being able to reflect on their learning and how teachers can utilise these insights: **https://www.youtube.com/watch?v=bojaoVYrBmE**

Chapter 4: Innovation and creativity

> “Electricity is not only present in a magnificent thunderstorm and dazzling lightning, but also in a lamp; so also, creativity exists not only where it creates great historical works, but also everywhere human imagination combines, changes, and creates anything new.”

Lev Vygotsky, 1930/1967, cited in Smolucha, 1992, p. 54

Overview

Innovation and creativity are fundamental to all academic disciplines and educational activities, not just the arts. The creative process, as with reflection considered in the previous chapter, is a critical component of making sense of learning experiences. A number of approaches to teaching and learning are considered in this chapter that help to nurture creativity and innovation. See Figure 6 for a visual overview (page 58).

What are innovation and creativity?

Innovation can be broadly thought of as new ideas, new ways of looking at things, new methods or products that have value. Innovation contains the idea of output, of actually producing or doing something differently, making something happen or implementing something new. Innovation almost always involves hard work; persistence and perseverance are necessary as many good ideas never get followed through and developed.

Creativity is an active process necessarily involved in innovation. It is a learning habit that requires skill as well as specific understanding of the contexts in which creativity is being applied. The creative process is at the heart of innovation and often the words are used interchangeably.

According to Kampylis and Berki (2014, p. 6):

‘Creative thinking is defined as the thinking that enables students to apply their imagination to generating ideas, questions and hypotheses, experimenting with alternatives and to evaluating their own and their peers’ ideas, final products and processes.’

Kaufman and Beghetto (2009, p. 6) developed four categories of creativity which help to reveal the nuances between different levels and types of creativity. See Table 11 (page 54).

Table 11: Four categories of creativity

Big-C creativity (sometimes called 'high' creativity)	Big-C creativity is reserved to describe the work of an elite few who have transformed their discipline with their inventions. Their work has been generally accepted as being innovative and ground-breaking, even if it was considered controversial when it was first created. Some examples are scientific works such as Einstein's theory of relativity and Darwin's theory of evolution, and works of art such as Picasso's Guernica, Jane Austen's novel Emma or Ludwig van Beethoven's Symphony No. 9 in D Minor. Big-C creativity is out of reach of most of us, and big-C creators themselves are often as extraordinary as their creations.
Pro-c creativity	This type of creativity has involved time (usually at least 10 years) and effort to develop. A musician who showed promise as a child, has trained to degree level and now makes a living teaching and playing classical music could be classified as pro-c. A physicist working at a university who teaches and undertakes academic research could also be classified as pro-c.
Little-c creativity	Little-c creativity is about 'acting with flexibility, intelligence and novelty in the everyday' (Craft, 2005, p. 43). This results in creating something new that has 'originality and meaningfulness' (Richards, 2007, p. 5). This everyday kind of creativity can be found in the kind of person who can resolve a complex problem at work, is a keen gardener with an eye for design, or takes creative photographs and exhibits them on a photo-sharing website. School-age learners may work at little-c level if they engage in purposeful practice in their discipline. Little-c creativity involves practice and may be developed over a long period of time. The internet has provided the infrastructure for little-c creativity to thrive. Websites such as YouTube, Instagram and Etsy enable creative people to share their expertise and work.
Mini-c creativity	Mini-c is defined as the 'novel and personally meaningful interpretation of experiences, actions, and events' (Beghetto & Kaufman, 2007, p. 73). This is the kind of creativity that can be nurtured by teachers and parents. 'Mini-c happens when a person demonstrates "flexibility, intelligence and novelty" in their thinking' (Craft, 2005, p. 19). It is usually applied, but not necessarily limited, to children's creativity. Mini-c creativity may not be visible to outsiders and may consist purely of ideas and connections that the learner creates. As Vygotsky (1967, p. 7) explains: 'Any human act that gives rise to something new is referred to as a creative act, regardless of whether what is constructed is a physical object or some mental or emotional construct that lives within the person who created it and is known only to him.' Piaget suggested that 'to understand is to invent' (1976, cited by Richards, 2007, p. 95) meaning that a learner 'invents' an understanding of new material for themselves. Mini-c creativity could describe a learner's achievement in finding several different ways of approaching a maths problem. It could also involve making a new connection between their existing knowledge and a new piece of information which helps them to understand the subject more fully.

The boundaries between these categories can be blurred and they are not age specific. A person could fit into multiple categories in different areas of their life. For example, a chef who could produce dishes at a pro-C level while at work might work at a little-c level when attending a watercolour painting class.

The two categories most relevant to schools are little-c and mini-c creativity. They highlight the fact that being creative and innovative is not so much about revolutionary ideas or new inventions that change the world. It is about individual growth achieved through small insights. Creativity and innovation are fundamental to all disciplines and an essential part of the learning process, forming an important dimension of learning how to learn, which we considered in Chapter 3. They are also fundamental to teachers improving their professional practice and to school development.

Being innovative and creative is dependent on the other attributes. Being creative requires reflection, encourages engagement and develops confidence and responsibility. The ability and inclination to be creative is essential to living a fulfilled and successful life, and it is valued in higher education and the workplace. There are many other benefits of maximising one's own creative potential such as physical and psychological health improvements, improved resilience in the face of difficulties and even lower levels of aggression (Richards, 2007, p.9).

Craft (2005, p.15) points out that our understanding of innovation and creativity have progressed and broadened over time. In the early 20th century creativity was considered to be an innate, elusive quality that individuals were born with. Initially creativity was most closely associated with the arts but grew to include science, technology and other disciplines. In the 21st century creativity is increasingly viewed as a distributed and collaborative process of communal sense making and problem solving.

As with all the learner attributes, cultural perspectives are also very important when considering creativity. Confucian heritage cultures, for example, tend to see creativity more as a collective exercise. They place responsibility for creativity on the social group rather than the individual. Individuals, therefore, are not encouraged to stand out from the class in the same way or to the same extent as in Western cultures. This does not mean that creativity is in any way less valued. As with all the learner attributes, ideas presented in this chapter need to be interpreted and implemented in a culturally sensitive way.

Creativity, innovation and learning

As discussed in Chapter 1, learning involves challenging, refining and improving understanding by being made to think hard. Sometimes, to understand new concepts and broaden perspectives, our approaches to thinking need to be creative, imaginative and lateral (incorporating new ways of looking at things), as well as linear (using existing patterns of thought).

One characteristic of the creative process that makes it particularly powerful is that it requires not only knowledge and understanding of the domain being investigated, but also a willingness to question and not be constrained by existing knowledge. Learners should understand how they can question or challenge established knowledge to help them to formulate their own understanding, and imagination can play an important role:

'One cannot think creatively unless one has the knowledge with which to think creatively. Creativity represents a balance between knowledge and freeing oneself of that knowledge' (Johnson-Laird, 1988, p.207, cited by Sternberg, 2012, p.4).

For creative thinking to deepen and extend learning, rather than be an enjoyable but superficial activity, it must be grounded in understanding of the content being investigated. It is vital that learners have sufficient understanding of the material with which they are being asked to be creative. Creative practice needs to complement diligent and deliberate practice that develops foundational skills – not be a substitute for it.

A revised version of Bloom's original 1956 taxonomy by Krathwohl (2002, p.212–218; see Figure 4) includes creativity in the taxonomy and places creativity above evaluation as a higher order thinking skill. An alternative, and probably more accurate, representation would be to include creativity as a process involved in skills at all levels represented in the taxonomy, and increasingly so with higher order skills. It might be thought that remembering factual information does not involve creative processes. In fact, as the section later in this chapter on mind maps reveals, creative approaches can be very helpful in remembering information. The processes used by champions at the World Memory Championships are highly creative as they use the mind's capacity to recognise and remember chunks or patterns that have meaning to the individual much more effectively than isolated facts.

Creative learning activities, like any other, need to respect Vygotsky's zone of proximal development with appropriate scaffolding provided by the teacher.

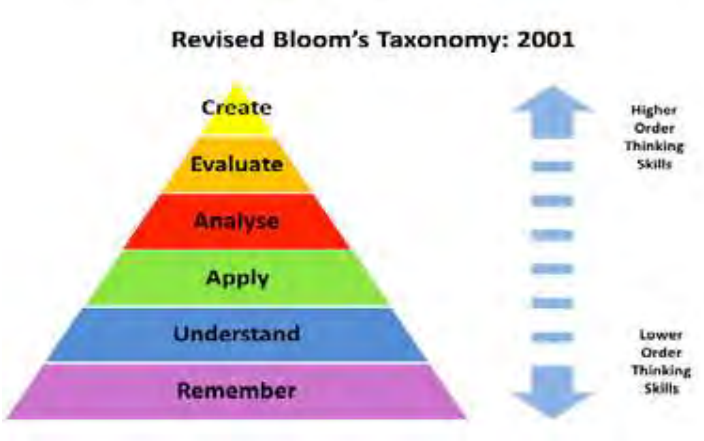


Figure 4: A revised version of Bloom's taxonomy

This is an area in which cultural sensitivity may be particularly important. If students are not used to being asked to demonstrate creative habits and skills they need to be guided. How the creative activity links to broader learning objectives needs to be clearly understood by teachers and students.

Having a creative habit, the disposition to behave creatively is critical. Csikszentmihalyi (2002, p.99) emphasises the importance of having a playful attitude while remaining disciplined. Whenever possible, play should be used to extend the range of opportunities to think. There are several character traits and learning habits that affect a learner's personal disposition, motivation and confidence to be creative. For example:

- resilience: an ability to tolerate uncertainty and persevere at a task to overcome obstacles
- not being afraid to make and learn from mistakes
- an ability to suspend judgement while generating ideas
- willingness to take sensible risks or go out of their comfort zone in their work.

A creative learner needs to be able to develop and apply a set of skills that they can use in the creative process. These include being able to:

- clarify, analyse and re-define the problem or question to uncover new ways of looking at it
- ask thoughtful questions
- notice connections between seemingly unrelated subject matter
- challenge established wisdom by asking: how would I improve this?
- recognise alternative possibilities
- look at things from different perspectives.

Creative processes usually require self-regulation, and the ideas relating to reflection and metacognition considered in Chapter 3 apply. These include learners:

- being aware of their own skills, both strengths and limitations
- thinking of a range of different strategies or approaches to use in response to a problem or question
- planning which approach to use
- monitoring their work, and being flexible enough to change to a different approach if necessary
- critically evaluating their work at appropriate points

Creating a culture of creativity in schools and classrooms

We are all born with a creative instinct and all people have creative potential. Young children naturally engage in play – a state when the imagination is used to 'try out' situations and possibilities. A cardboard box becomes a car, grass becomes food, a toy comes alive. As children mature and move through their school career, creativity can be stifled as an unintended consequence of other pressures. Students can become fearful of making mistakes if they only receive recognition for giving an answer

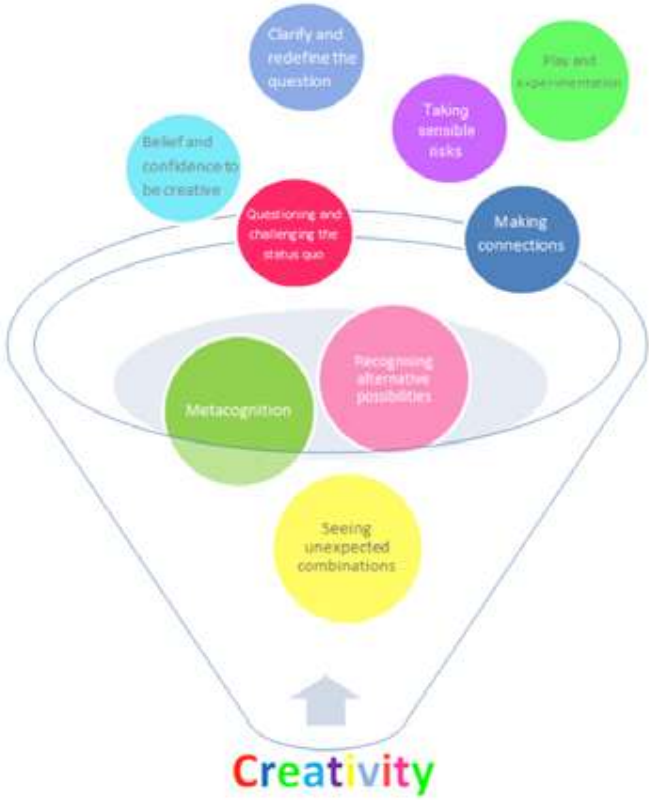
the teacher is looking for rather than valid original thinking and ideas. A study on creativity and innovation in education in European member states (Craft, 2005, p.21) found that teachers preferred their learners to be 'conforming' or 'considerate' to 'risk taking' and 'playful' (Ferrari, Cachia & Punie, 2009, p.21). A culture of 'one right answer' stops learners from being willing to make mistakes. They quickly learn to guess what answer the teacher has in their heads. As von Oech (1998, p.14) points out, 'many of us have been taught that the best ideas are in someone else's head'.

Like any habit, creativity can be encouraged or discouraged. Having a learning rather than a performance orientation, considered in Chapter 3, helps to create an environment where creativity is encouraged. Schools that are successful at stimulating creative learning:

- value and celebrate learners' creative and innovative contributions
- do not overcrowd the curriculum. They focus on depth as well as breadth. They manage time effectively, providing opportunities for pupils to explore, concentrate for extended periods of time, reflect, discuss and review. Students are expected to reflect deeply on the material that they are learning and to make connections between subjects and topics
- encourage a broad and balanced curriculum so that students experience a range of subjects and activities, including the arts
- encourage students not studying the arts as qualifications to pursue creative activities in the co-curricular programme
- develop codes of behaviour and classroom procedures that value and promote creativity
- encourage sensible risk taking, for example, teachers trying something new in their lessons.

The creative process requires time and collaboration, so creating time for creative thinking activities is important. Using a flipped classroom approach for example, where learners prepare content and do written exercises preparing for lessons in advance at home, allows teachers to plan for higher-level creative thinking activities during class time. Another approach that helps students to make connections across topic areas and understand the discipline as a whole is spaced delivery of content in lessons. This involves teachers revisiting related subject matter over a long time rather than just teaching each topic as a separate entity.

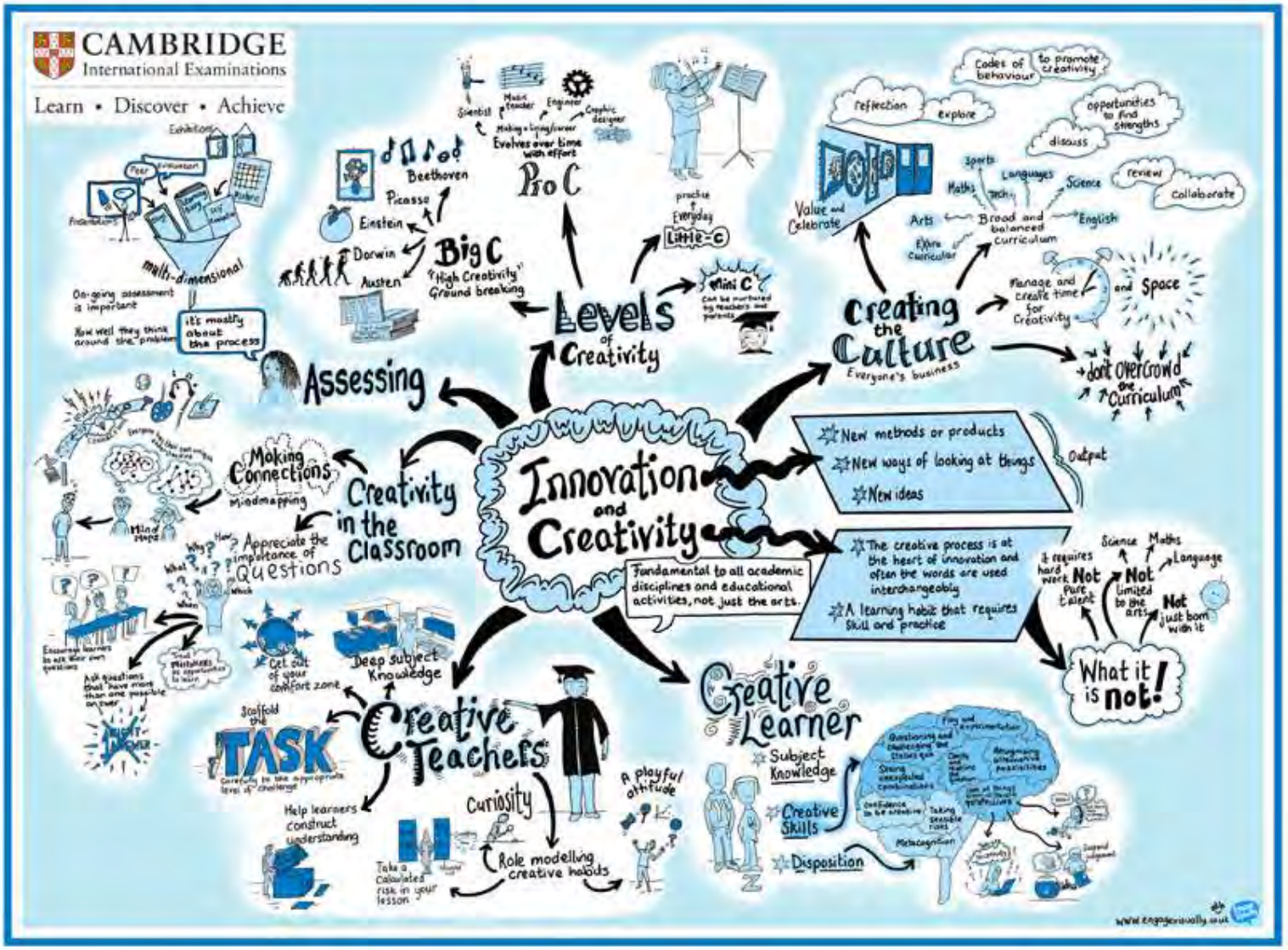
Figure 5: A creativity orientation



Creating a climate in the school by providing an environment that supports innovation can be very powerful, as Case study 10 shows:

Figure 6: Visual overview of innovation and creativity

Figure 6: Visual overview of innovation and creativity (Hover your mouse over the image to enlarge)



Case study 10:

St. Andrew's Scots School, Buenos Aires, Argentina – The Learnerspace: a new pedagogy by design

Watch the video at
https://vimeo.com/228213052

Makerspaces have become ubiquitous in schools all over the world to encourage students to apply creativity and critical thinking through design. A similar approach to learning, transforming a traditional environment into a Learnerspace can also be a great catalyst for moving pedagogy towards a learner-centred model.

Of all the many spaces in school, the school library lends itself to becoming an emblem for a new learning paradigm. In that context, we set out to embody the principles of 21st century learning through a transformation that was as profound as it was bold, and that went far beyond architectural modifications.

The first dimension of change entailed making true on the principle that learning is continuous, and transcends the physical and chronological boundaries of the classroom. By de-centralising books from the library and sending them out to school corridors and departments, we sent out the message that learning is not restricted in space and time. By allowing students to freely check out books without restrictions or controls, throughout the school, we explicitly stated that learning is a transcendent value that knows no limits or constraints.

In moving from a library to Learnerspace, the most important element of change was making sure that the redesign of the space was conducive to joyful learning. Three distinct spaces were created: a large, flexible workspace with furniture that could be rearranged freely to suit multiple configurations; a cave-like, forest-themed silent room; and a collaborative room with two projectors and floor-to-ceiling walls that students can write on. All throughout the Learnerspace, blackened walls invited students to express themselves using chalk.

Student reactions surpassed our best expectations. From being a space that students mostly used to seek refuge from cold weather, the library almost immediately became the centre of gravity of the school. Students naturally tended to occupy and make spaces come alive in ways that were hitherto unforeseen. Teachers started delivering their lessons at the Learnerspace, often sharing space with colleagues, and increasingly applying differentiation of teaching to the needs of individual learners.

And then the true joy of the learning process gradually emerged. Midday philosophy talks, quiz show-type contests, educational board games, and even a chessboard with a clock for blitz games also became manifestations that learning could be an enjoyable process.

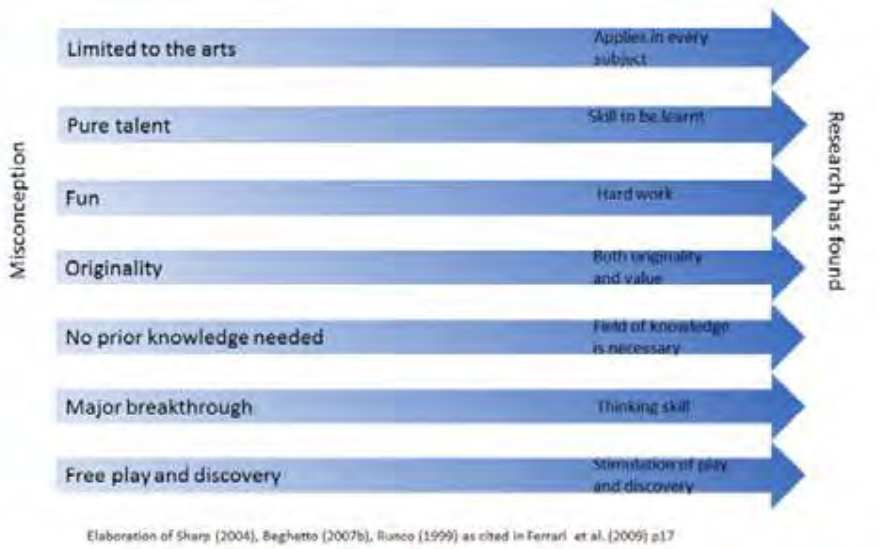
The Learnerspace embodies most of the desired learner attributes: students discuss their learning and naturally engage in metacognitive reflections, propitiated by the collaborative environment and the literal writing on the walls; they become less teacher dependent; exercise their creativity by expressing themselves actively within the space; work on the development of creative projects; take possession of the space in meetings related to their leadership roles; and create new extracurricular projects.

Many of the community forums and discussions also take place in the agora-like open space, with an openness that inspires the discussions and projects that emerge from such gatherings. The importance of the physical learning environment is often underestimated in how it can truly foster a new learning modality consistent with the modern information-rich world. Sometimes schools are daunted by the magnitude of the change required, but our Learnerspace has joyfully demonstrated that a few changes in the layout can have a substantial and inspiring effect.

Common misconceptions about creativity

Runco (1999, cited in Ferrari, Cachia & Punie, 2009, p.16) explains that people sometimes hold tacit beliefs or theories about the nature of creativity which can have detrimental effects on attempts to nurture creativity in an educational context. These theories are different from what research suggests is in fact the case. For example, many people believe that creativity is a natural talent which cannot be taught, whereas studies have shown that learners can improve their creative thinking skills with the right type of input.

Figure 7: Common misconceptions about creativity



Elaboration of Sharp (2004), Beghetto (2007b), Runco (1999) as cited in Ferrari et al. (2009) p17

Creative teachers: How can teachers help learners to develop their creative habits and skills?

'Cambridge teachers are creative, experimenting with new ideas and pursuing an enquiring approach in their teaching. They are open to new challenges, being resourceful, imaginative, and flexible. They are always ready to learn and apply new skills and techniques.'

Chapter 4 of the *Developing your School with Cambridge guide* considers the attributes of effective teachers (available at **www.cambridgeinternational.org/teaching-and-learning/**). It highlights that effective teachers have a deep knowledge of their subject as well as an understanding of how students think about subject content at different developmental stages (pedagogical knowledge). They are able to make thinking visible, helping learners to recognise misconceptions and manage their own learning. Because the creative process is fundamental to student learning, nurturing creativity is also an aspect of good teaching in all subjects.

Fostering a creative climate in the school, supportive of creative teacher professionalism, is another theme considered in the Developing your School with Cambridge guide. It is very hard for a teacher to be creative if they are following a prescribed curriculum and given little or no room for their own creative input into their teaching practice. Syllabuses, textbooks and teacher support material are extremely important in helping to structure and support learning but they also need to allow for the teacher's professional creativity. Teachers can support creativity and innovation by:

1. **Role modelling creative habits**
   Nothing is more important than the teacher exemplifying the habits, behaviours and thinking they want students to demonstrate. They need to exemplify creative traits such as curiosity and the development of creative skills (see thinking routines later in this chapter).
2. **Appreciating the critical importance of questions, both their own and those asked by students**
   Considered later in this chapter.
3. **Treating mistakes as learning opportunities and encouraging learners to take sensible risks in the classroom**
   Encouraging learners to take 'sensible risks' in their work is important for building up their creative confidence. It is important that this takes place in a supportive environment, and that the teacher and learner have discussed what boundaries are acceptable in their context. It is also important to set some ground rules in collaboration with learners.

4. **Giving learners sufficient time to complete their work**
   Sometimes ideas need time to develop before becoming valuable. Giving learners the scope to come up with their own ideas can be challenging for both teachers and learners. Learners will need time to think and work independently of the teacher. Delay judgement of learners' ideas until they have had time to work them out properly.
5. **Scaffolding tasks carefully to provide the appropriate level of challenge**
   Ideally, a teacher should try to design tasks that help the learner to cross over into this area by 'scaffolding', or supporting them at first, and then withdrawing support so that the learner can increasingly achieve the task on their own.

Even a small change in teaching approach can bring about a change in a learner's creative disposition. If learners start to see that there is not always 'one right answer' to many questions, both in school and in life, then their creative confidence will grow. The most important thing of all is for learners to lay the foundation of their personal creative abilities, on which they will build throughout their lives

Incorporating creativity into classroom practice across the curriculum

Problem solving and enquiry are at the heart of learning. By definition, they require learners to think hard using their existing understanding to engage with the question or problem at hand and work out solutions.

Pitching questions or problems at exactly the right level to stretch student thinking, and providing just enough support, is the mark of a good teacher. How teachers present problems and questions will vary depending on student age, the local culture, the discipline being studied and many other factors. There is a place for a wide range of approaches including whole-class instruction as well as individual and group collaborative work, and some variety is important.

Sometimes it is incorrectly assumed that creativity occurs best in group work with the teacher acting as a facilitator. In fact, direct instruction involving the whole class can encourage creativity as long as the classroom culture is supportive and the class focuses on powerful questions and problems. It is important to note that direct instruction, well done, is identified in John Hattie's work (2009, p. 204) as a highly effective approach to teaching and learning. Direct instruction should involve a highly skilled active process in which the teacher engages and challenges student thinking, responding quickly to student thinking as it emerges. Discussions are focused on important concepts and ideas with questions from students. The teacher stimulates thought and encourages new ideas and new ways of thinking. Both students and teachers see errors as guiding what still needs to be learned rather than signalling failure.

Enquiry-based learning is often associated with student-led projects. In this context learning involves a teacher and/or learners setting a meaningful problem or question which challenges and extends learners' understanding over an extended period of time. Projects could be within one subject or combine two or more subjects. The problems or questions may be open ended, complex and multi-faceted. Projects often culminate in learners doing a presentation of their work to the rest of the class, but the 'product' created could be something that is made public such as a blog, website, exhibition or magazine. By its nature, project-based learning involves learners using reflective, creative and critical thinking skills in collaboration with others.

For project-based learning to work well it is important that the learning objectives are clear, supportive of the broader curriculum, and the teacher plays an active role in supporting the development of student understanding. This may involve the teacher standing back for long periods, allowing students to explore and experiment and think through the problem, but they need to be active in challenging student thinking and bringing learning to a productive conclusion. Cambridge Global Perspectives (considered in Chapter 7) provides well-structured examples of this approach.

One advantage of enquiry-based learning is that it provides an opportunity for learners to collaboratively explore a question or problem from multiple perspectives using lateral as well as linear thinking. Edward De Bono is credited with inventing the concept of lateral thinking and has developed a number of approaches including the Six Thinking Hats (1993, p. 54), a strategy that can be used to help learners at all levels and in any subject, to think about a question from multiple perspectives (see De Bono in the Resources section).

Using questions to trigger creative thinking

Socrates (470–399 BC), popularised through Plato's writings, believed the best form of teaching was through using skilled, disciplined questioning to deeply explore ideas resulting in improved understanding. This technique has become known as 'Socratic questioning' and is a fundamentally important teaching and learning approach in all disciplines. A good question, from the teacher or student, has the power of making student thinking visible and is a natural part of the ongoing feedback loop in classrooms between students and teachers, helping to guide the instructional process.

On average, teachers ask between 300 and 400 questions a day (Leven & Long, 1981, p.29). If a teacher carefully plans the type, wording and delivery of questions that they are going to ask in a lesson, research shows that the quality of learners' thinking and responses will improve (Budd Rowe, 1986, pp.43–50). Questions that stimulate responses that require complex mental processing can encourage creativity. What if...? and Why…? questions tend to stimulate creative and critical thinking, especially if followed by more questions that probe and encourage the learner to go further (Kazemi, 1998, pp.410–414).

Asking learners to think of their own questions is a particularly valuable activity. Guy Claxton (cited in Scales, 2013, p.250) points out: 'Asking good questions is the basis for becoming a successful learner. If children aren't asking questions, they're being spoon-fed.' A learner formulating a question can illuminate their current thinking, helping to guide instruction, as well as being a creative activity in its own right. Encouraging learners to ask questions can:

- develop their curiosity about the subject, helping with engagement
- stimulate learners to 'think hard' about a topic
- consolidate a learner's understanding of the material
- enable learners to look at a topic from different perspectives
- clarify a goal or plan for their own investigations
- inspire them to want to find out the answer.

One line of questioning that can encourage creative input is 'possibility thinking'. This requires learners to explore ideas and use their imagination to generate lots of possibilities. If a teacher regularly asks questions that have more than one answer during lessons, this can develop an atmosphere where learners feel that their unique contributions are welcomed and valued. This helps learners to develop their creative disposition as described earlier in this chapter.

Table 12: Examples of possibility thinking

Consider asking your learners questions that have more than one possible answer

In maths: 'How many ways can you find to make 24 using any mathematical operation?'

What was the question?
'The answer is… 1989, … what was the question?'

Give learners a word or number that could be the answer to many different questions in your subject. For example, the question could be:

- When did the Berlin Wall fall?
- In which year did South Africa start to dismantle the apartheid system?
- In which year did the Cold War end?
- Which year saw the dissolution of the Soviet Union?
- Which year saw the end of the Soviet Union's occupation of Afghanistan?
- When did Tim Berners-Lee produce the proposal that led to the World Wide Web?

Thinking routines, introduced in Chapter 3 (see Harvard University's Project Zero 'Visible Learning' resources at the end of the chapter) can be helpful in generating questions and nurturing critical and creative thinking skills, emphasising the use of discussion and collaboration in the classroom. One example of a thinking routine is below in Table 13. This can be adapted to almost any subject or context to prompt thinking and questions from learners.

Table 13: Harvard Project Zero – Artful thinking routine: See/Wonder/Connect

This thinking routine is useful to trigger questions and thinking about a topic for which you have a related photograph, artwork or object. For example, photographs of a specific place for a geography case study.

See: Show learners an artwork, photograph or object that relates to your subject. This could be in an art gallery, or the classroom.

Wonder: Brainstorm a list of 3–5 questions about the artwork. Use these question stems as starters:

I wonder… Why… What are the reasons… What if… I am puzzled by… How would it be different if… What if we knew…? If I could interview the artist/maker, I'd ask…

Connect: Compare the artwork/object/photograph to others you've seen. How are they similar? How are they different?

The questions that learners formulate should be recorded and displayed if possible, to show the value that the teacher places on them

Mathematics, creativity and innovation

'Creativity is what maths is all about… We're coming up with some completely unexpected patterns, either in the reasoning or the results… We're thinking in terms of beauty and creativity, but the outside world thinks of us like a computer' (Sir Andrew Wiles, who proved Fermat's Last Theorem).

The Fields Medal is the mathematical equivalent of the Nobel Prize, awarded to mathematicians who have made major contributions to the field. In 2014, it was awarded to a successful young mathematician called Manjul Bhargava. His achievement was to simplify a very complicated mathematical 'proof' from the 18th century into a few lines. He was inspired by seeing a Rubik's Cube in his room, and imagined that the numbers that he was working on were applied to the corners of the Rubik's Cube. 'If you think about things the way someone else does, then you will never understand it as well as if you think about it your own way,' he said about the creative process that led to his breakthrough.

That mathematics is still being created often comes as a surprise to most students, and many teachers. Their perception is that mathematics is the one subject in which you know conclusively that you have the right answer. Indeed, many students prefer mathematics over other subjects precisely because of this. The misconception arises because they believe that calculation, and solving routine problems such as those assessed in qualifications, is mathematics. In fact the whole point of learning mathematics is to solve problems, including those which are non-routine, and that of course involves thinking creatively.

While Fields medallists – who are certainly exhibiting Big-C creativity – come along only once in a while, there are plenty of opportunities in mathematics lessons to support students in becoming creative mathematicians of the small-c or mini-c variety. Indeed, a mathematics scheme of work that does not include opportunities for students to think mathematically – to explore, discover, imagine and produce some mathematics which is original to them – needs serious adjustment.

So what does creativity look like in the mathematics classroom?

Firstly, creativity is considerably inhibited if students do not have an adequate mathematical toolbox. In other words, they need to have a reasonably secure base of

knowledge and skills to draw on. However, creative activities should not be restricted to those who are already good mathematicians. The very act of being creative can itself enhance students' understanding and fluency, so such tasks are suitable for all.

To support students in being creative, teachers offer tasks and activities which allow students to:

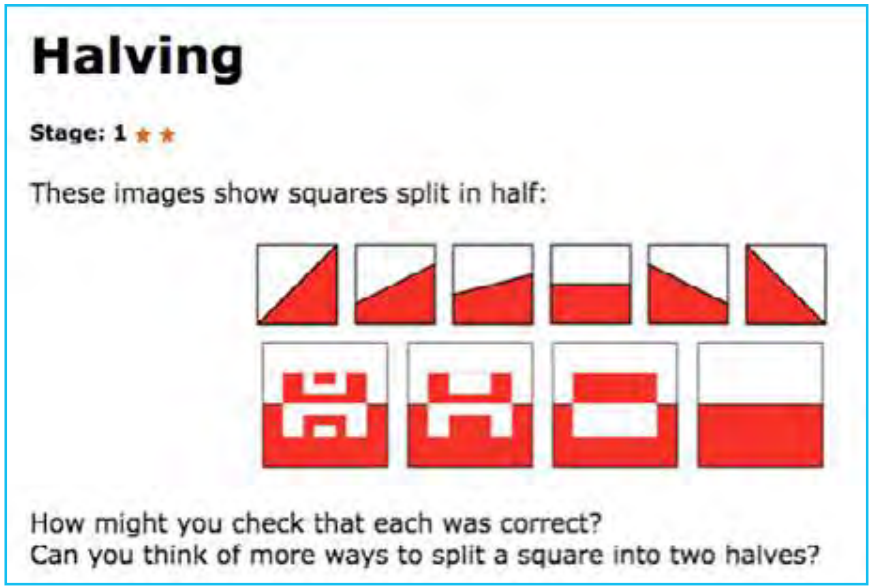
1. **Find multiple ways of solving a problem.**
2. **Ask their own questions as well as answering the teacher's.**
3. **Discover relationships, patterns and make connections that are new to them.**
4. **Conjecture about the results of making changes.**

The NRICH project (**www.nrich.maths.org**) offers 'low threshold, high ceiling' tasks. These are open-ended tasks which everyone can begin, but which have enough challenge built into them to occupy the most confident and competent, so they are suitable for whole-class teaching.

Next are four examples of such tasks.

1. Finding multiple ways of solving a problem

This activity, recorded on squared paper (with square size appropriate to age of student) supports the concept of equivalent areas. The examples offered show identical halves and the majority of students will be able to replicate this idea. However, creative individuals will look for examples where although the areas are equivalent, the shapes of the halves are not the same. This is an example of students devising their own solutions and simultaneously extending their idea of a half, and of area. To see how students solved this, visit **nrich.maths.org/1788/solution**



2. Ask their own questions

The mathematics in Got It! is quite trivial – adding small numbers. However, to 'solve' the question, students have to work out how to win. This requires asking the right questions and trying out lots of strategies. The question includes some 'high ceiling' hints such as changing the target – but students have to choose wisely if they are to succeed. For an interactive version visit **nrich.maths.org/1272**



3. Discover relationships

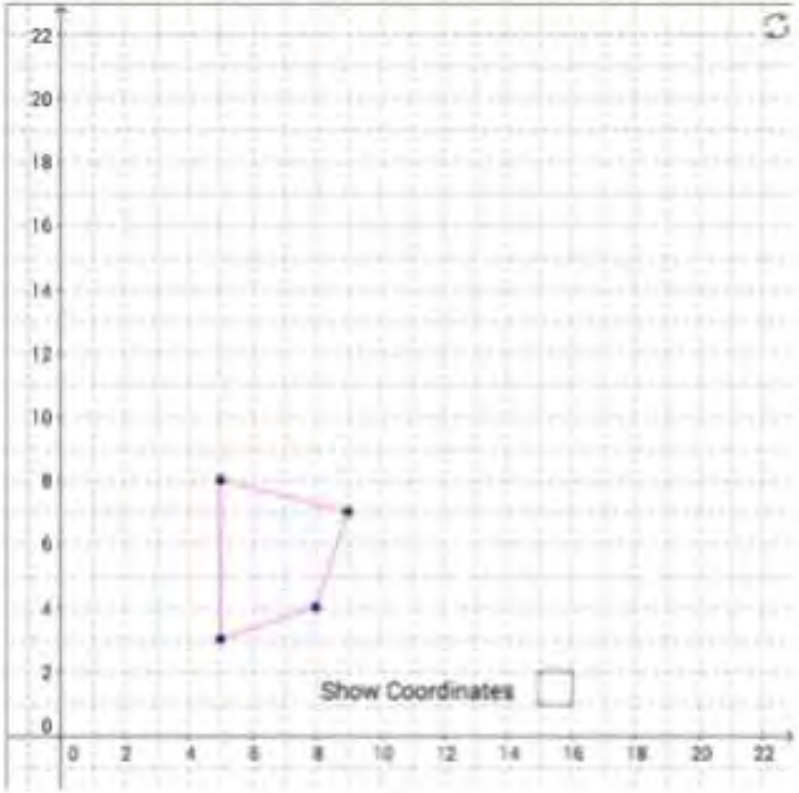
This interactive task allows students to play around with the characteristics of squares, using visual clues initially. To solve the last question, they have to focus on the coordinates and are then confronted with the idea that points in certain relationships have coordinates that fit a pattern. This activity highlights the power of digital technology to provide instant feedback – a hugely important part of working creatively. Visit **nrich.maths.org/10733** to find out more.

Coordinates of Corners

Stage: 3 and 4

This resource is part of "Dotty Grids - Exploring Coordinates and Vectors"

Move the dots below to make some squares. Can you make a variety of squares whose sides are not parallel to the axes?

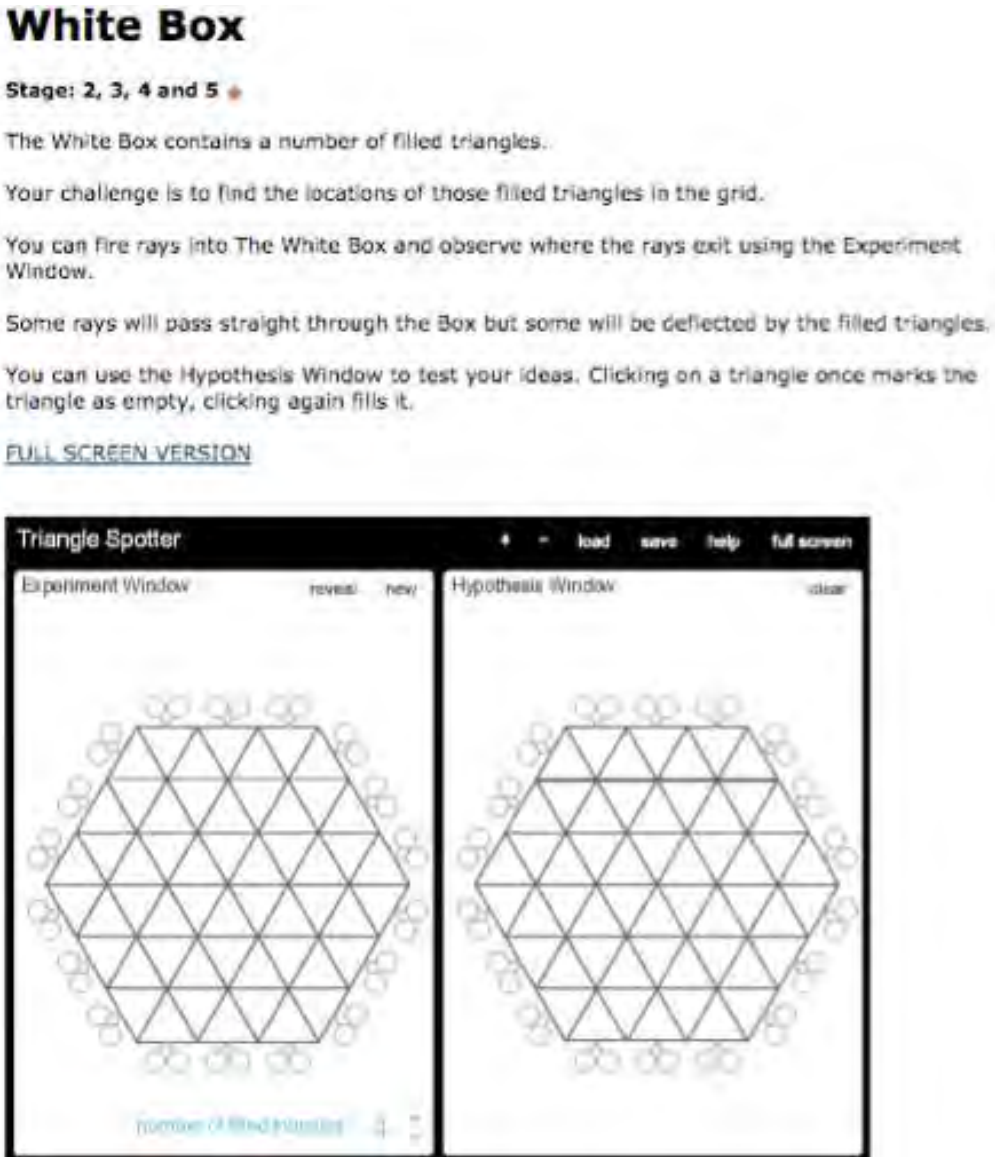


If you have a set of four coordinates, is there a quick way to decide (without drawing) whether they form a square?

4. Conjecture about making changes

White Box (**nrich.maths.org/7007**) models the scientific process of working out the structure of atoms and molecules. It is an ideal activity to support students in making conjectures or hypotheses, as they work systematically to change the layout, record their findings and deduce what is happening. Where must the triangle be to produce that result? What if I move it to…? As with 3 above, these modelling-type questions would not be possible without immediate feedback.

A proficient mathematician therefore needs not only a thorough knowledge and understanding of the subject matter, but they also need creative thinking skills to be able to manipulate that knowledge and to become truly innovative.



Science and creativity

Science is not only a body of knowledge to be learned and understood, it represents a powerful method in identifying and solving problems with a significant creative component. Well-planned, structured enquiry is fundamental to science teaching as it reflects the scientific method: curiosity based on existing knowledge, hypothesis formulation, systematic observation, measurement and experimentation leading to new insights. A deep understanding of the scientific method provides powerful knowledge to students, preparing them for further study in science and helping them to understand applications beyond science. One simple example of enquiry-based learning in science that offers the potential for creative thinking is in Table 14, below.

Table 14: An example of a low-tech tinkering activity: Marble Machines (Winterbottom et al, 2016, p.14)



Cambridge teachers exploring the idea of scientific tinkering

In this activity the participants choose from a wide selection of recycled materials and low-tech tools (for example, scissors, sticky tape, cardboard, elastic bands, pipe cleaners) to achieve the goal of 'getting a marble to move from the top of the pegboard to the bottom as slowly as possible'. The imposed condition 'as slowly as possible' is important. Without it, it's too easy, and the goal is too closed.

Through their explorations, participants may engage in 'engineering' (for example, working out the best materials to create a funnel), 'making' (for example, building a run from cut-up tubes) and 'tinkering' (playfully experimenting with the different materials as they develop their thinking and set new short-term goals).

In a science lesson, this could be a starting activity to help learners to encounter ideas about forces and motion before any of them have been taught the ideas theoretically. By imposing the 'as slowly as possible' condition, learners use intuitive ideas about friction. They also use ideas about rotational movement, linear movement, acceleration and velocity. When they have misconceptions about those topics, this activity can help expose them, and enable the learners to discover that they have misconceptions.

However, most of the time, this is not used in the context of a specific topic in science. It is more there to foster skills, and understanding of the nature of science, including hypothesis setting (albeit informally), testing, controlling for variables and collaboration.

What can we learn from the arts?

Arts subjects such as art and design, music, drama and dance are often associated with creativity and innovation. A broad and balanced curriculum (see Chapter 2) recognises that encouraging the arts can help students to develop their own creative voice and creative thinking skills. Studying an arts subject can also build learners' self-confidence as they feel valued for their unique contributions and talents. When encouraging creativity across the curriculum, it can be useful to look at the ideas and techniques that underpin the teaching of creative subjects such as art, drama and music.

Learner autonomy: Arts subjects can be popular with learners because of the perceived high level of learner choice that is involved. Learners often work on projects that they have devised themselves, according to their own interests and passions. Unique and original work is particularly valued, in both informal and formal assessments. When learners take control of their work in this way, their levels of intrinsic (internal) motivation tend to increase (Craft, 2005, p.56).

Valuing uniqueness: Every learner's outcome will be different in arts subjects. The idea of there being 'no one right answer' is deeply embedded in both the teachers' and the learners' approaches. Although other subjects have more fixed subject matter, it is important for students to learn that there is often more than one correct answer or more than one way to arrive at an answer.

Experimentation and play: In all arts subjects, there is an emphasis on experimentation and 'play'. An art teacher will introduce a technique or material, for example acrylic paint, and learners try it out. This may initially involve copying examples and practising. Boden (2001, cited in Ferrari, Cachia & Punie, 2009, p.19) describes this as 'exploratory creativity', and likens it to a jazz musician learning to improvise based on a defined set of chords or scales. Having developed some degree of skill, learners can then start to experiment and push the boundaries of the material or technique. They may choose to combine it with another technique or idea to produce something that is original to them. Boden calls this 'combinatorial creativity' – the generation of new ideas by combining or associating existing ideas.

There is a role for experimentation and play in all disciplines so that students learn to use their imagination and develop engagement. As in arts subjects, this must be balanced with, and be supportive of, skill development so that it supports students' basic literacies.

Looking at and discussing artworks: The study of artworks is not necessarily limited to art or art history lessons. Images of artworks can be used to prompt thinking in any subject area. Teachers can use carefully chosen artworks to prompt discussions and deeper critical thinking about a topic. Visual Thinking Strategies (VTS), developed by Yenawine (2014, p.25; see the Resources section) uses art to help learners of any age to develop their visual literacy, thinking and communication skills, and is an excellent resource.

Journals, notebooks and sketchbooks: Keeping a notebook, sketchbook or journal is an essential part of an art and design education. All the creative skills can be practised through the discipline of keeping a record of a learner's observations, ideas, reflections and collections. By recording and collecting a wide range of information, a learner can then start to cultivate creative connections between different elements and come up with more unique and original ideas. Notebooks and journals have been used by many great creators, such as the poet Lord Tennyson, who recorded fragments of thought and then generated connected words and images which led to his poetry (Michalko, 2001, p.58). Charles Darwin kept detailed journals on his travels to the Galapagos Islands, and his journals contain a record of his tentative diagrams of the branching system on which he eventually based his theory of evolution. Guy Claxton (2006, p.353) recommends encouraging learners 'to keep a commonplace book… in which they keep scraps of overheard conversation, images, quotes, fleeting thoughts that didn't go anywhere… as most creative writers, scientists, composers do'.

The value of failure: The arts, perhaps more naturally than other subjects, accept and celebrate failure as a learning opportunity and understand that it is an inherent part of the creative process. As West-Knights (2017, p.49) points out: 'One of the mainstays of drama classes… is the notion that mistakes are OK, as long as you are trying things out.'

Peer review and feedback: Peer review sessions (sometimes called group critiques) are commonly used in art and design as a method of informal interim assessment. Learners present their work to small groups of their peers and receive constructive feedback. The process is carefully scaffolded by the teacher, who leads initial sessions, modelling the types of questions and comments that are appropriate. When successful, peer reviewing helps learners to build independence, gain insight into their peers' working and thinking processes, and develop confidence in themselves as creative individuals.

Making connections: mind mapping

As illustrated in figure 6 on page 58, mind maps (sometimes called concept maps or spider diagrams) are a flexible and powerful tool for representing information and nurturing creative and critical thinking. Originally popularised and developed by Tony Buzan in the 1970s, mind maps are designed to 'harness the full range of cortical skills' (Buzan, 1986, p.45) by using key words, colour, images, number, logic, rhythm and spatial awareness.

Mind maps are essentially diagrams that visually organise information. They normally consist of a central concept, which is expressed with a key word or short phrase. Related ideas branch off from this, spreading across the paper, which is usually in landscape format to give the optimum space for ideas to be written. Each main branch that emerges from the central theme can then branch out further to related sub-sections.

The theory of semantic network models (Collins & Quillian, 1969, p.240) helps to explain why mind maps are effective. Each learner has their own unique understanding of any subject at a particular time based on their own personal associations and connections. The act of creatively constructing mind maps requires students to think hard about what they are learning and to build new connections. Learners will find it easier to remember information by building their own personal representation of understanding. It is impossible to create a mind map without active engagement and thinking through the construct being mapped. Building up a large amount of information on a page also encourages creativity. Learners can make connections between topics, which they may not see while studying a dense block of text. Mind maps can be used in a number of ways including:

- Note taking. The act of creating a mind map requires chunking of information and concepts, relating them to each other. This can be helpful both in developing understanding and helping to memorise information. It makes the process of note taking active rather than passive. At the end of a unit, a teacher might ask learners, individually or collaboratively, to create a mind map of what they understand about a topic that has been covered. Many learners find mind mapping a very useful technique when revising for exams, as the process of reformulating their notes into a new structure is in itself a memorable activity.
- Planning essays, presentations or projects. By using key words, learners can fit large amounts of information onto one page, allowing them to get an overview of a topic and to plan information strategically.
- Clarifying, analysing and re-defining problems or questions. This helps learners to uncover new perspectives, to build higher-level thoughts and to develop understanding, analysis, synthesis and evaluation.
- Making connections. This supports the development of holistic and disciplinary understanding through connecting ideas from different topics or different subjects.

Mind maps are an extremely versatile and accessible approach to help visualise and understand material. Many learners, including those who have dyslexia or other learning difficulties, find mind maps very useful, and they can be used to support learning in all disciplines. Research by Park and Brannon (2013, pp.2013–2019) found that training learners to use visual and spatial representations significantly improved their performance in mathematics, even when undertaking numerical problems. Research has shown that mind mapping is more effective as a means of knowledge retention and transfer than attending lectures, participating in class discussions or reading text passages alone (Nesbit & Adesope, 2006, p.434).

For more information on mind maps see the references and resources at the end of this chapter.

Assessing innovation and creativity

As argued already in this chapter, the outcomes of creative processes are incorporated naturally into teaching and learning. Teachers can assess them when students complete an assignment or task and have demonstrated creativity.

Because creativity is a process inherently linked to reflection, it is often valuable to assess progress at appropriate points in the journey. This needs to be done sensitively. If learners or teachers are too critical of ideas during the ideas generation phase, they may find that they dismiss all their ideas and do not have anything to work with.

Creativity lends itself to self-evaluation, peer evaluation, process/progress learning diaries (sometimes called process or progress journals), portfolio assessments, blogs, presentations and exhibitions. As Rachel Logan, Product Manager for Art and Design at Cambridge explains: 'We are assessing how well they have thought "around" a problem, not necessarily how well the solution works.' She adds: 'It's vital that learners have critically evaluated their outcomes, but in the end it's mostly about the process that they went through to get there.'

Ellis and Barrs (2008, p.78) have developed a generic rubric to informally assess creative learning. Rubrics are designed to clarify criteria and standards against which students' work can be assessed. This focuses on the processes involved in creative work, including investigation, skills, discussion, evaluation and reflection. The rubric is intended for use in a primary classroom, but could be adapted for any level.

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Resources

Questioning

Rothstein, D. & Santana, L. (2015). *Make just one change: Teach students to ask their own questions*. Cambridge, MA: Harvard Education Press.

This practical teachers' guide describes the 'question formulation technique' as developed by the authors over several years of working with learners across a range of socio-economic backgrounds, including bilingual learners. The book goes through the strategies step by step and gives examples of how teachers of different subjects have implemented the technique.

Essentially, the strategy is to prompt learners' curiosity with a 'question focus' which could be an image, statement or audio-visual stimulus. Learners then create questions through divergent thinking routines. They then prioritise and improve these questions with help from their teacher. Finally, a range of possible next steps are suggested as to what learners might do with the questions. These include 'do-now' activities, identifying topics for further research and investigation, preparing for tests, providing formative assessment information for teachers or preparing a research agenda for the next unit of study.

Educating for Creativity: Level 1 Resource Guide
www.creativeeducationfoundation.org/wp-content/uploads/2015/06/EFC-Level-1-FINALelectronic.pdf

This guide from the Creative Education Foundation gives lots of useful tips about how to encourage your learners to solve problems creatively. The creative problem solving (CPS) process is based on the Osborn-Parnes CPS model. There are descriptions of brainstorming-type activities for cross-curricular projects. The ethos behind this model is to encourage an environment in which creativity and innovation can thrive using a range of techniques and strategies. The authors aim to nurture creative skills which will become an integral part of learners' work and life in future.

Buzan, T. (1996). *The Mind Map book*. New York, NY: Penguin.
One of many publications by Tony Buzan that explores the possibilities of mind maps and explains how they are best generated.

De Bono, E. (1993). *Serious Creativity: Using the Power of Lateral Thinking to Create New Ideas*. USA: Harper Business.
Although primarily aimed at a business market, this book contains very detailed descriptions of how to implement Edward De Bono's many lateral thinking tools, including Six Thinking Hats, Provocations, Random Input and more. There are also suggestions for how to run training or set up a creative thinking session, which could easily be adapted for use in schools.

Online resources from Edward De Bono
Edward De Bono's CoRT thinking tools are described in this resource, along with many other ideas for using questions to trigger critical and creative thinking:
www.nsead.org/downloads/Effective_Questioning&Talk.pdf

Instructions and descriptions of De Bono's CoRT thinking tools with examples:
http://elearnmap.ipgkti.edu.my/resource/gkb1053/sumber/CoRT1-4.pdf

Simister, C. J. (2009). *The Bright Stuff: Playful ways to nurture your child's extraordinary mind*. Harlow: Prentice Hall LIFE.

This book contains a large number of creative thinking ideas that could be incorporated into all levels of teaching.

Craft, A. (2000). *Creativity across the Primary Curriculum: Framing and Developing Practice*. London: RoutledgeFalmer.
This is an inspiring read, practical but informed by theory and research. Anna Craft explores core principles and the different subjects, and considers ways in which teachers can develop a more 'creative mindset' towards the curriculum and pedagogy.

www.amazon.co.uk/Unlocking-Creativity-Teaching-Curriculum-Teachers/dp/1843120925

Fisher, R. (2005). *Unlocking Creativity: Teaching Across the Curriculum: A Teacher's Guide to Creativity Across the Curriculum*.
A comprehensive guide to incorporating creative approaches into your lessons. It has sections on specific subjects including maths, creative writing, drama, science, design technology, geography, music, art and religious education.

Scoffham, S. (Ed) (2004). *Primary Geography Handbook*. Sheffield: The Geographical Association.
This subject-based handbook for teachers has a wealth of tried and practical examples of creativity applied to geography. Chapters on 'Young geographers', 'Geography, creativity and place', 'Geography and the emotions' and 'Making geography fun' show how creative teaching and promoting creative thinking in children is central to a subject not usually thought of as creative.

Yenawine, P. (2014). *Visual Thinking Strategies: Using art to deepen learning across school disciplines*. Cambridge, MA: Harvard Education Press.
An in-depth explanation of visual thinking strategies (VTS) as mentioned in this chapter. This is a teacher's guide to the VTS project, which started as a collaboration between the education team at the Museum of Modern Art, New York and academics at Harvard University. It includes lots of examples of how to implement the strategies as well as written records of typical conversations in classrooms where VTS is being used.
www.visiblethinkingpz.org/VisibleThinking_html_files/03_ThinkingRoutines/03d_UnderstandingRoutines/ThinkPuzzleExplore/ThinkPuzzleExplore_Routine.html
This site contains excellent resources explaining a wide range of thinking routines developed by Harvard Project Zero, including this 'think, puzzle, explore' thinking routine. These activities are easily adaptable to any learning situation for any age. There are also videos of the routines in use in classrooms.

Compass Points thinking routine from Harvard Project Zero:
www.visiblethinkingpz.org/VisibleThinking_html_files/03_ThinkingRoutines/03c_Core_routines/CompassPoints/CompassPoints_Routine.html

Project-based learning resources

www.bie.org/resources
The Buck Institute for Education, USA. This site contains resources and case studies on successful project-based learning.

www.hightechhigh.org/htm/projects
High Tech High in San Diego, USA. Examples of learner projects with learning outcomes and teacher reflections.

https://jennyluca.com/2012/10/02/project-based-learning-giving-it-a-go-in-an-english-classroo
This blog explains one English teacher's experiences implementing project-based learning in her English literature classroom, studying Romeo and Juliet.

www.bie.org/object/document/english_learner_scaffolds_for_pbl
English literature project-based learning scaffolding guide.

Tinkering

www.museoscienza.org/tinkering-eu/download/Tinkering-A-practitioner-guide.pdf
This document explains the background behind the tinkering movement, and gives detailed guidance on how to design and implement tinkering activities. Although the examples are design-technology based, they could be adapted for science or art lessons.

www.raeng.org.uk/education/schools/teaching-and-learning-resources/curriculum-resources
The Royal Academy of Engineering (UK) offers a range of resources for teachers of STEM subjects (science, technology, engineering and maths). The lesson plans include topics such as 'Desert', which looks at how people and animals survive

in the desert. Activities include learners designing a 'fog catcher' based on their understanding of condensation. It includes handouts and resource lists.

Creative thinking for school leaders

This is a more generalised guide to creative thinking, aimed at school leaders: Kampylis, P. & Berki, E. (2014). Nurturing creative thinking. International Academy of Education, UNESCO.

Creativity through making

https://www.gse.harvard.edu/news/uk/14/10/learning-making

https://www.weareteachers.com/making-matters-how-the-maker-movement-is-transforming-education

Rubrics for creativity

https://ccgiftedcollaborative.wikispaces.com/file/view/6+Creativity.pdf

http://ec.europa.eu/research/science-society/document_library/pdf_06/report-rocard-on-science-education_en.pdf

Chapter 5: Student wellbeing

Overview

Learning is embedded in emotional states. A confident, responsible, reflective, innovative and engaged learner reasons and makes decisions on the basis of positive personal values and an understanding of their emotions. This chapter looks at the profound impacts of wellbeing and stress on learning and performance. Most of it has been written by the author and speaker Nicola Morgan, informed by presentations she gave in 2016 at Cambridge Schools Conferences.

Schools should care about wellbeing and stress because it is the decent and fair thing to do. However, they also need to care because wellbeing and stress management directly affect students' outcomes at school as well as their ability to thrive in later life. The concept of resilience is often used to describe people's ability to deal with pressure and stress effectively. It is a life skill that schools need to nurture. All students will encounter adversity and barriers to learning. The resilient will overcome these, helping them to fulfil their potential.

This chapter considers a number of potential pressures that can have an impact on young minds. Adolescent brains are different from those of mature adults in significant ways. The world in which young people operate is dominated by technology and social media, and this is creating new pressures that need to be understood. This chapter ends with some practical strategies for schools to improve stress management, increase wellbeing and empower students to manage their lives.

The adolescent brain

Adolescence can be described as a progressive transition from childhood into adulthood. During this phase teenagers go through profound changes in brain and functional development. These changes affect young people in different ways and to different extents, but it is important for teachers and other adults close to young people to recognise this.

For example, scientific evidence (Casey, Jones & Hare, 2008) suggests a neuro-biological reason for high-risk-taking and impulsive behaviour and emotional reactivity in adolescents. Emotional processing that occurs in subcortical limbic regions is particularly powerful in relation to control exerted by the prefrontal cortex area of the brain. This means that in situations that are personally emotionally charged, adolescents tend to rely less on intellectual reasoning and more on their feelings. If the situation is not emotionally charged, for example if an adolescent is asked a hypothetical moral question, logical reasoning will dominate.

The development of the social brain during adolescence supports the observation that during this period of life individuals may be more susceptible to social pressure to seek status with peers and also to embarrassment in social situations. Peer influence is an extremely important driver for behaviour at a time when adolescents are moving away from the protection of their family unit and building new groups (see Blakemore S.-J., 2014, for much work on the adolescent social brain). The importance of self-image in front of peers is particularly heightened during adolescence.

What is wellbeing?

Wellbeing describes a state of overall mental and physical health, strength, resilience and fitness to function well at work and personally. It was brought into the public and educational domain by positive psychologists, notably Seligman (2011), and offers an alternative to the goal of 'happiness', which tends to describe a transient, short-term state which cannot logically or practically be sustained for long. 'Happiness' itself – that active emotion, 'how I feel now' – is highly reactive, depending on the right things happening to or around the person. When a sad, worrying or difficult event or thought occurs, that feeling of happiness necessarily ceases or decreases. Happiness is hard to control, being immediately dependent on both an internal mindset and external factors.

'Wellbeing' is more stable and resilient. Although it is somewhat affected in the longer term by outside influences, when a sad, worrying or difficult thing happens, wellbeing is not immediately affected. In fact, a good state of wellbeing offers some protection against difficult outside events. One might say that wellbeing is a background state, whereas happiness is a temporary response to stimuli. Wellbeing helps cause success and good function; happiness is caused by them (among other things).

Wellbeing is neither permanent nor innate. It is a state of mind and body which is acquired over time and can be lost over time. It forms a valid part of a school curriculum because:

- it has profound direct effects on learning and performance
- it affects relationships with peers, family and teachers
- many aspects can be (to a valuable extent) within the control of an individual who has learnt good practices
- not being fixed, it is vulnerable over time to external events; therefore the individual needs to build a bank of wellbeing for resilience
- understanding about and strategies for wellbeing gained at an early age can be used at all stages of the individual's life – wellbeing management is a genuine life skill
- it explicitly affects learner attributes as students can better 'understand themselves as learners' when they understand some influences that directly affect their ability to learn easily
- for all these reasons, it falls into the competency category of Living in the World.

In summary, people with good wellbeing feel generally healthy, sufficiently positive, able to focus on the task in hand and ready to deal with whatever occurs. They have reserves of physical and mental health, and resilience, to help them deal with more negative events or challenges. Crucially, people with good wellbeing can proactively manage stress, rather than suffer from it. For more insights see Dodge, Daly, Huyton & Sanders (2012).

What is stress and what problems does it create?

Stress is a positive, life-enhancing and even life-saving biological response to threat or the need for peak performance. Its fundamental function is to respond instantly to physical threat or danger and optimise the powerful 'fight or flight' response in the brain.

When threat occurs, the brain (first the amygdala, followed by the hypothalamus and pituitary gland) instantly triggers the release of chemicals, most importantly the hormones adrenaline (in the US epinephrine) and cortisol. These combine to speed up the heart and breathing so that blood (carrying oxygen and glucose) is pumped quickly to the muscles of legs and arms, enabling them to be stronger than normal and to move faster. The nervous system is stimulated and the brain instantly becomes super-alert, focusing acutely on the threat, rapidly reacting to and choosing options to deal with it. The individual is likely not to notice less irrelevant things (including pain) and instead focuses on the task in hand: to survive and win, whether by fighting or fleeing. The physical feelings produced by these chemicals are somewhat unpleasant but this state of discomfort and agitation is required to stimulate the individual to act.

Thus, in a situation of threat, the stress response allows the individual to super-perform: to run faster, jump higher, fight harder, focus better and react more quickly and strongly, both mentally and physically, than under relaxed circumstances. 'Threat' is not confined to physical danger such as being chased by an aggressor or predator (the original biological purpose). It applies to all situations where a creature is required to super-perform or deal with challenge: exams and tests, competitions and matches, arguments and debates, any performance or situation where people are looking at the individual. Even apparently small things such as being asked a question one does not know the answer to, being addressed by a stranger, noticing that one is late for something, a person saying something hostile, something unusual or unpleasant or strange, hearing about a frightening or tragic event, having an anxious thought: all these activate the biological stress response. And the aim in every case is the same: to enable survival and success.

Therefore, stress is not something to avoid or fear. It is natural and healthy and facilitates best performance. In that case, why do we tend to frame it negatively? Why do some people 'suffer' from stress and become ill, under-performing instead of super-performing? Exactly what are the problems with stress?

Clearly, people do suffer from stress. Stress-related illnesses lead to time lost from school and adult work. Suffering from stress is very unpleasant and spoils our enjoyment of life. But we should be clear about the exact problems if we are to avoid meaningless clichés and if, crucially, we are to understand and act on some solutions.

There are three main ways in which stress can be a problem, whatever the age of the individual. We will later look at some ways in which teenagers may respond differently and reasons why some extra attention may be needed for that age group.

1. Panic: too much adrenaline response can lead to a feeling of panic or a full panic attack.
2. Cortisol build-up: cortisol doesn't disappear quickly once the threat is over and the build-up can lead to many short, medium and long-term problems.
3. Preoccupation: when our mind is occupied by something, we have less 'bandwidth' to focus on necessary tasks, so performance suffers.

Let us look in more detail at each problem. Later in this section, we will look at solutions.

The panic response and the effects of cortisol build-up

An over-production of or over-reaction to adrenaline makes the heart race to the extent that, instead of feeling focused and ready, we feel panicky, out of control. Most people will have experienced this. One feels overloaded by information and messages, while experiencing uncomfortable physical symptoms, such as shallow breathing, a racing heart or palpitations, sweatiness, nausea and even, sometimes, vomiting or diarrhoea. Usually, this passes quickly once the anticipated event (such as an exam, sporting match or public performance) is over. However, the individual may feel so uncomfortable that he or she focuses more on the discomfort than the performance.

Sometimes, this leads to a panic attack. A panic attack is different from a more ordinary feeling of panic in two ways: first, it is usually in response to something relatively minor rather than something commonly recognised as terrifying. This means that it can be unpredictable and sufferers may become anxious about the possibility of a panic attack. Fear of a panic attack can trigger a panic attack. Secondly, the severity is such that the sufferer loses control; the need to get away from the stressful situation can lead to running from the room, failing to notice what one is doing; sufferers commonly really believe (falsely) that they may die.

Whereas adrenaline dissipates quite quickly from the body once the threat or perceived threat has passed, cortisol lingers. Today's stresses tend to be frequent and lingering, rather than the occasional life-threatening ones that the stress response evolved for, so there is a huge opportunity for cortisol to build up.

Possible effects of cortisol build-up are wide ranging, and directly affect wellbeing, function and performance in all areas of life, including home, social and school. A function of cortisol that helps explain this is that it supresses some bodily functions that are 'unnecessary' in the moment of stress: including protective mechanisms such as the immune system. So we become temporarily vulnerable and this vulnerability can linger after the stress trigger has passed. It is often impossible to be clear which of the following are directly caused by cortisol build-up or simply a more general repeated assault on the stress system, but factors commonly associated with persistent stresses leading to cortisol build-up are:

- sleep problems – difficulty in getting to sleep; also waking in the night or early in the morning and not being able to return to sleep
- poor concentration (which is also damaged by poor sleep)
- weaker immune system – it is common to be prone to minor ailments when suffering stress build-up
- other physical health problems – many illnesses may be worsened or some even triggered by stress; people with unconnected health problems may take longer to recover when under stress
- repeated headaches and stomach-aches
- change in appetite and therefore weight gain or loss – people may either lose appetite or be drawn to more unhealthy foods, particularly sugar and other carbohydrates
- low mood – which can lead to problems in relationships and lower self-esteem
- irritability – also affects relationships and self-esteem.

Preoccupation

This interesting and complex topic is relevant not only to the effects of stress on learning and performance but also to the widespread problem of distraction and multi-tasking in today's technology-dominant society. This will be mentioned in more detail later in the chapter but here let's look at preoccupation in relation to stress.

It is helpful to think of the brain as working on a 'bandwidth' principle (see Mullainathan and Shafir 2014), using the analogy of broadband bandwidth. The capacity of connection to the internet (whether fixed or wireless) is finite. If someone using the same line is doing something that occupies much bandwidth, everything else is slower. The brain works analogously. We have a finite amount of bandwidth or processing power, and different activities (both mental and physical) occupy different amounts. Some occupy little – those we have become expert in and which require little concentration, such as walking, clapping hands, routine tasks such as brushing our teeth. Other activities occupy a lot – complex or unfamiliar ones, or any we sense require a lot of concentration, such as reading complex or new material, writing, solving a problem, listening to instructions (see Levitin, 2014 for a comprehensive overview).

One activity which illustrates this is car driving. Once we are experienced drivers, we can do some driving without thinking very much; we can hold a conversation; listen to music or voices on the radio; think about our next meeting. We are driving somewhat automatically and using relatively little bandwidth compared to when learning to drive. But when a situation arises where we have to concentrate more, these secondary tasks become more difficult. If we have to concentrate on an unfamiliar route, or park in a tricky space, or a traffic situation arises, we tend to stop talking and may turn the radio off because we sense that we need more bandwidth for the driving activity. In fact, car manufacturers often engineer the car so that radio volume reduces during parking.

This will become very relevant when we look at distraction in the context of wellbeing, but it is relevant to our discussion of stress because one thing that occupies bandwidth is any major stressful situation or anxiety. When we are worried about something, that worry occupies a significant amount of bandwidth and affects concentration and performance. It is vital that we understand that bandwidth is effectively finite. Even if it turns out that we can learn to stretch it somewhat, in practical terms we are limited by the bandwidth we have at any time. This means that if a significant part of our bandwidth is occupied by something else, we cannot focus and perform at our best on the task in hand. Performance on that task suffers. This is why genuine multi-tasking is so difficult. People of all ages are vulnerable to this but there are reasons which make teenagers more likely to be vulnerable.

How do the challenges of stress affect teenagers more than others?

Biologically, stress seems to work similarly whatever one's age. There may, however, be small differences in sensitivity and adaptation in adolescence compared with adults. Some research suggests (Romeo, 2013), that hormonal stress responses may be stronger in teenagers, who may also adapt to a stressful stimulus more slowly, requiring more exposure to a particular stressor before learning to manage it with a less negative response. However, these differences are not categorical and may be small. Regardless, there are several ways in which teenagers may have more difficulty with each of the three stress problems.

Panic response:

- Teenagers have less previous experience of each stressor, so may be less able to process an event as 'something I have met before and will be able to manage'.
- They are less likely to have learnt simple strategies with which to fight the response.

Cortisol build-up:

- A school day contains many possible stressors. Students go between lessons, switching topic rapidly, and are required to perform better both in subjects they succeed in and subjects they struggle with. They are asked questions they cannot answer or criticised for imperfect work. Break times are not usually a genuine 'break', as students must socialise in a noisy environment and may be dealing with negative situations with friends and peers. (This is particularly the case for introverts, who require more breaks from noise.) There are pressures about how they look, how they speak, how many friends they have.
- There is little opportunity to relax, and adolescent free time often involves social media and screen time.

Preoccupation:

- Three mental activities use a significant amount of brain bandwidth: intrusive worrying or anxiety; processing new information; and using digital media. These are not the only high-bandwidth activities but teenagers may be trying to do all three simultaneously. When we discuss digital media and multi-tasking, this will become even more relevant.

- When preoccupied by a worry, it is very difficult to focus on work. The brain area we would use to force focus is the prefrontal cortex, which is not fully developed until well into the 20s (Morgan, 2007) so most teenagers will struggle more than adults with this.
- Teenagers typically have a great deal going on in their lives, each one occupying mental capacity.

What extra stressors do teenagers have?

There are stressors that apply more to this age group than to others. Consider how each might contribute to one of the three negative stress categories, occupy brain bandwidth and lower wellbeing.

- A perfect storm of change – everything is changing: their brains, bodies, chemistry, friends, pressures, curriculum, fears, protection from adults. Change is stressful if it is change one has not asked for or cannot control.
- Lack of control – they can control very little about their day. They may have developed 'learned helplessness', becoming so used to lacking control that they fail to notice where they could have control. They may not ask for help because they think no help is possible.
- Exams – stakes are high, with frequent demands to achieve the best, often unattainable goals.
- The internet and social media – these provide enormous benefits but come at some cost. Many costs apply equally to adults engaging in digital media, but teenagers may be more vulnerable because of extra pressures to do what friends and peers are doing and less well-developed neural control centres. Very briefly, these costs include:
  - Strong temptation to spend too much time on devices – this temptation is biological and powerful, involving dopaminergic reward pathways in the brain (Kardaris, 2017), which are activated during pleasurable experiences and addictive behaviours towards activities or substances we find pleasurable. Addictive behaviour is defined as continuing to seek pleasure despite clear negatives occurring from that pleasure.
  - More 'friends' than we can manage – the evolutionary biologist Dunbar (1997) has studied social groups of different species in relation to brain size and posits that humans can manage up to 150 'friends'. Friendships need to be maintained by certain actions and contact, and with more than around 150 we cannot do this properly. Anyone on social media typically has far more than 150 friends and contacts, and the act of trying to maintain them all – by responding with 'likes' or sympathy, for example – is stressful, exhausting and time consuming.
  - Constant comparison and goals of perfection – everyone's lives seem to be perfect, as they display their beautiful (touched-up) photos and talk about only their successes.
  - Competition for popularity – measured by how many 'likes' one's social media post has received. Each time we see that someone has liked a post or photo, we get a small rush of dopamine, that chemical responsible for the feeling of pleasure. There's evidence (Freitas, 2017) that many young people (and perhaps others, too) measure their own worth by how many likes a post or picture has received and can spend huge amounts of time checking.
  - The 'online disinhibition effect' – the theory proposed by Suler (2004) showing that most people of all ages are somewhat less careful or inhibited online than face to face. The 'toxic disinhibition' that he describes helps explain the prevalence of cyber-bullying and online 'trolling', as well as careless behaviour such as sending risky messages or pictures.
  - Some young people are dealing with difficult situations at home. They may be witnessing parental strife or unhappiness, dealing with illness or even the death of someone close to them, caring for a family member or aware of a whole range of preoccupying life problems. It is harder for adults to protect them from these things and yet they are not yet fully equipped to cope.
  - Friendships and peer pressure can be huge problems for this age group, harming wellbeing and dominating mental space.
  - Information overload, 'continuous partial attention' (Stone, 2017) and the problems of multi-tasking. These arguably affect any adults, too, and form such a large topic that we will look at them separately.

Digital media: information overload, continuous partial attention and multi-tasking

Those who use the internet and social media are reading far more than we were 20 years ago. Our screens, especially when we are online, provide many requests for attention, whether from notifications from apps or platforms, hyperlinks which we must decide whether to follow, moving images to attract attention, and text that encourages us to skim rather than to focus deeply. Many of us are in a state of what Stone (2017) calls 'continuous partial attention' – a phrase she coined in 1998, before smartphones had come to dominate. This state is likely to create a level of stress and inefficiency and, therefore, to lower performance on tasks that require focus.

We are all familiar with the experience of trying to concentrate and someone interrupting with a question or demand for attention. Most would agree that ability to concentrate is harmed, that we would perform better if left uninterrupted. When we (and this applies to all ages) work on digital media we have a situation where those interruptions and distractions are almost inevitable. Very often, communication software will be open while we are working, so notifications of emails or other messages may arrive. We can choose not to open those messages, of course, but that requires great self-control, which in turn requires significant mental energy and bandwidth. Even if we switch off our email and social media and remove our phones from sight, focusing on the document on our screen, we are distracted by hyperlinks. Each one requires a decision: to click or not. If we click, we are taken somewhere else and must adjust to the new document while somehow trying to remember the one we were reading. If we choose not to click, we expend energy in that decision, and research suggests that it takes more mental capacity to resist the temptation than to follow the link.

The message from a number of sources (Levitin, 2014; Gazzaley & Rosen, 2016) is clear: multi-tasking (with activities that require conscious mental process) is generally bad for performance and the attempt to multi-task by allowing interruptions is stressful.

Extra stress for introverts

Introverts are often particularly poorly catered for and undervalued in today's noisy, busy, social, collaborative schools and many workplaces. Yet they are estimated to make up a third to a half of all people (Bayne, 1995). To understand this, we must first understand introversion (see Cain's work (2013) for an excellent analysis). We must note that introversion is neither 'better' nor 'worse' than extroversion; they are simply two different sets of personality traits and there are advantages and disadvantages to each.

Despite popular opinion, shyness has little to do with introversion. Introversion describes an over-reaction to external stimuli, especially stimuli that include human interaction. Introverts may deal very well with strangers, have lots of friends and be adept performers. But every social situation, from a relaxed face-to-face chat with a close friend to walking into a room full of strangers or performing in front of a crowd, is mentally and physically tiring for an introverted person. An extroverted person, on the other hand, will typically feel energised by social interaction. This is partly a biological response but partly also because as an introvert it can feel as if one is using more 'brain bandwidth' when interacting with other people. Introverts may spend more effort imagining what the other people might be thinking, what other people's needs are, how the social situation is working. An extrovert might be having fun, while the introvert is processing a number of potentially alerting and stressful thoughts. They can do it but it has a cost: mental exhaustion and a feeling of being overwhelmed.

At school, many teaching methods and activities involve collaborative work. While collaboration cannot be ignored, teachers should realise that during these activities introverted students are unlikely to be doing their best work and may be more exhausted and more stressed, leading to poorer learning outcomes. When an introvert is asked to do a piece of work jointly with a neighbour, the introvert switches out of learning mode and into social mode. The last thing on his or her mind is 'How can I do as well as possible on this piece of work?'

Of course, most people have a combination of introvert and extrovert tendencies, or may feel differently in different situations or when in different mental states. But a significant number (even if a minority) of the students in any classroom will score highly on tests for introversion, and they pose specific problems and have specific needs if they are to fulfil potential at school and have good wellbeing.

The special requirements of introverts – and how to provide them:

- A school day, being noisy, busy and high pressure, and involving almost constant social interaction and expectation, is likely to be exhausting for introverted students. They need options for time out, to replenish their energy levels and reduce cortisol.
  - Ensure that your school has a place where students know they can find peace during break times. Offer time and explicit permission. When talking about this avoid terminology that suggests that students who need this are in any way more fragile than others. (This is not the same as a safe space. It is simply acknowledging that noise and social intensity are not good for some people.)
- Many students and staff have a poor understanding of introversion and may fall into the common trap of valuing introverts less highly than the social, seemingly confident extroverts. This can lead to low self-esteem for introverts and teasing by others.
  - Share understanding among students and staff of what introversion is. Of course, some staff will have introvert tendencies and this can be used to help understanding. Ensure that equal value is placed on introversion and extroversion, and that students can value the strengths that each other brings to all situations.
- Students need to learn skills to succeed in the extrovert world, including being able to stand up in front of peers and express oneself. Avoiding the things we fear is not the best way to overcome them.
  - While acknowledging that public performance may make introverted individuals more anxious and uncomfortable, teach that these skills can be learnt and that practice and familiarity make them easier. Expose students to challenging situations step by step, gently and respectfully. Encourage them to be proud of their achievements and to see the challenges as achievable and worth aiming for.
- Collaborative work is likely not to suit introverted students, but collaboration is necessary in schools and in life.
  - There are ways for teachers to manage collaborative situations to the value of all students. Cain's 2013 work (op cit) offers examples. Teachers should consider: assigning suitable team roles; allowing students to choose partners; offering choices for reporting and work sharing; sensitively facilitating turn sharing; joint presentations.
- Answering a question in public or sharing one's work with the class is likely to be very stressful for introverted students, yet this is a necessary part of schoolwork.
  - If students are aware both of the need for contribution and why it can be difficult, they can be armed with useful and often simple strategies. For example, they can prepare questions in advance, offer their contribution early in the lesson to get it over with and acknowledge pride in their achievement when they rise to the challenge.
  - Teachers can be encouraged to create an environment in which all students feel able to contribute without fear that they will be teased if they get it wrong or right. One useful idea is to tell students that no one should put their hand up for a certain amount of time after the question is asked; this gives introverts time to test their answer internally and extroverts time to think more carefully.

Strategies for schools

We see that stress can be a huge factor in teenage lives and can negatively affect their wellbeing and performance, despite its biological function being to encourage peak performance. What can and should schools do about this? How can you help students to manage stress so that it becomes genuinely performance enhancing, something that they can thrive on, not just survive with?

It is impossible to provide a complete guide to stress management in this space but the resources at the end of the chapter will guide you further. It is important also to share these with parents, so that they can reinforce the messages at home.

1. Educate about the biology of stress: what stress is; how it affects us (each somewhat differently); recognising symptoms; simple strategies to deal with each of the three categories of negative stress.

2. Ensure that no students or staff think stress is a weakness. Encourage openness and respect.
3. Reinforce the message that relaxation is not a luxury but essential for wellbeing and improves performance. Managing stress is as important a part of health and wellbeing as eating the right (and right amount of) food, having physical exercise and good quality sleep.
4. Teach instant calming strategies such as belly-breathing. This is sometimes called diaphragmatic breathing or abdominal breathing and refers to the fact that when we are stressed our breathing tends to become shallow and move to the upper chest. If we can learn to shift our breathing towards the abdomen, we immediately notice less tension and we feel better. Although it is simple, students should practise this so that it is easy to activate at moments of extreme stress or in a panic attack.
5. Provide 'time-out' every day and encourage students to build this into their own day/evening. For some, this will be a place where there is peace and quiet; for others it will be somewhere they can let off steam with physical activity.
6. Be deliberate about this time-out: when we expect a result, we are more likely to notice and experience it; so, if we take a break, do some exercise, read a book deliberately as a stress management activity, we are likely to experience greater benefit than if we were not so conscious and deliberate.
7. Provide good sleep education (see Wiseman, 2015). Understand the importance of sleep and how it is not only essential for mental and physical health and wellbeing but also for learning. Direct students to good advice about 'sleep hygiene', the term used to describe the things we should and should not do in the hour or so before sleep.
8. Emphasise the importance of a quiet, technology-free hour before bedtime.
9. Encourage daily exercise for pleasure: something each student can enjoy, whether team sport or solo exercise, energetic or not.
10. Encourage reading for pleasure. Understand and share the strong evidence (see The Reading Agency, 2015) of many benefits, including stress reduction and sleep improvement.
11. Give clear routes for students to talk to someone they trust. Keep these routes open and repeat regularly. Ensure that some staff have counselling skills and, ideally, mental health first aid training. Crucially, ensure that students understand that there is help for them.
12. Understand introversion and share that understanding among adults and students. Make sure you cater for and value introverts and extroverts equally.
13. Educate about the downsides of attempting to multi-task: worse performance and concentration, greater stress and exhaustion. Teach (and model) the importance of switching off devices when trying to concentrate. If devices are being used for a particular task, ensure that background or social media apps etc. are switched off and that only necessary software is open.
14. Model good stress management yourselves: students need to see a) that adults also have stress and b) that we deal with it proactively. Digital switch-off and making time for focused activities such as reading for pleasure are important for all ages.
15. Reinforce a message of 'active agency': the mindset that tells us that we can control a lot of our wellbeing by taking care of our diet, sleep, physical exercise and stress.

Learning to see failure as an opportunity

One consequence of moving from a performance to a learning orientation is that failure is viewed as both inevitable and desirable because it is impossible to grow as a human being without learning from failure. Humans are born with an instinct to learn from mistakes in a way that does not generate anxiety or stress. This changes if expectations are forced on young people to be successful, with performance and position counting for more than learning.

One of the purposes of the learner attributes is to encourage learners to be risk takers who have the confidence to take on new challenges and enjoy learning from mistakes. This requires learners to not be frightened to ask for support and help, and not to worry about losing face to their peers or teachers. Having intrinsic self-motivation is necessary for young people to become flexible, independent learners who are not dependent on extrinsic rewards. The resilient will have coping mechanisms to deal with failure, supported by the behaviour of individual teachers and the culture of the school.

Supportive parenting

It is very important to teach parents about the learner attributes. This helps them to understand the importance of having a learning rather than a performance orientation. This guide argues that doing this effectively will prepare young people for higher education, the workplace and life, as well as improving examination performance. For a helpful resource see the Queensland Research Digest (2014) listed in the Resources section.

According to Lahey (2013) schools need to have active strategies against over-protective parenting. He says: 'Year after year, my "best" students – the ones who are happiest and successful in their lives – are the students who were allowed to fail, held responsible for missteps, and challenged to be the best people they could be in the face of their mistakes.'

Lahey suggests teachers help by:

- creating a classroom culture where failure, setbacks and disappointment are expected and form the basis of future learning
- establishing and reinforcing an atmosphere where students are praised for demonstrating good learning habits, perseverance and grit rather than grades
- holding students to account for producing their own work. If work is not completed or it is plagiarised, there is a direct consequence
- educating parents that supporting their children through failure builds resilience and will prepare them well for success in the future.

Mindfulness

Mindfulness is increasingly becoming recognised as an effective approach that supports social and emotional learning and the development of resilience and emotional intelligence. Kabat-Zinn (1994) describes mindfulness as 'paying attention, in a particular way, on purpose, in the present moment, and non-judgmentally'.

Mindfulness practices are aimed at helping people to accept and respond skilfully to events as they happen. Adolescents who are mindful, either through temperament or training, tend to experience greater wellbeing, and mindfulness correlates positively with positive emotion, popularity and friendship extensiveness, and negatively with negative emotion and anxiety (Miners, 2008, cited in Weare, 2013).

While scientific evidence is currently limited, a number of well-conducted studies have produced promising results (see Weare, 2013). One significant project currently in progress is the MYRIAD (2015) mindfulness and resilience in adolescence study.

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Other useful books

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Other useful resources

Nicola Morgan. Extensive, excellent resources including many free downloadable materials. There are also perpetual licences for classroom resources suitable for schools worldwide, such as Stress Well for Schools, Brain Sticks and Exam Attack.
www.nicolamorgan.com

See also her presentation slides at the Cambridge Schools Conference, Kuala Lumpur, 2016:
www.cambridgeinternational.org/images/346721-teaching-brains-in-your-classroom.pdf

Positive Psychology Center, University of Pennsylvania (M. Seligman)
http://ppc.sas.upenn.edu/learn-more/readings-and-videos

YoungMinds is the UK's leading charity committed to improving the emotional wellbeing and mental health of children and young people. There are resources and publications available on the website, including on building resilience.
www.youngminds.org.uk

Parents and teachers working together to foster children's learning
A research digest from the Queensland College of Teachers, Australia. Provides interesting insights that are widely applicable. (Number 10, November 2014).
www.qct.edu.au/Publications/Periodical/QCTResearchDigest2014-10.pdf

Chapter 6: Responsibility and engagement through community awareness, service and student leadership

> “As our society has become information rich, it has become action poor… As affluence has increased, the young person's environment has become impoverished for responsible and productive action, or any action that tests and develops them… There is more in us than we know if we could be made to see it; perhaps, for the rest of our lives we will be unwilling to settle for less.”
>
> **Kurt-Hahn**, 1886-1974

Overview

This chapter considers ways that schools can broaden students' educational experiences through activities designed to nurture confidence, responsibility, compassion, wisdom, innovation and collaboration. It builds on some of the ideas considered in Chapter 5 on wellbeing and in Chapter 2 on the co-curricular programme.

Challenge education

Kurt Hahn was an influential educational thinker who inspired the development of the Round Square conference of schools, the United World Colleges, the Duke of Edinburgh's International Youth Award and the Outward Bound movement. Hahn believed that appropriate challenges beyond the classroom provided unique experiences for the development of character and compassion. Those challenges included community service, outdoor pursuits and craftsmanship. It is interesting to reflect on what Hahn would have thought of the modern global information age – the quote at the start of the chapter is from the 1960s, and even then he was expressing concern for student inactivity due to an abundance of information.

Most education in schools focuses on developing academic competencies. If the only learning contexts that students experience are classrooms, formal teaching, books and the internet then students' development of all-round practical competencies will be constrained. Challenge education supports cognitive and affective development by challenging students to use critical thinking and problem-solving skills in contexts with which they are not particularly familiar, often working in teams, with powerful emotional engagement.

Challenge education, therefore, is an excellent way of supporting the development of collaboration and leadership. In completing a service learning activity or an expedition (or many other co-curricular activities such as team sport or playing in an orchestra) success is dependent on the whole group performing well. This often requires students to act as leaders, demonstrate resilience and practise their social skills.

Vygotsky's zone of proximal development, considered in Chapter 1, is primarily used for pitching academic tasks at precisely the right level of difficulty. The same concept can be applied to challenge education. Activities that fall comfortably within a student's current capabilities will not develop new competencies. Equally, schools have a responsibility to ensure that students can grow and learn through the experience and do not feel overwhelmed by expectations or situations that are too demanding.

The extent to which a school will wish to engage with these ideas depends on its vision and educational aims. It is perfectly reasonable for a school to have the sole aim of developing academic competences. That said there is much that can be achieved by small changes in orientation and practice. Challenge education does not have to involve expeditions to the great outdoors. Community awareness and service should prioritise local environments and much can be achieved through encouraging student participation in activities offered in the local community so that the school does not have to organise everything itself.

Responsibility involves cultivating wisdom

A responsible, wise person reasons on the basis of secure emotional states and their actions are based on positive personal values. In the learner attribute of responsible, the idea of wisdom is implicit. Wise people need to be knowledgeable, creative and intelligent, but they have the capacity to apply these responsibly based on positive

values, towards the common good. They make good choices, both for themselves and those around them. As Sternberg (2009, pp. 20–21) points out:

'Wisdom is not just about maximising one's own or someone else's self-interest, but about balancing various self-interests (intrapersonal) with the interests of others (interpersonal) and of other aspects of the context in which one lives (extrapersonal), such as one's city or country or environment.'

Being knowledgeable is usually associated with academic understanding. Being wise goes beyond this to include notions of living well, making good decisions, being compassionate and caring about the community and others. The first place to start nurturing wisdom and responsibility is in the school, with the creation of a supporting learning environment and clear codes of behaviour. As always, the most important influence on students are teachers and school staff as role models. Schools must have a well-articulated and clearly understood value system across the entire community that forms the basis upon which the school functions and informs relationships both within and beyond the school.

In some cases schools market values and educational principles without sufficient attention to their implementation. Schools must attempt to put their values into action by clearly saying what they mean and meaning what they say. Beyond this it is possible to organise and create a co-curriculum that nurtures powerful learning experiences, the focus of this chapter.

Community service: service learning

The term service learning is sometimes used to describe experiential learning that occurs through meaningful, useful, structured and reflective community service. Some writers distinguish *service learning from community service*, emphasising the broad learning dimensions implied in the former including personal, social and cognitive development.

Good service learning programmes emphasise personal and community awareness as well as service. Students need to learn to understand how actions are based on personal values and to reflect on and question their own values. If learners are to grow as individuals, it is essential that they engage with their own values and do not see service as a requirement or chore. They need to spend time and effort understanding the purpose of service learning, developing a more sophisticated understanding of the individual as part of the community, developing a sense of responsibility, for themselves and others, and an appreciation of the value and rewards of giving.

At the heart of all good service learning, therefore, is reflection. Students need to think critically and creatively, individually and in groups, about service learning expectations and experiences. The intention is to equally benefit the provider and the recipient of the service. It is important for students to understand that people from different backgrounds, in particular those less privileged, will have something to teach them.

Well-planned and managed service learning and community service programmes have a number of benefits to the community and the individual. These include:

- Developing a sense of wellbeing from helping others.
- Physical and mental health benefits, particularly in older volunteers (see CNCS, 2007), but starting young will help encourage students to see this as a life-long activity. Interestingly some research seems to suggest that the motivation for doing service is a critical factor in determining the health benefits to the giver. If the motivation is altruism the benefits are stronger than if it is obligation or duty.
- Engaging students with the community increases social awareness, self-awareness and a sense of responsibility.
- Developing communication, collaboration, leadership and other intra and inter-personal skills.
- Understanding social issues relevant to their communities and developing a greater understanding of and appreciation for diversity
- Enhancing students' applications to higher education and the workplace.

Service learning should be celebrated. The form this celebration takes needs careful thought and can vary depending on the age of students. Recognising student accomplishments through badges or awards can be a good motivator, but only if the student values their participation intrinsically rather than seeing it as an obligation that is imposed on them. Schools can celebrate service learning, and other valued co-curricular learning activities, by making them a regular part of school communications and discussion. Students who do creative and valuable things need to be appreciated,

not just those who are high academic achievers. The culture of the school needs to evidence regular, sincere and widespread dialogue around service learning. The important role teachers play in modelling this through their behaviour and actions cannot be overstated.

Service learning ideally should be linked to a student's passions, personal goals and ambitions. There are plenty of opportunities for those with particular skills to apply them to service learning. IT skills can be used to develop helpful IT products or to train others. Students with aptitudes in disciplines like languages and mathematics can tutor others. Performing artists can provide entertainment and have their art inspired from activities in the community. Student leadership and entrepreneurial experience can be nurtured.

'Under the sea' mural created by students at the British School in Colombo, Sri Lanka (*case study 11*)



Case study 11:

Using art to make a difference at theBritish School in Colombo, Sri Lanka

This case study focuses on Year 6 students at the British School in Colombo and their community service project. The project was multi-phased: children painted art murals and provided donations to the Lady Ridgeway Hospital for Children, a government-funded children's hospital in central Colombo. The Lady Ridgeway Hospital is one of the largest public hospitals in Sri Lanka, and the project focused on the ward in which children receive occupational therapy.

While the main objective was to assist the hospital, children were able to develop and strengthen all five Cambridge learner attributes by gaining a deeper understanding and awareness of the needs of their community, including the experiences of those from varied socio-economic backgrounds.

Why this project?

The project was chosen as it involved children and would benefit the Year 6 students personally, as well as providing outreach to an important service in the British School's direct community. Year 6 students were chosen to participate in the project, being the most senior grade in the Junior School, and it would provide a foundation for the many community service projects and societies they are exposed to in the Senior School. The ward required a 'new look' to make it more welcoming to the young patients. It was decided that the Year 6 students would paint a variety of murals depicting child-friendly themes such as 'Under the sea' and 'A drive through the countryside'. Rather than just collecting and donating money to the hospital, it was a unique opportunity for the students to engage in a hands-on project that directly benefited the community. It was also a way for them to interact and experience a new environment but put into practice the Cambridge attributes they have been developing daily at school.

Case study 11: continued

Attributes developed

Due to the multi-faceted and extensive nature of the project, all five Cambridge attributes were built upon and strengthened over the year. When the project was first introduced to the Year 6 students, they were immediately challenged with producing ideas for fundraising money for the paint and other necessary equipment. From the outset, student responsibility was demonstrated as they had to work independently or in small groups to devise their proposals for fundraising. The first fundraising event the students held was a bake sale in which they independently designed advertising posters, and then brought and sold food to their peers with minimal parent and teacher guidance. The bake sale increased community awareness of the project and gave all Year 6 students the opportunity to speak to their peers, teachers and parents about their assignment. After raising a significant sum of money, students then responded positively by volunteering in large numbers to visit the hospital and assist in the painting.

In the next stage of the project during the hospital visits, children had to organise themselves to be ready to leave school at the end of the school day. Once inside the hospital, children demonstrated responsibility by organising the paint, moving furniture, following instruction and painting the walls carefully. In order for the project to run smoothly, students put themselves into groups, developing leadership skills such as teamwork, independence, focus and decision-making. Students were also given the opportunity to reflect, not only on the task and the benefit to the wider community, but also the skills required for undertaking painting on a foreign surface in a new, unfamiliar setting. Self-awareness and monitoring was also developed, as children had to conduct themselves maturely and not disrupt the running of the hospital.



Year 6 students: Using art to make a difference

Case study 11: continued

Student perspectives

The Lady Ridgeway project benefited student growth and development. It was a rewarding experience in which children gained satisfaction and a greater awareness of the society in which they live.

Eugene, a student who was new to the school, began fundraising by selling cake and stationery in her apartment building with the help of her family and friends. She said: 'When I was in the Lady Ridgeway Hospital, I didn't just feel the joy of painting but the happiness of helping a hospital for children. It was my first project – volunteering and helping out the hospital is one of my biggest achievements in Sri Lanka. I will never forget the experience.'

Adithi, another student who worked on the project throughout the year, said: 'I felt as though I was making an impact. To be able to paint the walls with bright, uplifting pictures and to then see the children who were there to receive therapy in the ward look curiously and happily at the improved ward was one of the most memorable and beautiful feelings. The Lady Ridgeway project was one of the best things that happened in Year 6 and the amount of work we had done made me feel proud.'

The partnership between the Lady Ridgeway Hospital and the British School in Colombo is ongoing, with current Year 6 children also contributing to the project. Students receive an enriched, broader learning experience by having the opportunity to participate in the project. By allowing students to independently fundraise and participate, with little teacher guidance, they were able to strengthen and further develop their Cambridge learner attributes.

Community awareness and service in the school

Community awareness and service must start in the school. Schools are made up of a number of communities ranging in scale from classrooms, year groups, houses or sections and school divisions to the whole school community including parents and the local community. Creating a positive learning culture, which we considered in earlier chapters, involves developing a sense of responsibility and engagement in these communities. People need to be able to relate to actions, to understand its immediate impact in relation to their own and the school's values.

Excellent service learning programmes within schools:

- Involve students in the creation and implementation of codes of behavioural expectations and codes of conduct. These are better if they accentuate the positive rather than focus on negative behaviours. The learner attributes could form the heart of a school's code by exploring how students should display confidence, responsibility, reflection, innovation and engagement. It is much more powerful for students to be expected to work on these rather than just provide pre-digested solutions and expect compliance.
- Encourage teachers to find opportunities to bring aspects of service learning and personal reflection into the subject areas they teach and other aspects of school life.
- Use qualitative forms of self-evaluation and reporting to complement traditional summative performance measures such as grades.
- Provide opportunities for student service in the school. Some of the best service projects are school based and include peer-tutoring, students being trained then acting as mediators when other students have disagreements, students working occasionally as classroom assistants for younger children, and helping staff in support roles such as maintaining the school grounds and environment.
- Involve classroom activities linking with service opportunities within or beyond the school. Examples include evaluating a local need and designing a product (physical, IT based or creative/artistic) that meets a local need.

- Provide opportunities to bring all members of the school community together and explore partnerships with parents and alumni.
- Involve students in school government through organisations such as a student council.

The characteristics of excellent outreach community service programmes

Being part of a wider community, schools can offer students learning opportunities that benefit the community, as well as students, in familiar, accessible settings. The fact that students are required to interact with people they may not know in the local community might take them outside their comfort zone, allow them to see things from a different perspective and provide more challenge than activities organised by the school. It can help students to develop sensitivity and compassion for others as they learn their personal stories and understand their circumstances.

As schools will have resources including classrooms and IT, they can offer opportunities for outreach programmes by bringing the local community into the school, as well as opportunities for students to go into the local community.

The concept of service learning can be broadened to include work placement activities where students experience and contribute to real work settings. This can help them explore future work options.

Excellent outreach community service programmes:

- Offer relevant and meaningful service in the community. Schools and partners must see that the service provided by students meets the immediate needs of those they serve or the goals of the organisation.
- Give students challenging, real service that engages them actively rather than as observers so that they feel that they are making a positive contribution and receive necessary support and appreciation from supervisors.
- Allocate enough time to have a developmental impact.
- Can involve students in developing products (for example, physical, electronic, artistic) in the school, which are then used in the community.
- Require students to apply what they have learnt in class to real-world situations and what they learn in service to activities in school. Examples might include learning from older people about their experiences, or understanding the chemistry and biology of substance abuse.

Examples of community service programmes

There are numerous opportunities for community service; a few are outlined in Table 15. Service is normally best organised over a sustained period of time. Some schools timetable a fixed amount of time for community service and other co-curricular activities, for example one afternoon a week. Other schools expect this to be completed after school hours.

Service can also be organised as an activity over a fixed short period of time. Some schools suspend the regular schedule for a period, requiring students to complete a programme. This can work well for some activities such as work placement or project-based learning that might be scheduled at appropriate times of the year that disrupt the schedule the least (for example, after examinations have finished or before the regular school year starts).

Some schools offer international service learning opportunities. A few organise service learning opportunities during school holidays or gap years after a student has graduated, before they attend university.

Table 15: Some examples of service learning and community service activities

Activity	Examples
Innovative: overcoming barriers	• Researching then designing and/or developing solutions, products or services, for example for those with disabilities, improving environmental sustainability, renewable energy • Building simple databases or IT solutions, apps that serve a community function • Raising community awareness of health/environmental issues through research and communication/presentation of findings
Creative and performance	• Student choir, drama, artistic activities in the local community • The local community is brought into the school where artistic activities such as singing, drama and art are organised • Students organise local community participation in artistic activities
Instructional	• Students lead training in IT skills for the local community, in particular older citizens who may lack basic skills, using the school IT facilities and classrooms • Students tutor other students or community groups in languages, mathematics or other subjects • Students participate as classroom assistants or assistant sports instructors
Active service	• Assisting in care homes, hospitals, schools for special needs • Assisting in an animal welfare centre
Environmental	• Environmental club in the school monitors wastage, organises recycling and suggests better environmental practices • Students are involved in local conservation work
Leadership/management	• School council, classroom representative, prefect
Work related	• Work secondments • Research projects with relevance to the workplace completed and communicated
Working through external agencies	• Organisations such as Oxfam and Habitat for Humanity (see Case study 16) can provide service opportunities
Related student-led co-curricular activities	• Model United Nations • Amnesty International

Case study 12:

Community service: Successful and sustainable projects at the British International School, Ho Chi Minh City, Vietnam

The British International School (BIS) has 2145 students representing 51 nationalities across three campuses in Ho Chi Minh City (HCMC). BIS started to develop community service projects around eight years ago and since then, the number of projects and activities has increased dramatically. This case study illustrates the important considerations when trying to make a community partnership sustainable and successful, with particular reference to involving the whole school community.

Community service at the BIS, HCMC

Community service is an integral part of life here. We have a dedicated, full-time community department which organises community projects, clubs and events across our three campuses. At BIS, HCMC, students continue to develop their skills and understanding throughout their time here. From the early years stage and all the way to the sixth form, each year group has a specific community project that teachers will endeavour to embed into the curriculum. In addition to this, a plethora of optional clubs and school events take place all year round. The community projects are not designed to just raise money; the goal is to develop students' sense of social responsibility towards other people and the environment. They learn that they can have the biggest impact on our community projects by spending their most precious resources: time and energy.

The main aim of the community projects is to create opportunities for students to develop the learner attributes outlined in our aide memoire. Similar to the Cambridge learner attributes, BIS has identified six traits: integrity, care, respect, reflection, enquiry and perseverance. We have a commitment to the holistic development of every child and we feel that the projects play a key role in nurturing global citizens ready to take on the challenges of the modern world in a considerate and caring manner.

Thien Phuoc Foster Home for Disabled Children

One of our longest running projects is with Thien Phuoc Foster Home for Disabled Children. We first became aware of Thien Phuoc in 2007, when a teacher at BIS was looking for an organisation to support. Thien Phuoc is a residential centre that provides healthcare, rehabilitation and education for children with epilepsy, cerebral palsy and Down's syndrome.

Projects with Thien Phuoc were initiated as a way for students to increase their understanding of disabilities, as well as teaching them to not shy away from people who are different. As the relationship between BIS, HCMC and Thien Phuoc grew, we found areas where students, teachers and our parent teacher group (PTG) could become more involved with sustainable, meaningful projects.



Year 12 student at Helping Hands with Thien Phuoc club (2016)

Case study 12: continued

We now have a cross-campus programme involving both primary and secondary students who spend their time with the children at Thien Phuoc, as well as long-term financial support that comes from our PTG.

Support of the whole school community

It can take years for partnerships like Thien Phuoc to become fully effective – this is why BIS created a programme that has a commitment to long-term partnerships with the community on a global, but mostly local, scale. The key to having a sustainable community project is ensuring the commitment from the whole school community – students, teachers, staff, parents and the community partner themselves.



PTG with children from Mai Tam House of Hope (2014)

Parents

BIS parents have shown a keen interest in supporting our partners financially by holding fundraising events throughout the year. This allows us to delegate this important aspect of the project to the PTG and focus on providing the students with a more profound learning experience.

Teachers/staff

Teachers always take on an essential role in the realisation of new projects and their enthusiasm and commitment are essential to its success. At BIS, teachers are encouraged to not just supervise the activities, but to facilitate them. At the beginning of each academic year, community INSET afternoons are organised to give staff first-hand experience of working with our community partners. Some staff travel off-site to visit a local partner, while the remaining staff plan and host activities for partners who visit us. These visits can highlight the difficulties of community service in international schools, such as language barriers and cultural differences. By overcoming these barriers, teachers gain a new perspective and are better prepared to support their students who will face similar challenges. Not only does the INSET set the foundation for their current community year group projects, it can also inspire teachers to run new community clubs or events at school.

Students

Students are the pioneers of a good community project. Community Clubs are a great way for students to dedicate more of their time to a community initiative that they are interested in. Enthusiastic students are encouraged to start their own student-led clubs. The carefully designed progression of year group projects that the children experience as they move through the school provide them with the platform to develop and organise their own community service activities.

Case study 12: continued

Preparation and reflection

Students are given time ahead of projects to develop their understanding of a partner, and to consider any issues or feelings they may have relating to the project. This is particularly crucial when students are exposed to new situations which may be daunting to them, such as meeting other local children with disabilities. Time is also allocated during and after a project for students to reflect not only on its success, but also their involvement in the activities and their personal growth. Reflection can be seen in the form of a written piece or a whole-class/peer-to-peer discussion. In our Year 8 project, the students gave a reflective presentation during assembly, which in turn supported their peers with their own preparation.

Summary

Setting up an activity with a local organisation and children in our school is relatively straightforward. We have ample facilities to host exciting events and a fleet of buses to transport students and staff to and from different locations. Creating a series of community projects that are meaningful to all parties is a much more complicated affair. At BIS, HCMC, we are developing a strong tradition of building relationships with our partners that benefit them in a sustainable manner. Our PTG is instrumental in planning and funding initiatives that use the amazing wealth of expertise and enthusiasm present in our parent community. Teachers understand the progression of skills that the children acquire during these projects and buy into the vision set out in our mission statement. They are led by a senior leadership team who prioritise resources and staff allocation in support of the community projects. Most importantly of all, the children who attend this school gain experiences that take them out of their comfort zones and challenge them to engage with the world purposefully, compassionately and effectively.

Case study 13:

Developing global competence – Christel House Art Project at The Perse School, Cambridge, UK

The Perse School has developed a meaningful and growing relationship with Christel House Charity schools. Christel House transforms the lives of impoverished children around the world to break the cycle of poverty. Through a combination of fortnightly enrichment programme sessions and a weekly extra-curricular lunchtime club, we have developed a variety of student cross-cultural art projects between our schools which also function as fund-raising activities.



Case study 13: continued

The initial project was a sketchbook exchange that was completed by our community art enrichment students in conjunction with students from Christel House School India and Christel House School South Africa. The 10 pupils taking part in each school, ranging from Year 11 to upper sixth, were given a sketchbook in which they worked on one of four themes: identity, family, school and recreation. The pupils were paired up with one student from each of the other two schools and worked in response to their partner's work. Once each theme was completed, the sketchbooks were posted to the next school in rotation. The exchange worked as a visual stimulus, and pupils from all three schools benefited from being inspired by their partner school's artwork, as well as developing an understanding of the cultural similarities and differences. The final work was compiled into a photo-book with copies sent to each participating school.



In Christel House Club, pupils have created a range of literacy resources, children's books and illustrated alphabets for the kindergarten pupils at Christel House School Bangalore. Pupils were encouraged to write their own children's story, illustrate it and manage their own team of illustrators. In an effort to promote the charity, pupils have run a stand at our Christmas fair to raise money by selling items from those made both in India and at the Perse. Pupils have led an assembly, produced a film, auctioned their artwork and are now currently developing a Christel House Newsletter to aid fundraising. They each have particular roles, for example, editor, photographer, proofreader. Students have interviewed Perse staff who have contributed to raising money for Christel House and some Christel House employees.



From the connection with Christel House School and the artwork they have produced together, pupils have learnt a variety of skills, time management, team building, independent thinking and problem solving – all within the context of helping others less fortunate than themselves.

Case study 13: continued

Community awareness and service – enrichment programme

Year 11 and sixth form students spend one afternoon a fortnight doing enrichment activities as part of their core curriculum. The aim is to provide something different from the experience of normal classroom lessons, enabling students to have opportunities for leadership, develop new interests, learn new life skills and challenge themselves.

Year 11 and lower sixth enrichment focuses on co-curriculum and 'self-enrichment', with practical courses and activities, academic non-examined courses, and also some non-examined subjects which pupils would not otherwise have time to do. Options include first aid, history of art, journalism, photography, TEFL and young entrepreneurs.

Upper sixth students all undertake community service, with almost all working with older people or with primary school pupils through our primary schools partnership.

We believe that we have the responsibility to play a full part in the life of the local community, and that such active participation is of equal benefit to us and to our partners. Through these links our pupils learn the importance of selfless service, develop a sense of social responsibility and acquire interpersonal skills.

Two groups work with older people. One group runs a six-week 'Digitstart' course for older people wanting to learn how to use the latest technology, from Skype to online shopping. Another works with Dementia Compass to run a choir for dementia sufferers and their carers.

Each fortnight Perse staff and students can be found working with teachers and pupils in one of 17 local primary schools with which we have a partnership. Each primary school specifies the kind of support they would like – from one-to-one maths sessions to stretch their brightest young mathematicians, and coding workshops, to helping children for whom English is a second language, teaching French or running a Latin club.

We also run a mentoring programme with two local primary schools, the Fitzwilliam Museum and the Museum of Archaeology and Anthropology. The aim of the eight-week course is to raise primary pupils' aspirations, develop skills and enhance their confidence. Created with an art history education organisation called The Bigger Picture, the programme uses history and art history to spark pupils' curiosity, with sessions also hosted by King's College and Gonville and Caius College. Working closely with education officers at the museums, Perse students run fun workshops with the Year 5 and 6 pupils, using masterpieces such as Michelangelo's Laocoon to encourage pupils to think and speak analytically. The year's sessions culminate in the primary school pupils producing a presentation and delivering it to their peers in an assembly at their school, alongside their Perse student mentors.

Student leadership

The School Council at the Perse provides a forum for all students to improve their school. It in turn is run by the Senior Council (Years 11–13), who organise half-termly meetings where each form can feed back via their form representatives. The senior members then liaise with relevant members of staff to communicate issues and ideas and request changes where appropriate. Pivotal to the success of the structure is that it is seen to achieve meaningful results – the simplest ideas are often the best and these can be implemented quickly and fed back to students via assemblies and tutorials. Senior Council Leader Emily Deane (upper sixth) explains more in the video below.



Watch the video at
https://vimeo.com/228212787

Student leadership and responsibility

Leadership is a process, not a position of authority. It has a moral purpose based on a deep sense of respect and responsibility for oneself and others. Unlike much of what students are required to do in terms of academic learning, leadership affects other people and is inherently collaborative in nature. Involvement in leadership activities can improve students' own learning as well as helping them to develop the broader competencies needed for success beyond the classroom.

Student leadership:

- starts with 'knowing yourself' and developing self-confidence, empathy, communication skills, resilience and resourcefulness
- is about virtue: making a positive difference
- requires emotional thought and engagement, intra- and inter-personal competencies as much as cognitive skills
- as a process (rather than a position of responsibility), should involve every member of the community being encouraged to lead at appropriate times through reflective leadership actions based on situational understanding
- should see those who have positions of responsibility focusing on getting the best out of the team by encouraging others to lead at appropriate times
- should be shared and distributed with collective responsibility and accountability
- should respect and encourage quiet leadership – often the most effective leaders get things done without acknowledgement or recognition
- should respect the culture and context of the school – different cultures have important protocols and conventions that need to be understood and respected
- involves students in meaningful school development activities so that they are involved in helping to get the best out of the system.

Case study 14:

Cambridge learner attributes develop confident and responsible leaders at The Heritage School, Cyprus

*By Year 12 student **Eleni Socratous***

What does student leadership mean? Some may think it is merely a concept, an idea, yet it is so much more. Being a leader means having confidence in yourself. It means learning how to apply your skills and help others work together in a way that produces the desirable outcome for the team. Cambridge learner attributes encourage intellectual curiosity, perceptiveness and self-reflection, assisting students to nurture their inner leader. My Cambridge IGCSEs provided the foundation and cultivated the necessary skills for me to develop my leadership. From personal experience I can say with certainty that The Heritage Private School instils the Cambridge learner attributes through its academic and extra-curricular activities, thus helping all of us in our school community of many different nationalities and backgrounds become well-rounded international citizens, and excellently prepared for the many opportunities that the future holds.

All the activities in which I have participated have helped to shape me as an individual, but have also created memories that I will forever cherish, and given me friends I will never forget. Having the opportunity through our school to be a part of the Cyprus Youth Parliament was perhaps one of the most enriching experiences I have ever had. This two-year service deepened my knowledge of my country's problems and the laws affecting children, and as a result I felt empowered to help those children whose voice could not be heard. Similarly, through taking part in the Model United Nations sessions in both Nicosia and The Hague, my awareness broadened from local to global issues. These events gave me the confidence to state my opinions in public, forming speeches and resolutions. Being naturally shy, giving speeches has never been my forte, but through my Cambridge IGCSEs and now Cambridge International A Level

Case study 14: continued

subjects, I developed the skills necessary to succeed in these activities. Especially through English, History and Business Studies, I enhanced my critical reading, analysis and evaluation capabilities, which not only trained me to debate effectively, but will doubtless be useful in other real-life situations.



Being a prefect absolutely requires leadership skills, and our school therefore arranges a leadership development and team building prefect training camp at the beginning of each academic year. This familiarises us with each other through team-building activities, and also helps us to realise and acknowledge the importance of our position. Being a prefect requires a great deal of team work as we are responsible for organising many school events. Organising events with my fellow prefects has been one of the most wonderful experiences during this school year. It is stressful, especially when you are head of that event: the whole school depends on you planning the event properly for it to be successful. It is time-consuming because you also need to focus on your Cambridge International A Levels. However, it is also very beneficial, in the sense that it helps you manage your time effectively; it encourages you to practise the skills you have learned, and to balance your school work and extra-curricular activities. At the same time, though, especially if you are the head of the event, you have to remember that being a leader does not only mean being in charge, it also means becoming one with your team, inspiring them and working with them to ensure that the team performs efficiently and effectively.

Additionally, through physical extra-curricular activities, The Heritage Private School captures the importance of teamwork in a broader environment. Through being a hike leader as well as taking part in The Duke of Edinburgh's International Award (DofE), I learned not just how to use a compass, but suddenly that I was responsible for 10 other students. Taking part in the DofE Award, you have to learn



Case study 14: continued

how to cooperate with others. Such activities help you to not only develop your leadership but also teach you how to communicate, collaborate and negotiate in new situations.

Cambridge learner attributes are also engaged through the Junior Achievement Programme, which focuses on organisational and innovation skills. You not only have to devise and develop a product that is original and creative enough to be saleable, but you also have to learn the basic procedures of running a business. Being the finance manager of our candle company, Wicked Wonders, helped me immensely in acquiring an insider's view of how a business functions, and in particular the work of an accountant. I discovered how difficult the job of an accountant can be, which gave me a new respect for this role. The Junior Achievement Programme was another remarkable experience, and I was very thankful for this unique opportunity. It enabled me to apply the theory from my Business Studies syllabus by participating in a real scenario. It also gave all of us a better insight into future careers that we might be interested in pursuing.

Overall, I am very pleased that through the ethos, curriculum and wider activities offered by my school, and based on the Cambridge learner attributes, I have not only improved my leadership skills but have grown and matured more as a person. I believe this is of central importance, because an individual who has access to support and guidance in developing independence will be better equipped to set goals and know how to achieve them. In essence, the Cambridge syllabuses and the Cambridge learner attributes activate all of the attributes necessary to make the best future global leaders.

Case study 15:

Encouraging student leadership, innovative learning and community awareness at First Steps School, Pakistan

First Steps School of Arts and Sciences is a small private school in Faisalabad, Pakistan. The focus of the case study is children aged 13–14 in the 8th and 9th Grades because they are the most senior students and have assumed leadership positions in the school.

Initially, it is important to organise a structure. First Steps initiated a student council, with the purpose of asking students to assume responsibility for some administrative tasks. The students were divided into four houses, and each was assigned a house captain (captains were shortlisted based on an interview with the principal, after which an election was conducted in school where students voted).

These captains are responsible for marking attendance, guiding the younger children in extra-curricular activities such as sports day, and in helping to monitor children during break time. This student government has proved to be very successful, with the children automatically assuming a new level of maturity and leadership. They are diligent in their duties and take pride in the role that has been assigned to them. This has led to a marked improvement in their academic performance as well, due to the increase in confidence and because their ability to keep their leadership position depends on maintaining their grades. These leadership positions are not limited to students with exceptional academic ability. There are roles assigned to those who excel in sports for example, such as sports captain. By assigning this role to those who are known for their athletic ability, we aim to instil in them confidence and pride, which will translate to their academic work as well.

Morning assemblies are a great tool for fostering a sense of unity among students. Each week, a different class is responsible for the morning assembly, in

Case study 15: continued

which they can perform a play, read a dialogue or have a discussion about important events taking place around the world. The aim is to help the students to make connections with people around the world, and to foster awareness about global phenomena. By exposing our younger students to information like this on a daily basis, we set the foundation for the Cambridge Global Perspectives course, which is mandatory for our Grade 9 students. These assemblies can be instituted in a school of any size, and it is most important that the teachers take part. For example, on Earth Day, which is new and unfamiliar in Pakistan, a teacher prepares a presentation about the topic and helps to educate the students on how it is celebrated around the world.

Morning assemblies are also a great forum to raise community awareness. A large part of the mission statement at First Steps is to educate students on becoming better citizens and to assume a role in the betterment of their community. We held a fundraising drive for the Shaukat Khanum Cancer Hospital in Lahore, and the morning assembly was used to encourage students to participate and to give them a running total of the amount we had raised. This drive was extremely successful, and ended with First Steps raising the second highest amount in the whole country for the hospital. Another activity we have implemented is the '100th day of school' celebration. Every year, to commemorate the 100th day of school, we ask students to bring in 100 snacks, such as candies or cookies. They are packaged and donated to the children's hospital. These activities help the students reflect upon their role in the community.

As a Cambridge school, it is vital that we introduce innovative learning across the curriculum to make students reflective learners. In English for example, simply reading a poem to the class will offer them a single perspective. The use of videos exposes the students to various renditions of the same poem. This activity has been very successful, as students love watching the readings of the poem, and learn to the see the same text with different perspectives. In the sciences, First Steps organises a science expo every year, where the entire student body participates by conducting experiments and presenting their projects at a large fair. The projects are studied by judges, and the students have to present their experiment to them. This expo allows them to see practical implementation of scientific theories and increases confidence.

Innovative learning is also challenging, as it forces students to step outside their comfort zone and experience new ideas and techniques. First Steps takes part in numerous competitions, like the national DAWN Spelling Bee and the International Kangaroo Math Competition. These have proven to be great tools in motivating the students to improve their personal results, as well as how they compare to international students. Many of our students have earned top positions in their city and country due to their hard work and the encouragement the school administration offers in preparing them for this competition. Our students also participated in the Oxford Big Read competition, and our students went on to win the regional competition. The Big Read competition happened in three phases, the first of which was to get the students to select books from their reading level and write reviews. The students with the best reviews were shortlisted and trained by the teachers and their reviews were then sent to the competition, where they received accolades. This is an innovative way to encourage reading, develop writing skills and help students reflect on how they can improve their comprehension and understanding of reading material.

By encouraging student leadership, innovative learning and community awareness, First Steps aims to produce reflective learners. These learners have the confidence to evaluate their peers (in peer evaluations conducted in class), and to evaluate their own improvement and growth. By introducing them to the concepts of community service and challenges, we hope to make them responsible for the role they play in school, in the community and in their own personal growth.

Case study 16:

The cultivation of the Confucian leader: Leadership and service in action at Confucius International School, Qingdao, China (CISQD)

Continued from Case study 7 in Chapter 2

A leader's primary purpose is to serve the people. Confucius highlighted the duties of a leader by explaining the proper way to think, act and make decisions in government positions. Most importantly, Confucius taught extensively on virtue and why leaders must be virtuous. Developing leadership potential is a gradual process that requires discipline, education and natural talent.

For the purposes of this case study, we will focus on the Confucian concepts of Li, Jen and Chun-Tzu.

The term Li has several meanings, often translated as propriety, reverence, courtesy, ritual or the ideal standard of conduct. It is what Confucius believed to be the ideal standard of religious, moral and social conduct. The second key concept is the principle of Jen. It is the fundamental virtue of Confucian teaching. Jen is the virtue of goodness and benevolence. It is expressed through recognition of value and concern for others, no matter their rank or class. In the Analects, Confucius summarises the principle of Jen in this statement, often called the silver rule: 'Do not do to others what you would not like them to do to you' (Analects 15:23). Li provides the structure for social interaction. Jen makes it a moral system. The concept is Chun-Tzu, the idea of the true gentleman. It is the man who lives according to the highest ethical standards.

CISQD strives to create an atmosphere that will nurture and empower leadership and active, caring citizens within the student body, rooted in the Confucian principles of Li, Jen and Chun-Tzu. The school has in place a number of systems that facilitate both formal and informal leadership. To be eligible for and to maintain one's position, all leaders must be of good academic and behavioural standing in the school community.

The school prefect

CISQD school prefects have an essential role in the day-to-day running of the school. Although they are perhaps most visible in the school, their other duties, particularly in the boarding house, are also very important. They must be able to command the respect of pupils, including their peers, and to exercise their authority in a responsible manner. School prefects are nominated by the faculty and current prefect body, and subsequently appointed by the headmaster.

Student council executives

The CISQD student council is comprised of student leaders elected by their peers to participate in designated areas of school government. Essentially, the student council serves as the voice of the student body. They participate with the school leadership, student welfare department and marketing department in the planning of school events throughout the academic year, inter-school events and events within the local community. The student council executive brings ideas, requests and feedback to the meetings, and a democratic process is used to give students a voice and make decisions in creating a year-long programme of activities. Students who participate in student councils, under the supervision of a teacher or administrator, learn about the democratic process, civic responsibility, leadership, problem solving and teamwork.

Tutor group representation

Every tutor group in the school is required to elect a tutor group representative. This individual serves as the tutor group representative on the student council, representing the tutor group at the weekly meeting of the student council, bringing the concerns of the tutor group to the full council and disseminating information, feedback and updates from the student council directly to the tutor group. This role

Case study 16: continued

enables even the youngest and newest members of the school community to assume a position of leadership and to begin the realisation of their leadership potential.

CISQD house system

The school is divided into sub-units called 'houses'. Each student is allocated to one house when they enrol. Houses may compete with one another at sports and in other ways, providing a focus for group loyalty, house spirit and a healthy atmosphere of inter-house competition and honour. The pinnacle of the house system is the awarding of the annual house trophy for the house that has secured the greatest number of house points in an academic year. House points may be awarded by all faculty and staff to students for a variety of reasons: exemplary well-mannered behaviour; demonstrating an exceptionally caring attitude towards peers; producing work of an exceptional quality; excellence in academic performance; acts of service to the school community; public performances; representing the school in competitions and events and situations.

Confucian ceremonies at Qu'fu, the birthplace of Confucius

Every year, all lower sixth students participate in a ceremony to honour and pay respect to Confucius in the city of his birth. This ceremony has very strong cultural and spiritual significance and is traditionally led by the founder of CIS, Mr Kong, board members, the headmaster and members of the senior leadership team. It is part of the school's graduation requirements.

Local and international community service programme

As part of our commitment as global citizens, CISQD students engage in a wide range of local and international community service initiatives. Locally, CISQD has entered into partnership with the Chinese Red Cross to form the Rose Alliance Charity to support local charities. Students actively engage in fundraising and in the activities of the respective charities. Internationally, CISQD students have participated in house builds with Habitat for Humanity in Cambodia and Anchorage, Alaska. Indeed, CISQD students were the first Chinese nationals to participate in a global house build with Habitat for Humanity in the USA. In collaboration with our sister school in Chengdu (CISCD), CISQD students participate in the annual Christmas community service project in Northern Thailand, where students participate in educational and construction initiatives with the descendants of the Free Chinese Brigade, Chinese nationals who fought alongside the Allies against the Japanese in Northern Thailand from 1942–1945, only to be abandoned as stateless people.





Habitat for Humanity community service

Hengdien film production

Each year, all newly enrolled students participate in two film production projects at China's Hengdien studios. In the semester prior to the actual film production, in collaboration with the English, performing arts and marketing departments,

Case study 16: continued

students engage in all aspects of preparation of the actual film production, including script preparation, auditions, casting, direction and rehearsal. Throughout the production and filming process, students play very significant leadership roles in the direction of the movie, supported by film production professionals from the Hengdien studios.

Model United Nations

Model United Nations, also known as Model UN or MUN, is an extra-curricular activity in which students typically roleplay delegates to the United Nations and simulate UN committees. Participation in this demanding club fosters and facilitates the development of more effective leadership skills, greater global awareness, enhanced public speaking skills, more developed time-management skills and the opportunity to exchange and interact with peers from all around the world.

National Debate League

In recent years the school's debating teams have dominated the National Debate League for the eastern seaboard of China. In recent years, school teams have secured first and second places, in addition to best public speaker at two of the last three annual debate competitions for the eastern seaboard. These teams have then progressed to represent the eastern seaboard in the National Debate League.

Extra-curricular activities programme

The school operates an extra-curricular activities (ECA) programme comprising of our 50 clubs and activities. Each faculty member is required to actively support and engage in two weekly ECAs. In each of these ECAs students serve in leadership roles at club level, collaborating with the respective teachers in the weekly functioning of the club or activity. Each ECA is required to reflect one of the Confucian Six Arts.

School sports

As part of the school's commitment to the provision of as wide and diverse leadership opportunities as possible, as well as our commitment to the formation of well-rounded individuals, the school engages in a wide range of athletic competitions and tournaments. It is very much part of our 'work hard, play hard' school culture and this is evident in the fact that some of our most active student leaders also serve as school ambassadors on our respective sports teams.

Student exchange programme

CISQD students have the opportunity to apply for participation in the CISQD student exchange programme which allows them to live in one of our sister schools in the UK or with Loughborough Grammar School, one of our student exchange partners.

CISQD student ambassadors and facilitators

Every year, student leaders assist the school in hosting a number of large public events, the majority of which attract schools and student participants from all parts of mainland China. Included in these are:

- The National ASDAN Business Simulation Competition. Coordinated by ASDAN UK, this annual business simulation attracts a great deal of interest from international and Chinese schools alike and has proved to be a highly competitive and rigorous tests of student leadership and business acumen.
- The British Council University Tour. For the past four years, CISQD has been the British Council's venue of choice for its university tours in the Shandong Province, thanks to the reputation secured by those students who have acted as hosts, facilitators and translators at such events since 2013.

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Contacts and resources

Duke of Edinburgh's International Award:
http://www.intaward.org

The Award was created in 1956 by HRH The Duke of Edinburgh and Kurt Hahn, for young people in the UK. By 1971 the Award was operating in 31 countries and today it is delivered in over 140 countries. The Award is open to any young person between the ages of 14 and 24, and aims to equip 'young people for life regardless of their background, culture, physical ability, skills and interests. Doing the award is a personal challenge… it pushes young people to their personal limits and recognises their achievements.'

There are three levels to the Award – bronze, silver and gold – and each level has four sections (service, skills, physical recreation and adventurous journey). In order to get the gold award, the young person has to also complete a residential project.

The Award has a positive impact on the lives on young people in a number of ways including improved health and wellbeing, educational attainment and social inclusion. The award is widely internationally recognised as evidence that a student has completed an excellent co-curricular programme that will have challenged them and nurtured the development of desirable character traits and qualities.

Genesis Debate Programmes:
www.genesisdebateprogrammes.com

Genesis Debate Programmes (GDP) empowers teachers from across the curriculum to use debating in their classroom, and provides opportunities for students to learn how to debate through their innovative debating programmes. These range from week-long summer schools, to weekend or three-day debating festival workshops.

Genesis programmes provide opportunities for students to become independent, thoughtful learners who communicate well with each other, engage in the curriculum and with the world around them in a meaningful way. The GDP methodology, led by top university students, recent graduates and qualified teachers, teaches communication in an innovative, engaging and enjoyable way that supports the development of skills and competencies needed to flourish in the modern global world. It also provides a highly enjoyable way to develop spoken English. Genesis contact: **info@genesisdebateprogrammes.com**

Habitat for Humanity:
www.habitat.org

Habitat for Humanity is an organisation that provides housing for people in need. Founded by Millard and Linda Fuller, its vision is to 'put God's love into action by bringing people together to build homes, communities and hope'. Habitat for Humanity has built or repaired over 800 000 homes and served more than 4 million people worldwide since its creation in 1976. Their vision is 'a world where everyone has a decent place to live', and they achieve this by constructing new homes and regenerating neighbourhoods. It is active in about 70 countries and there are many ways to volunteer with the organisation.

Model United Nations (MUN):
www.una.org.uk/get-involved/learn-and-teach/model-un-portal

Provides an opportunity for students to develop negotiation, diplomacy, leadership and critical thinking skills. MUN originated in the USA and the model has spread worldwide with conferences held in many countries. Students take on the role of a delegate at a simulated UN committee and each represents a national government. The delegates then negotiate a particular issue, having researched it first.

Oxfam:
www.oxfam.org

Oxfam is a coalition of 19 organisations working together in over 90 different countries. Their primary focus is on fighting poverty – both the cause and the impact. There are many ways to support the work of Oxfam including campaigning, volunteering and fundraising through initiatives such as Trailwalker.

Chapter 7: Developing the Cambridge learner attributes through Cambridge Global Perspectives and Enterprise

> “It is widely recognised that we live in an increasingly digitised and interconnected world. The means by which we access information and the pace with which this takes place are profoundly changing the way we learn, communicate and work. Increasingly, young people are faced with access to a multiplicity of competing ideas. In such an information-rich society, young people need the skills and dispositions to be able to think critically..”
>
> **Extract from Cambridge International A Level Global Perspectives syllabus** 2017–19

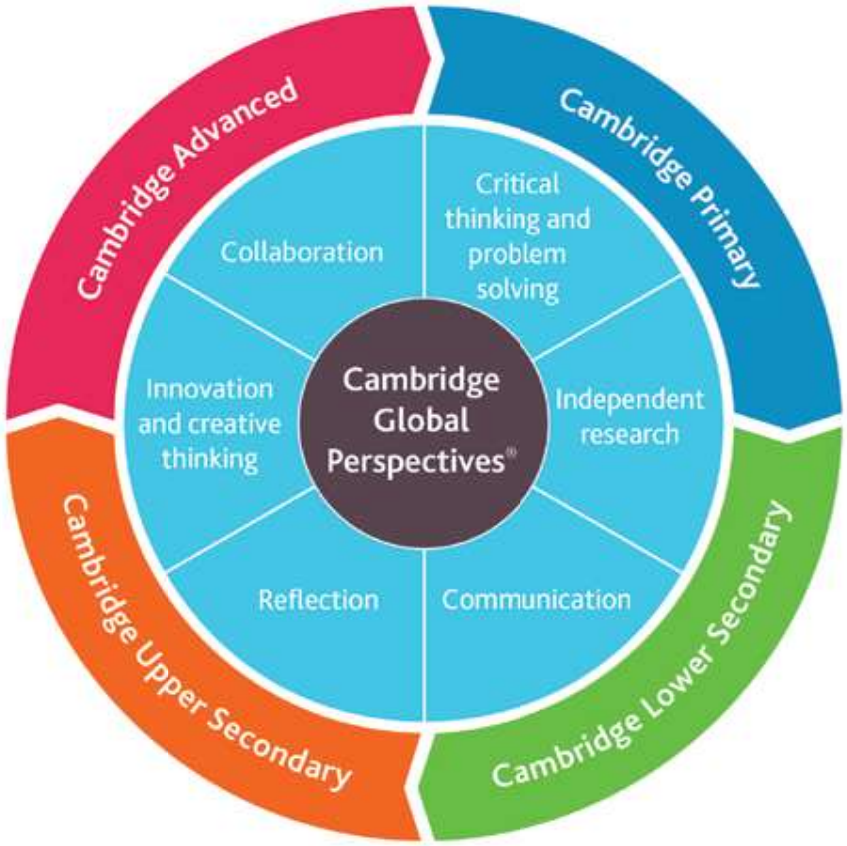
Overview

This guide has argued throughout that the learner attributes need to be at the heart of approaches to teaching and learning in all disciplines and activities the school provides. This chapter focuses on two programmes that Cambridge offers that complement a discipline-focused curriculum. They are specifically designed to support habits and skills development associated with preparing students for the modern global information age and the world of work.

Cambridge Global Perspectives

Cambridge Global Perspectives is an interdisciplinary programme, currently offered through Cambridge IGCSE , Cambridge International AS & A Level and Cambridge Pre-U syllabuses. It focuses on the nature of argument and evidence, develops research and information literacy skills and encourages understanding and respect for the perspectives of others. Global Perspectives will become available for Primary and Lower Secondary (5–14 year olds) for first teaching from June 2018.

Students learn to appreciate alternative perspectives on global issues where ideas and interests compete and there are no easy answers. They learn how to evaluate arguments, in particular the evidence and reasoning used to support them, as well as improve the quality of their own arguments.



Through studying a variety of authentic and significant case studies students become better informed about the world and better able to make informed and sensitive judgements. The course develops the skills of flexible, reflective, creative and critical thinking, and students learn how to research issues and arrive at well-reasoned and evidenced conclusions. They also learn to work collaboratively with others and effectively communicate and critique ideas so that they become, in support of the Cambridge learner profile, more confident, responsible, reflective, innovative and engaged.

Specifically Cambridge Global Perspectives aims to develop learners who:

- understand the nature of evidence in a variety of forms and effectively evaluate evidence in deciding what conclusions can be reasonably reached
- can support their own arguments with sound reasoning and the appropriate use of evidence
- enquire into and reflect on issues both independently and in collaboration with others from a variety of cultures, communities and countries
- generate and express clearly in written and spoken forms their own well-reasoned arguments
- use disciplined and scholarly research skills to investigate issues of global significance
- consider issues from personal, local, national and global perspectives, and analyse the links between them
- communicate sensitively with people from a variety of backgrounds, empathising with the needs and rights of others
- can transfer their thinking and planning skills to unfamiliar contexts
- develop a sense of their own responsibility as active citizens.



For a video introduction to Cambridge Global Perspectives, go to **www.cambridgeinternational.org/globalperspectives**

Watch a higher education perspective on Global Perspectives at Cambridge International A Level and Cambridge Pre-U by Stuart Schmill, the Dean of Admissions at the Massachusetts Institute of Technology in the US at: **www.youtube.com/watch?v=CPxRtu7Ed_M&index=53&list=PLi4xGU_d7k_J-9Oi8Z56q7wNf_RXDGBwP**

Case study 17:

Cambridge Global Perspectives at Suffern School, New York, USA

Two students and two teachers from Suffern High School, New York, reflect on how they find Cambridge Global Perspectives valuable in the videos below:

Hannah Conciglio - the importance of lifelong learning; Global Perspectives for international perspectives



Watch the video at **https://vimeo.com/232474032**

Alex Fernandez - skills gained from Global Perspectives



Watch the video at **https://vimeo.com/232473739**

Jarrod Gelb - collaboration peer review



Watch the video at **https://vimeo.com/232474113**

Bob Wilson - the importance of challenging students



Watch the video at **https://vimeo.com/232473942**

How critical thinking, information literacy, reflection and research are supported and assessed through Cambridge Global Perspectives

The Cambridge Global Perspectives curriculum continuum is based on a developmental spiral of learning. At all stages, students are required to critically engage with information and source material to improve their information literacy (in developmentally appropriate ways reflected in course standards, activities and requirements). At all levels students are required to complete research and to communicate their ideas both in writing and through spoken presentations.

Schools have the opportunity to make Cambridge Global Perspectives a core curriculum activity so that learning that takes place across the curriculum in other subjects is linked to Global Perspectives themes. This reinforces students' ability to make connections between all the disciplines they are learning, reinforces learning and helps students transfer skills and understandings from one context to the next. Alternatively schools can choose to teach Global Perspectives as a discrete subject.

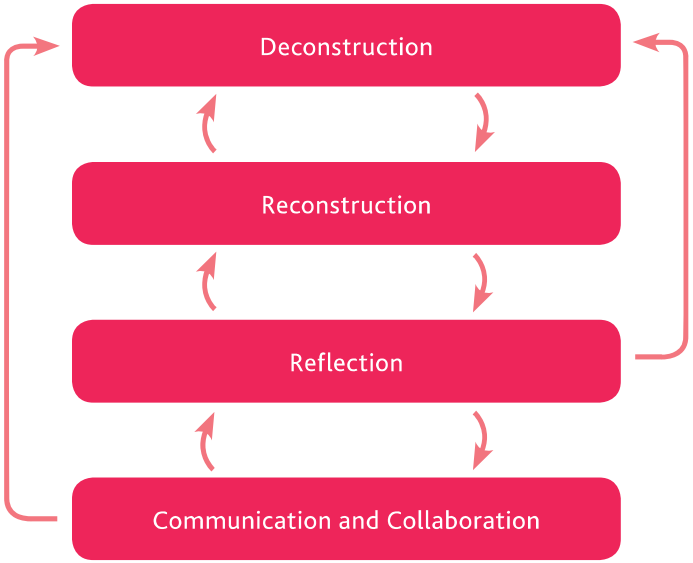
A web-based learning platform is available for all schools who register for the programme. This Online Learning Area has extensive materials specifically for Global Perspectives and is freely available to all Cambridge centres delivering or considering delivering Global Perspectives. The Online Learning Area provides online structured courses, with guidance for both students and teachers, and multimedia resources, together with teaching and learning activities. Secure personal journals encourage higher level thinking among students as they engage with and reflect on the materials and activities. Spaces with forum discussions allow for collaboration between schools, in topic-based groups and within students' own class groups. Teachers and learners can also collaborate with other Global Perspectives teachers elsewhere in the world. Students can use ePortfolio tools to gather together and share their research, and gain feedback from peers and teachers.

Teachers and students can access the Online Learning Area using any connected device, including tablets, laptops and desktop machines. We suggest that teachers request student accounts, thereby providing students with access outside the traditional classroom environment.

The Cambridge IGCSE requires students to collaborate in groups to agree an aim and then to plan, research and produce a shared outcome. Students are assessed collectively on how well they collaborate and how well their outcome communicates their research. They are also assessed individually on a reflective paper they produce which analyses and evaluates the project and reflects upon the process of collaboration and their own contribution to the project. The video available at **www.youtube.com/watch?v=YB7qD-w4vVw** demonstrates one example of a collaborative project completed by a group of Cambridge IGCSE students at the Singapore International School in Hong Kong.

Figure 8 gives an overview of the critical path methodology that forms the core of the Cambridge International AS Level, A Level and Pre-U programmes. Standards and expectations at this stage are high, reflecting the qualification standard, but the general

Figure 8: The critical path in Cambridge Global Perspectives



approach is the same at lower levels so that this represents a natural progression. Clearly developing the habits, skills and understanding needed to perform the critical path well provides an excellent preparation for students engaging with ideas in other subjects and preparing them for higher education and the workplace.

The learner attribute of reflection is at the heart of the programme. Students are required through assessment objective 2 (reflection) to:

- research and consider alternative perspectives objectively and with empathy
- consider the ways in which personal standpoints may have been affected by the research process
- evaluate the impact of alternative perspectives and conclusions on personal standpoints
- identify the need for further research in light of the research findings
- reflect on the scope, nature and limitations of their own research report (Cambridge International A Level only).

Students who want to take Global Perspectives to a full Cambridge International A Level or Pre-U standard will complete a research report as the Cambridge International A2 Level component of the Cambridge International A Level. You can download a comprehensive guide for learners at **www.cie.org.uk/images/385159-a-learner-s-guide-to-the-cambridge-research-report.pdf**

Read an example of a completed student project at: **www.cambridgeinternational.org/images/413316-example-candidate-responses.pdf**. This report, called *To what extent does globalization contribute to higher unemployment?*, considers a global problem taking an interdisciplinary approach, including economic, social and political viewpoints.

Case study 18:

Linking the World's Largest Lesson with Cambridge Global Perspectives at the Southland Girls' School, Invercargill, New Zealand

The World's Largest Lesson launched in September 2015, when world leaders committed to the 17 goals for sustainable development (read about them at **worldslargestlesson.globalgoals.org**).

Connecting our Global Perspectives learning with the global goals through the World's Largest Lesson has allowed us to focus on the learner attributes in a real-life context, with a particular focus for this case study on confident, responsible, reflective, innovative and engaged learners.

Our Global Perspectives class is a Year 9/10 class in our Year 7–10 Global Minds programme at Southland Girls' High School. In 2015 our lesson was selected as one of eight worldwide to help launch the World's Largest Lesson. The focus of our submitted lesson was building a link between the Millennium Development Goals and the new Sustainable Development Goals. The World's Largest Lesson has a growing resource base to help support learning across all year levels and contexts. The global goals have become embedded in our Global Minds course.

We use the goals to link our local actions to global targets, giving learning deep relevance and a sense of purpose. We start with considering the global goals to help us to understand the issue at hand, then transfer our new learning into our Global Perspectives group and individual projects. This has allowed us to consolidate, challenge and extend our students' conceptual understanding. Connecting learning in class to the global goals, students are encouraged through collaborative learning tasks to reflect on how their understanding has changed and discuss what has affected the change.

We have inSiGHtS (SGHS being an abbreviation for Southland Girls' High School) groups so students are in responsive social contexts to deepen their

Case study 18: continued

global competency skills. The Cambridge Global Perspectives skills are the scaffold we use to structure these sessions to deepen understanding of global issues. We



plan open-ended discussions around, for example, the global goals Twitter feed. We challenge students' understanding, encouraging them to act on issues of global significance. We do this using tools such as global thinking routines from the Visible Thinking project at Harvard Project Zero, and reflection prompts that draw on the solo taxonomy.

Students then reflect on themselves as learners and plan next steps to transfer new understanding into their Cambridge tasks.

Collaborating with schools through the World's Largest Lesson network allows our students to form creative ideas based on wider perspectives. Students appreciate and understand the cultural complexity in communicating with others and evaluating whether their innovative ideas will be successful across different groups and local, national and global contexts.

Students are engaged because they are motivated by the collective impact of their ideas. In addition, their personal passion for issues is given a real-life context. A strong focus and reason for connecting to this initiative has been the focus on using our personal gifts and talents to make a positive difference in our world, both now and in the future. We actively discuss that the skills we are developing are about equipping us to be leaders prepared to connect and align future decisions to achieving the global goals. Although students may be working on their independent research study they are at all stages connecting to a global community. This allows them to dig deeper into key concepts and evaluate possible scenarios. Our class has created a wiki site (**stepup2sdg.wikispaces.com**) to share learning with other New Zealand schools because they have become so engaged and passionate about students using their learning to make a difference, and they see the power of going one step further and aligning outcomes of their inquiries to targeted collective actions.

Case study 18: continued

Using technology to open up creative possibilities to share new learning has also been a focus of our learning. Students enjoy sharing new understanding and what it means to them in creative ways. Technology also allows us to share learning with a wider audience, building a community of learners.

Through being part of the World's Largest Lesson and aligning the global goals to our Global Perspectives syllabus we have strengthened the attributes of being a confident and responsible learner. Through the real-life, real-time resources students are emotionally connected to issues of global significance. This learning means actions planned for service and raising awareness are informed and targeted.

Through increased opportunities for cross-cultural collaboration enhanced by a shared language of the global goals our students have a more authentic appreciation of how their actions will affect others.

Sharing our learning via our class Twitter account (@GlobalMindsSGHS) also allows students to gather real-time feedback, which enhances motivation further.

As a way to reflect on our learning and set new challenges for the following year we hold a Year 7–10 World Café. This allows the students in an informal environment to share changes in understanding, make connections between each other's learning and provide new insights for future learning.

All these learning opportunities have uncovered the importance of a combination of values, dispositions, attitudes, knowledge and skills that have an impact on global competency learning. Understanding learning as a lifelong disposition and building the capacity to be a leader of change has allowed all our students to experience success in a personal context relevant to them and their learning goals within Cambridge and beyond.

Video link:
www.youtube.com/watch?v=7hddEzzgyx8&feature=youtu.be



The Cambridge Primary and Lower Secondary Global Perspectives programme (piloted 2016–18, launched for first teaching in June 2018)

This programme will be added to our offering of English, English as a Second Language, Maths and Science in the Cambridge Primary and Lower Secondary curriculum. Global Perspectives will provide a carefully structured enquiry-based approach to learning that will complement and be supported by the development of knowledge, literacies and learning habits in the other subject areas. The programme will:

- Involve six Challenges a year, two a term. Each Challenge is six hours long, subdivided into a range of activities. The Challenges are designed to be used in one-hour blocks with flexibility as to how they are scheduled. There are 24 topics to choose from, at Primary and Lower Secondary.
- Build and develop, through iteration, the skills, knowledge and habits defined by the Global Perspectives continuum.
- Be taught through a wide range of topics using a personal, local and global perspective. The teacher helps the learner to look at a range of topical global issues that give a range of contexts.
- Involve challenges that will include activities such as projects, presentations, reports, logs, posters, questionnaires, written work and blogs that are both team based and individual. The challenges support five skills strands: research, evaluation, analysis, reflection, collaboration and communication.
- Be delivered digitally through our Online Learning Area. All the Challenges are located in the Online Learning Area, with support provided for a student's ePortfolio and Reflective Logs. In addition areas for collaboration and communication will be available in accordance with our age-appropriate eSafety policy.
- Be assessed: all Challenges are self, peer and teacher internally assessed, to help teachers in the formative assessment of their learners. There are also teacher-assessed Cambridge-moderated Checkpoint assessments at age 11 and 14 which are available twice a year, and graded Gold, Silver or Bronze.

Case study 19:

Cambridge Primary Global Perspectives pilot, Escuela y Liceo Elbio Fernández, Uruguay

(extract adapted from the Pilot Forum)

We chose to work with the theme 'helping people to belong' because we thought it would be very useful for our group of learners. This project would help make our students reflect on the concept of 'belonging to a group'. We implemented it in Grade 4, in classes of approximately 25 students. We are part of a very big school in Montevideo, so we thought that this topic could be especially meaningful for our context.

While doing this challenge, students had to think hard about several questions: Why is it important to belong to a group? What is belonging? These reflections generated a warm, meaningful and memorable environment where students expressed thoughtful ideas.

My students were able to show development of their communication skills, strengthening their personal strategies through interviews and surveys. They had to talk among themselves and formulate questions to later ask to other members from other teams or their own families and friends to identify different groups, find out specific information and collect data. They also listened to other groups' findings. They discussed, compared and shared data. They wrote in copybooks, on the whiteboard and designed new mind maps.

They made descriptions, improving their writing skills. They read them aloud, introducing their families and friends, with real pictures and photos. They enjoyed the learning process, making learning easier. When they relate content provided by the teacher with their real lives and personal experiences, learning becomes fun and natural. Students were exposed to memorable and meaningful activities, where they felt engaged and motivated to continue researching, improving their understanding and learning successfully. Students were always asked to self-assess their learning process, as well as the experience in general, and they were given the chance to suggest new ideas and possibilities to improve the project. We had a wonderful experience with this challenge.

Cambridge Enterprise

Cambridge Enterprise is offered as a Cambridge IGCSE and Cambridge O Level syllabus at Cambridge Upper Secondary level. It encourages candidates to develop their understanding and the practical skills associated with the work environment and the running of a small enterprise. The syllabus provides the basic knowledge an entrepreneur requires and an opportunity for candidates to apply this knowledge in a practical and engaging way when running their own enterprise project or activity. We encourage candidates to study enterprise in a local as well as a global context, while enhancing their skills of investigation, analysis, interpretation, evaluation and practical problem-solving.

The aims of Cambridge Enterprise are to:

- make effective use of relevant terms, concepts and methods when discussing enterprise and enterprising behaviour
- develop an understanding of what it means to be enterprising, and the skills that requires
- develop the ability to work in an enterprising and independent manner
- develop and apply knowledge, understanding and skills to contemporary enterprising issues, in a range of local, national and global contexts
- appreciate the roles and perspectives of a range of other people and organisations involved in enterprise, and the importance of ethical considerations
- investigate the world of work and entrepreneurial organisations
- develop the ability to communicate effectively, in a variety of situations, using a range of appropriate techniques.

One of the key aspects of Enterprise, which is assessed by Cambridge through a portfolio submitted by each candidate, is the planning, implementation and evaluation of an enterprise activity (see Case study 20).

Candidates should carry out their own enterprise project or activity, either on their own or as a member of a group (usually of no more than six candidates). Candidates working on their own will take sole responsibility for carrying out a small, relatively simple project or activity. Candidates working in groups should carry out a larger, more complex project or activity that allows each person to play a separate, defined role. Candidates may work as part of a group when planning and running their activity but the work they present for assessment must be completed individually.

Case study 20:

Enterprise at Chisipite Senior School, Zimbabwe

Watch the video at:
https://vimeo.com/230900327

Why does Chisipite Senior School teach Cambridge IGCSE Enterprise?

The school sees Cambridge IGCSE Enterprise as having a real benefit for the vocational studies which the students undertake in Sixth Form. The curriculum offers the students the opportunity to develop business skills and knowledge and also develops their life skills, encouraging them to work as part of a team and communicate with their peers and also with wider groups. The school also thinks that the syllabus encourages the students in their thinking skills and problem-solving approaches as they have to consider what will and won't work in the ideas and proposal that they are considering. The students especially enjoy running and participating in business meetings and seeing the final results of the activities they have undertaken.



Case study 20: continued

How does Chisipite Senior School teach Cambridge IGCSE Enterprise?

Students currently take Cambridge IGCSE Enterprise in a year, with six hours of teaching each week. They also undertake activities outside the classroom as part of their coursework. The subject is taken by vocational students in the Lower Sixth Form who have just completed Cambridge IGCSEs. The girls then progress to Cambridge International AS Level Business Studies in their Upper Sixth year.

The girls begin the course by researching a local business person to gain a first-hand insight into the unique challenges faced by entrepreneurs in Zimbabwe. Each pupil prepares a business plan which is presented to the head teacher. This presentation is followed by a verbal question and answer session where the girls justify their ideas.

Many pupils choose to use other students as their market and carry out surveys and pilot projects to test the viability of their products. This has been invaluable in encouraging them to question their preconceptions of a market they thought they understood. In addition, they learn to recognise the need for careful research.

The pupils often have innovative ideas but putting them into practice provides more challenges than they realise. The time constraints of a busy school term combined with organising the finer details, where and when to sell their product, as well as the unique issue of there being little physical cash in the country, offer obstacles that they have to negotiate. As teachers we see their growth in how they deal with these challenges on a weekly basis and an increasing focus on organisation skills.

The school is also seeing the emergence of leadership qualities within the cohort of students undertaking Cambridge IGCSE Enterprise. They feel that this will have an impact on their progress in the school where all students in the Upper Sixth Form are given the opportunity to serve as 'senior leaders'.

This programme aims to encourage, enhance and exploit the leadership potential of all the students, to give them valuable management experience that will be relevant throughout their lives.



Final thoughts

We hope this guide has helped you think about how you might use the Cambridge learner attributes to help develop teaching practice and shape a curriculum which belongs uniquely to your school.

We are very grateful to the 17 schools who have shared some of their experiences through providing case studies for this guide. What is clear from reading these case studies is how every school engages with the learner attributes in different ways.

Cambridge International is committed to helping schools improve. With approximately 10 000 schools in over 160 countries using our educational programmes and qualifications – often combined with national or other curricular components – our role is to support you in making the right decisions for your school. Excellent schools understand their own culture and context, and constantly strive to improve teaching and learning taking these factors into account.



Students at Southland Girls' High School, New Zealand (*case study 18*)

Appendix 1

How developing the learner attributes can help students to prepare for success in further education and the workplace

What are universities looking for in undergraduates?

Universities want knowledgeable students with good learning habits who are passionate about the discipline they are studying, able to apply their understanding to new questions and contexts.

Knowledge and understanding need to be backed up by effective learning habits. A study conducted by Cambridge Assessment Research Division (Dale, 2011), interviewing admissions officers and academic tutors from a number of universities in a wide range of subjects, identified 10 generic competency areas: active enquiry, open thinking style, motivation, self-discipline, organisation, coping with demands, resilience, self-reflection, emotional control and organisation citizenship. Table 1 taken from the study illustrates responses to the question: What do students performing at different levels at university do differently?

Guy Claxton (2014) illustrates this with an example taken from the University of Cambridge admissions interview. Students are given extremely searching questions by the interview panel. What they want to see is evidence that the student can 'flounder intelligently'. This strategy is widely used by top universities that interview students as part of the application process. Often the question will not have a correct answer. Good candidates will display the list of characteristics in the top category in Table 1. They probably will not give the correct answer but the way they attempt an answer will tell a great deal about their potential.

Universities often complain that learners have been 'spoon-fed' information and lack the requisite thinking skills to progress successfully to higher education. The following comments reflect this:

'At interview we are observing how students behave when they are struggling, and how they respond to advice. Many students have always been "good at maths" and can't cope when they are finally challenged.'

Table 1: Categories of undergraduate students

Top	Average
Intellectual magpie. Engaged with the subject. Critical and questioning. Makes connections. Integrates material. Self-directing. Confident, will try new things. Works through problems and setbacks. Proactive, finds out what is needed. Focuses on the right things. Strong sense of purpose. Thinks and arranges things in a systematic way. Can reflect on how they are doing and learning experiences.	Absorber, takes things in, but less questioning. Wants to know what it is they have to do to get a good degree. Step-by-step approach to learning. Planned approach to work. Takes on board criticism and self-aware of their progress. May need pointing in the right direction. Achievement oriented, may re-direct energies if they feel they are not doing well enough on the course.
Struggling	**Problem**
Passive, does not ask questions or otherwise participate. Linear thinking, over-focused on a single answer. Waiting for you to help them. Can work harder and harder, rather than smarter. Wants to please but can try too hard. Gets very upset if they make a mistake. Listens but seems unable to make changes. Can become a solitary learner. Easily discouraged.	Highly critical of staff and other students. Problems with authority figures. Lacks a sense of responsibility. Always has extenuating circumstances. Poor work ethic. Self-defeating, decides not to try in case they fail. Lacks insight and can be over-confident. Everyone else is the problem. Not a team player. Cannot take feedback. Easily frustrated.

Admissions interviewer, Faculty of Mathematics, University of Cambridge

'I'm looking for students who have the following:

- an ability to think flexibly and adapt arguments in the light of new information
- a willingness to weigh up the relevance of different points of view
- the desire to go beyond "textbook" knowledge and see the limits of what we know
- evidence of an ability to work independently.'

Dr Andrew Thompson: Admissions Tutor and Director of Studies in History, Queens' College, University of Cambridge

Cambridge learner attributes and 'core skills for employability'

Schools are the critical channel through which young people acquire skills that improve opportunities for good jobs. Many key employability skills, such as critical thinking and problem-solving, are dependent on deep content knowledge and cannot be taught in isolation. So teaching such skills requires innovative ways of delivering the academic curricula; it is not about developing a core skills curriculum. The question is how best to integrate these skills into core academic content.

According to the Confederation of British Industry (CBI, 2010), 'a positive attitude is the key foundation of employability… Employers are clear that they are looking to the education system to develop confident, motivated young people, with the attitude, knowledge and skills to succeed in life and in the world of work.' It is critical that schools nurture and develop a broad set of employability skills necessary for all work, which includes teamworking, problem-solving, communications, business and customer awareness and self-management in addition to literacy (including IT) and numeracy.

'Young people's careers will be characterised by change, flexibility and lifelong learning. Business needs its current and future workforce to have the transferable skills and attitudes necessary to succeed in this environment, underpinning the development of job-specific and technical skills' (CBI, 2010).

Like the CBI, the International Labour Organization (ILO, 2013, pp. 14–15) highlights the importance of a high-quality education in preparing young people with the fundamental skills that employers across the world are looking for. The ILO proposes a detailed framework, *Core skills for employability,* which groups these skills into four broad skill categories: learning to learn, communication, teamwork and problem-solving.

The development of Cambridge learner attributes directly contributes to the development of these skills, allowing learners to develop as confident, responsible, reflective, innovative and engaged young adults, preparing them well for their future career (see Table 2).



Students at The Heritage Private School, Cyprus (*case study 14*)

Table 2: The Cambridge learner attributes mapped to the ILO core skills for employability

Cambridge learner attributes	International Labour Organization core skills for employability
Confident in working with information and ideas – their own and those of others. Cambridge learners are confident, secure in their knowledge, unwilling to take things for granted and ready to take intellectual risks. They are keen to explore and evaluate ideas and arguments in a structured, critical and analytical way. They are able to communicate and defend views and opinions as well as respect those of others.	**Learning to learn:** think abstractly; interpret and communicate information; conduct systematic inquiry and follow through with answers; select the best approach for tasks; adaptable **Communication:** write to the needs of an audience; listen and communicate effectively; articulate own ideas and visions **Team work:** respect the thoughts and opinions of others in the group; value others' input **Problem-solving:** think creatively; solve problems independently; test assumptions; identify problems; take the context of data and circumstances into account; adapt to new circumstances; ability to identify and suggest new ideas to get the job done (initiative)
Responsible for themselves, responsive to and respectful of others. Cambridge learners take ownership of their learning, set targets and insist on intellectual integrity. They are collaborative and supportive. They understand that their actions have impacts on others and on the environment. They appreciate the importance of culture, context and community.	**Learning to learn:** pursue independent learning; take responsibility for own learning; manage own learning Team work: interact with co-workers; work within the culture of the group; work in teams or groups; accountability for actions taken; manage oneself at work; value others' input; accept feedback
Reflective as learners, developing their ability to learn. Cambridge learners understand themselves as learners. They are concerned with the processes as well as the products of their learning and develop the awareness and strategies to be lifelong learners.	**Learning to learn:** use learning techniques to acquire and apply new knowledge and skills; pursue independent learning; conduct systematic inquiry and follow through to find answers; take responsibility for own learning; manage own learning; is willing to learn
Innovative and equipped for new and future challenges. Cambridge learners welcome new challenges and meet them resourcefully, creatively and imaginatively. They are capable of applying their knowledge and understanding to solve new and unfamiliar problems. They can adapt flexibly to new situations requiring new ways of thinking.	**Problem-solving:** think creatively; solve problems independently; test assumptions; identify problems; take the context of data and circumstances into account; adapt to new circumstances; ability to identify and suggest new ideas to get the job done (initiative)

Table 2: The Cambridge learner attributes mapped to the ILO core skills for employability *continued*

Cambridge learner attributes	International Labour Organization core skills for employability
Engaged intellectually and socially, ready to make a difference. Cambridge learners are alive with curiosity, embody a spirit of enquiry and want to dig more deeply. They are keen to learn new skills and are receptive to new ideas. They work well independently but also with others. They are equipped to participate constructively in society and the economy – locally, nationally and globally.	**Learning to learn:** pursue independent learning; conduct systematic inquiry and follow through with answers; take responsibility for own learning; manage own learning **Team work:** interact with co-workers; work within the culture of the group; respect the thoughts and opinions of others in the group; value others' input; plan and make decisions with others and support the outcome; build partnerships and coordinate a variety of experiences; work toward group consensus in decision-making **Problem-solving:** think creatively; solve problems independently; test assumptions; identify problems; take the context of data and circumstances into account; adapt to new circumstances; ability to identify and suggest new ideas to get the job done (initiative)

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Appendix 2

Schools providing case studies

The British International School, Vietnam

The British International School is the largest international school in Vietnam and has 2145 students, ranging in age from 2 to 18 and representing 51 nationalities. Based across three campuses in Ho Chi Minh City, the school has nurtured an environment where students work hard but also take risks and try out new ideas. There is a strong focus on the school's Global Network and on the community involvement of the pupils.

The British School in Colombo, Sri Lanka

The British School in Colombo is a co-educational day school and has 1200 students, ranging in age from 2 to 18. Established in 1994, the school strives to enrich the lives of young people by providing a holistic educational experience that allows students to grow to become global citizens. There is a strong focus on social awareness and community initiatives.

Bromsgrove International School, Thailand

Bromsgrove International School is a private international school located on the outskirts of Bangkok. It has 393 students, ranging in age from 2 to 18 and representing 27 nationalities. Founded in 2002, the school conducts admissions screening to determine student placement but is ultimately non-selective and proud of its inclusive ethos. The school strives to produce respectful and ambitious students.

Chisipite Senior School, Zimbabwe

Chisipite Senior School was founded in 1954 and was the first inter-denominational private girls' school in Central Africa. It has 550 students ranging in age from 12 to 18. The school aims to provide a broad and balanced education, and provides a learning environment which both motivates pupils to achieve their full academic potential and encourages them to think creatively, critically and independently.

Confucius International School, China

Confucius International School, Qingdao, was founded in 2009 by the direct descendant and current head of the Confucius family. It is the first educational initiative of its kind to unite the best practices in Western teaching with Confucian teaching and principles. Confucian education is concerned primarily with what constitutes the makings of the 'man of quality' and with the tools that the leaders of today and tomorrow must master.

Doha College, Qatar

Doha College is the leading British curriculum international school in Doha and has more than 1800 students, ranging in age from 3 to 18 and representing more than 70 nationalities. Established in 1980, the college subscribes to High Performance Learning, a pedagogy that requires teachers to instil in the students thinking skills and a growth mindset. The college also has a rich and diverse extracurricular programme.

Escuela y Liceo Elbio Fernández, Uruguay

Escuela y Liceo Elbio Fernández is in Montevideo, the capital city of Uruguay in South America, with approximately 1500 students. It was the first private school in Uruguay, founded by the pedagogist José Pedro Varela. It has always been a school where new paradigms and freethinkers are promoted and where secularism is paramount to guarantee equality and fraternity among students.

First Steps – School of Arts and Sciences, Pakistan

First Steps – School of Arts and Sciences embodies a deep commitment to the provision and advancement of high-quality education. It is a 'Lighthouse School of Excellence' for Faisalabad, which models academic rigour and high student performance. Using whole-child instruction, the curriculum strives to meet individual needs and assist the development of children in all developmental domains: intellectual, social, emotional and physical. The faculty and administration take pride in holding their students to high academic, behavioural and ethical standards. The well-rounded students of First Steps

develop the character traits of honesty, integrity, responsibility and respect as they prepare for further leadership roles.

Frensham School, Australia

Frensham School is a single-sex boarding school in New South Wales. Founded in 1913, the school provides an outward-looking academic programme for girls in Years 7–12. The school offers an enriched and extended curriculum across all year groups. The school began the Jamieson Programme in 1986. The Frensham motto, 'In love, serve one another', encourages students to be active and compassionate in recognising the needs of others and to respond with generosity, demonstrating leadership by example and integrity.

The Heritage Private School, Cyprus

The Heritage Private School is an English co-educational, academically selective school for almost 1000 students aged 2 to 18, with an intake from a wide variety of cultural backgrounds. Founded in 1987, the school provides an education based on the UK national curriculum. In addition to its academic courses, the school also actively involves students in national, European and international educational and community projects to extend experience and learning.

Parkside Middle School, Virginia, United States of America

Parkside Middle is one of 18 middle schools in a highly diverse school division. It is the only middle school in Virginia to be classified as a Cambridge School and it offers the Cambridge ethos, beliefs and philosophy to their entire student population of 1253 6th–8th Grade students. It is also the first Cambridge PDQ School in the USA and currently offers the Certificate in Teaching and Learning to its teaching staff.

The Perse School, UK

The Perse School is an independent secondary co-educational day school in Cambridge, for students ranging in age from 3 to 18. The school was founded in 1615 by Stephen Perse and has an enrolment of more than 1500 students. The Perse has been listed as the top-performing co-educational school for GCSE and Cambridge IGCSE results in national newspapers for the past three years but is committed to a broad and balanced education in which extracurricular and sporting activities play an essential part in the development of its pupils and the success that the school enjoys.

Shenzhen College of International Education, China

Shenzhen College of International Education is a selective UK national curriculum school for predominantly Chinese citizens. Established in 2003, the college teaches Cambridge IGCSE and Cambridge International AS & A Level, and each student attends at least one extracurricular activity per term. The college has a strong focus on educational attainment and on creating successful global citizens.

Southland Girls' High School, New Zealand

Southland Girls' High School is the only state school for girls aged 7 to 13 in New Zealand and has an enrolment of 1200 students. Located in Invercargill and established in 1879, the school has a long history of academic excellence and the students have access to an innovative curriculum. The school has a global outlook and contributes to the World's Largest Lesson.

St Andrew's Scots School, Argentina

Founded in 1838 by Scottish settlers, St Andrew's Scots School in Buenos Aires is the oldest bilingual school in the world. Serving around 1950 students from 2 years of age until secondary school, most of them Argentine, St Andrew's features an extensive bilingual programme with a wide variety of sports and extracurricular activities, and has offered Cambridge examinations for more than 50 years.

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Suffern School, United States of America

Suffern High School is a public 9th–12th Grade school in Suffern, New York, serving approximately 1500 students. Suffern High is ranked in the top 500 high schools in the United States and was named a 2017 New York State High Performing Reward School. Suffern offers a large number of electives through programmes such as Advanced Placement, Cambridge, and numerous local colleges. Ninety eight percent of their students continue into post-secondary educational institutions.

United World College South East Asia (UWCSEA), Singapore

UWCSEA is an international school with more than 5500 students, representing more than 90 nationalities. Established in 1971 and spread over two campuses, the school provides a learning programme consisting of five interlinking elements: academics, activities, outdoor education, personal and social education and service. It is part of the United World Colleges movement

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Cambridge Assessment International Education

Assessment for learning

Assessment for learning (AfL) is an approach, integrated into teaching and learning, which creates feedback for students and teachers in order to improve learning and guide their next steps.

What does assessment for learning mean?

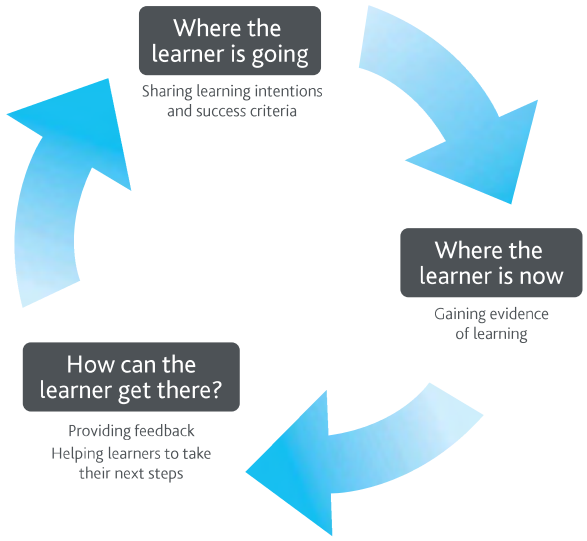
AfL focuses on **both the teacher and student understanding** three key things:

1. **Where the learner is going**. Sharing the aims of a lesson and success criteria helps learners to see what they are aiming for and what they need to do to achieve those aims.

2. **Where the learner is now.** Techniques such as effective questioning will help teachers to gauge what individuals and groups have learnt during a lesson, generating evidence of learning that both teacher and students can make use of.

3. **How can the learner get there?** Teachers use this evidence of learning to inform choices about what they will do next with a class or individual students. Learners can use this evidence to make decisions about their learning, such as how to spend their independent study time.





AfL is concerned with maximising the feedback process (teacher to student and student to teacher) to optimise student learning. Feedback ranges from the **informal** (e.g. oral comments given immediately to learners as they think through problems), to more **formal** (e.g. written feedback given after an end-of-topic test). AfL also involves high-quality **peer and self-assessment** where learners or peers may be involved in making decisions about future learning needs (Wiliam, 2018).

The term 'assessment for learning' became popular in the 1990s. At this time there was concern that learners were being over-assessed and that there was a disproportionate focus on end results (assessment **of** learning) rather than on assessment processes that could actively enable learners to make progress. Both assessment **for** learning and assessment **of** learning are valuable in education, but they have different purposes.

What is the theory behind assessment for learning?

- AfL is associated with **social constructivist** theories of learning. Mental models and assumptions that the learner uses to understand a subject are complex, and are constructed from previous experiences and interactions with others. This means the quality of interactions between teachers and learners is critical in the learning process.
- The work of Paul Black and Dylan Wiliam has been highly influential. Their pamphlet for teachers called *Inside the Black Box* (1998a) was based on a literature review of 250 sources on classroom assessment practices (Black & Wiliam, 1998b). They found that 'the effective use of formative assessment [see below] would increase achievement by between 0.4 and 0.7 standard deviations, which would be equivalent to a 50 to 70 percent increase in the rate of student learning' (Wiliam, 2018, p.38).
- Black and Wiliam (1998a) suggested that formative assessment could be improved by:
  - helping **learners understand** exactly what they have to do in order to succeed
  - encouraging productive classroom **discussion**, including **sufficient thinking time**
  - embedding opportunities for **all** learners to **express their understanding**
  - providing **feedback** that helps students to move on in their learning and avoids comparison with other learners, then giving them the **opportunity** to act on that feedback
  - training learners in **self-assessment** and providing opportunities for them to be **learning resources for each other**.

What other terms are associated with assessment for learning?

- **Formative assessment** has a similar meaning to AfL. The term was introduced to contrast with summative assessment (see below), and show that assessment could be used to **form** students' learning and **look forward to** what they will learn next. Some writers in this area see a distinction between AfL and formative assessment (e.g. Swaffield, 2011), while some use the two terms synonymously (see Wiliam, 2018, for further discussion).
- **Summative assessment** means the same as **assessment *of* learning**. Summative assessment is used to sum up students' learning at the end of a period – for example, once a school term or a course has finished. As it **sums up** what the students have achieved, it **looks back** and indicates what the students have learnt, usually measured formally against clearly defined standards.
- **Diagnostic assessment** refers to assessment that identifies what the learner knows or is capable of, perhaps at the start of a new topic. The focus is on identifying difficulties or misconceptions that the learner might have so that the teacher can plan learning activities to address these.

Both summative and diagnostic assessment activities could also be used to support assessment for learning (see below).

What are the benefits of assessment for learning?

- AfL helps learners and teachers focus on the **aim** of their learning. This can help students understand what constitutes 'excellence', take responsibility for their own learning and plan how they might move forward.
- AfL encourages **assessment and learning** to be seen as an integrated whole. The clarification of objectives and feedback about student learning will have a direct impact on the devising of teaching and learning strategies.
- According to research (Hattie, 2012),'feedback' has a **positive effect on learner achievement** (ranked 10th out of 150 factors), particularly if it involves feedback from learner to teacher. This is important as teachers need this information from learners in order to effectively modify their teaching. Many other factors identified as powerful influences in Hattie's analysis are also closely associated with AfL.

What are the challenges of assessment for learning?

- **Confusing function with instrument:** Sometimes an instrument (such as a test) is seen as formative or summative, when these terms are intended to describe the purpose of their use (Wiliam, 2018). For example, a mid-term test might have both a summative and a formative purpose. It sums up learners' attainment to that point, but it can also be reviewed and the information about learning used for a formative purpose, perhaps through an exam wrapper (see *Education Brief: Metacognition*), or to inform teachers' planning for the next series of lessons.
- **Fidelity of implementation:** Wiliam (2018, p.1), said that 'the **effective** use of formative assessment would increase achievement' (emphasis added). If AfL becomes a superficial exercise (for example a teacher formative comment copied by a student into a grid at the end of the unit, without any opportunity for the student to implement the feedback and with no change to future teaching), then it cannot be expected to make a positive impact on achievement.

- **Assessing long-term recall:** Recent work from cognitive science encourages teachers to think about long-term recall of knowledge. This cannot be evaluated accurately when material has just been taught. Teachers need to plan opportunities for tests (which could be low stakes), which are spaced out over a period of weeks or months to encourage long-term recall (EEF, 2014).
- **Change of practice:** It can be challenging to implement AfL practices in a context where learners, teachers and parents are only familiar with summative assessment. It is important to explain the rationale for changes, for teachers to understand them thoroughly and to implement them slowly over time (Black & Wiliam, 1998a). In particular, careful scaffolding and preparation is needed for learner self- and peer-assessment.
- **Workload:** In some contexts, the implementation of written marking practices has had a negative impact on teacher workload (EEF, 2016). It is important that AfL is embedded in everyday classroom practice (for example oral feedback at the point of need) and that written feedback is high-quality and strategically placed when it will have most value.

Practical tips:

How can schools make the best use of assessment for learning?

- **Professional development** in AfL should be given a high priority. It needs to be ongoing and linked to each teacher's own professional practice.
- Schools can encourage teachers to work together to **review and develop the school's assessment policy and practice** so that assessment is seen as a positive method of encouraging students to learn and understand, without becoming an unreasonable burden on teacher workload.
- Make sure that **written and oral feedback** across the school is accurate, easy to understand and focused on learning, also that learners have the opportunity to put it into practice (Wiliam, 2018).
- Teachers need **support putting principles into practice**. Teacher learning communities can change habits and improve teaching (see *Getting Started with Peer Observation*).
- **Evaluate the impact** of new strategies that are implemented, whether these are tried across the whole school or by individual teachers or departments (see Getting Started with Evaluating Impact*). Allow a* reasonable length of time for new strategies to impact on learner outcomes (Wiliam, 2016).



How can teachers make the best use of assessment for learning?

- Much of AfL is skilled practice that is core to being a good teacher. It involves **multiple strategies** – e.g.:
  - Sharing learning intentions and success criteria in an accessible and engaging way (Hattie & Clarke, 2019) and checking if learners have understood them.
  - Using questioning to check and to deepen understanding within and across lessons. All-student response systems are a helpful way to gauge developing understanding across the whole class e.g. learners using mini-whiteboards to respond to hinge-point questions (Wiliam, 2018).
  - Using focused feedback from teacher, peer-, and self-assessment.
  - Giving formative feedback without marks and/or grades as appropriate. Providing formative comments **linked to specific success criteria** can focus the learner on what they need to do to improve a piece of work without the distraction of marks or grades.
  - Making formative use of summative tests. Results can be used by teachers to change their teaching plans and by learners to highlight areas of development need.
  - Feedback needs to **be related to the learning goals** set for each task. This will allow learners to use the feedback to improve. Feedback could focus on the content and quality of work, how a learner has approached a task, and/or the effectiveness of a strategy they used.
- Effective AfL involves **developing learner autonomy** so they can assess themselves accurately and regulate their own learning. In this way, it supports development of the Cambridge learner attributes.



How is Cambridge supporting schools with assessment for learning?

- **Online resources** such as *Getting Started with Assessment for Learning* provide teachers with new ideas and approaches that link theoretical understanding with practical classroom application.
- **Training** such as our Enrichment face-to-face and online workshops on active learning and assessment for learning provides the opportunity for teachers to develop these practices further.
- **Cambridge Professional Development Qualifications** have been designed to encourage and support the use of assessment for learning.
- **Cambridge Primary and Lower Secondary programmes** are specifically designed to help learners and teachers to make and assess progress and provide feedback on strengths and weaknesses across a range of subjects.

Where can you find more information?

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- Information on Cambridge Professional Development Qualifications can be found at: **www.cambridgeinternational.org/pdq**
- *Getting Started with Assessment for Learning, Getting Started with Evaluating Impact* and *Getting Started with Metacognition* are available on our website at: **www.cambridgeinternational.org/gettingstarted**

Acknowledgement: Teaching & Learning Team, Cambridge International.

Learn more! If you would like to know more about Cambridge Training please email **info@cambridgeinternational.org** or visit **www.cambridgeinternational.org/events** or contact Customer Services on **+44 (0)1223 553554**

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Cambridge Assessment International Education

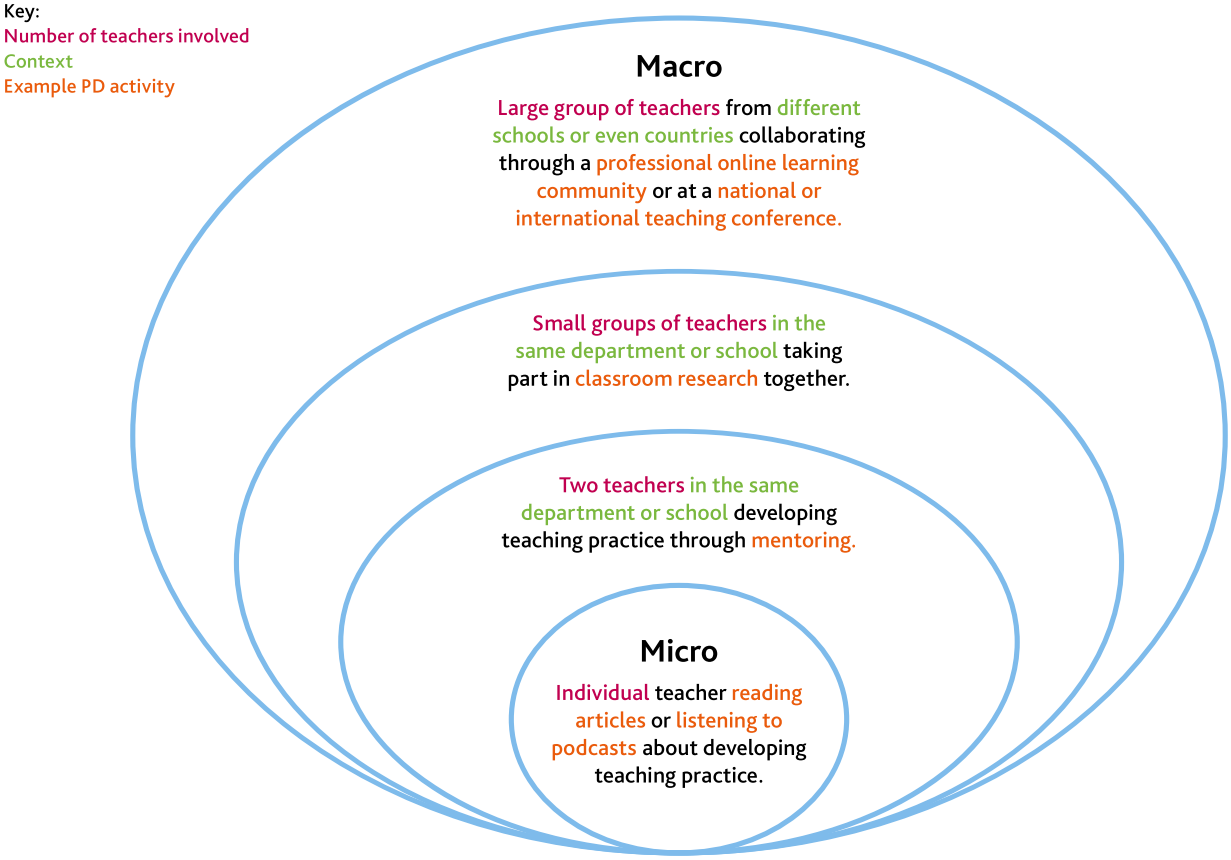
Education Brief: Teacher professional development

Teacher professional development involves a continuous process of reflection, learning and action to further a teacher's knowledge and skills, leading to enhanced teaching practices that positively impact on students' learning.

What does teacher professional development (PD) mean?

- Teacher PD aims to improve teachers and their practice by adopting a holistic approach to developing the teacher as a professional practitioner. It is an ongoing process that supports continuous development of practice throughout the whole of a teacher's career.
- Teaching practice comprises a range of areas, each of which can be targeted by PD activities. For example, in the TPACK model (Mishra and Koehler, 2006) three overlapping areas exist – Technological, Pedagogical and Content Knowledge. PD activities could therefore specifically target subject content knowledge or instead focus on subject-specific pedagogical knowledge (the overlapping areas of Pedagogical and Content Knowledge).
- Any activity that supports teachers to reflect, learn and then act to improve their practice can be classed as teacher PD, and such activities can occur in a face-to-face or online environment. Some examples are given in Figure 1.
- Teachers can engage in PD activities at the micro (individual) or macro level (collaborating with teachers across a range of contexts; Figure 1).

Figure 1: Micro to macro scale engagement with PD activities



What other terms are associated with teacher PD?

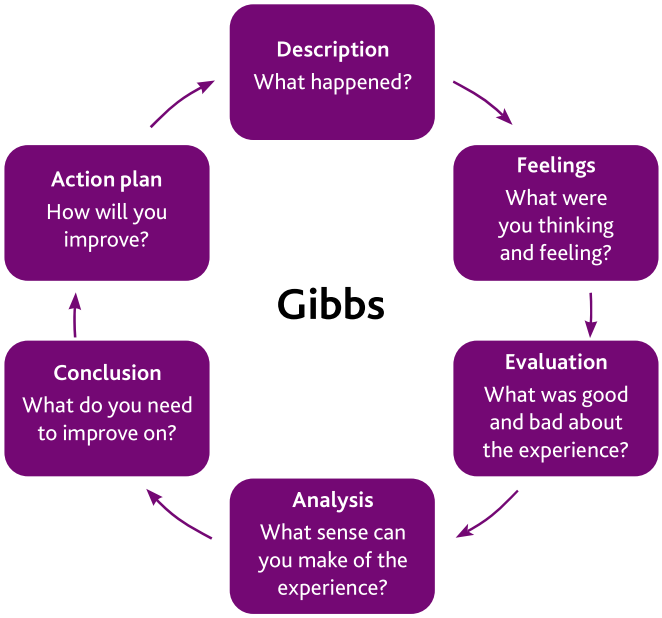
Other terms commonly associated with teacher PD include:

- **Continuing professional development (CPD)** reinforces the notion that professionals should always develop their expertise and teaching practice.
- **Teacher (**or **professional) education** emphasises how engagement in educational experiences leads to learning, advancing a teacher's knowledge, skills and characteristics and enhancing their practice.
- **Training** often develops operational features of a role, focusing on accomplishing one specific skill, such as understanding how to teach a syllabus or how to write learning objectives.
- **Mentoring and coaching** are slightly different from one another. **Mentoring** focuses on establishing a supportive relationship where a less experienced teacher benefits from the guidance of a more experienced colleague (a 'critical friend'). **Coaching** is a technique that provides structured support to encourage a practitioner to review and develop their practice in relation to a specific skill or change in circumstance.
- A **professional learning community/network** brings practitioners together, enabling the sharing of ideas and experiences, as well as providing mutual support, either online or face to face.
- In **action research** teachers conduct research into their own practice with the aim of finding out how they might overcome a specific issue or problem associated with their practice.

What is the theory behind teacher PD?

- **The impact of teachers on learners:** Educational research indicates that teachers and their classroom actions play a large role in explaining variation in learner achievement (Creemers and Kyriakides, 2013). Therefore, effective teacher PD can positively impact teachers' practice and substantially improve learner outcomes.
- **Teachers as learners themselves:** Dylan Wiliam captured the notion of teachers as lifelong learners when he said: 'Every teacher needs to improve, not because they are not good enough, but because they can be even better'. Teachers' expertise can also be developed through formative feedback within a professional learning environment (Coe et al., 2020), echoing the social constructivism approaches to learning (Vygotsky, 1978) that teachers use with their own learners.
- **Engaging in reflection** is a fundamental aspect of teacher PD. By undertaking careful and deliberate critical analysis of classroom events and asking *'Why?'* to determine the reasons behind the events, teachers subsequently develop their practice and expertise, recognising what changes to practice to make in the future (Dewey, 1933; Schön, 1983; Tripp, 1993). Many models depict the cyclical nature of the reflection process: Kolb's Experiential Learning cycle (1984); Gibbs' Reflective Cycle (1988, Figure 2); Driscoll's 'What? So What? Now what?' cycle (2007); and Jasper's 'Experience, Reflection, Action (ERA)' cycle (2003).

Figure 2: Gibbs' Reflective Cycle



What are the benefits of teacher PD?

- **Improved learner outcomes:** Numerous research studies highlight the vital role that teachers play in securing learner outcomes (e.g. Creemers and Kyriakides, 2013; Hattie 2012). Teacher PD that is explicitly focused on improving learner outcomes has a significant impact on learner achievement (Cordingley et al., 2015). Therefore, by enhancing teachers' practice through effective PD opportunities, learner achievement will also improve.
- **Increased teacher motivation:** PD activities that provide teachers with a sense of agency and control over their professional development foster intrinsic motivation in teachers (Coe, 1998). Teachers also express higher job satisfaction when they have autonomy over their own PD (Worth and Van den Brande, 2020).
- **Benefits for schools and the sector:** When teachers engage in PD activity, individual schools and the school sector overall can benefit through:
  - the retention of teachers in the profession (Worth and Van den Brande, 2020).
  - an elevation of a school's reputation for effectively supporting learning as learner progress accelerates and outcomes improve.
  - enhancing a school's reputation as a place where staff are valued and supported to develop as professionals.
  - the wider sharing of best practice pedagogies for sector-wide improvement.

What are some of the misconceptions of teacher PD?

- **More experienced teachers cannot benefit from PD:** PD is a continuous process – teachers benefit from PD throughout, not just at the start of, their career. The number of years of teaching experience does not necessarily equate to expertise (Hattie, 2012) – it is also important for teachers to adapt teaching practices as educational contexts change (e.g. as a consequence of globalisation or emergency situations such as a pandemic) and to keep up to date with emerging pedagogical research and technological advances that inform effective teaching practices.
- **PD opportunities are one-off training events:** PD is more successful and leads to long-lasting and meaningful changes in teaching practice if it is contextualised and prolonged, with multiple opportunities for ongoing support and follow-up (Cordingley et al., 2015). Such a PD programme can be coordinated internally, externally, or through both means.
- **Passive engagement in PD is effective:** PD activities in which teachers remain passive recipients of knowledge and ideas rarely result in long-term changes in teacher practice (Cordingley et al., 2015). Teachers should instead have the opportunity to actively engage with new ideas and content, just as they would expect their learners to do, reflecting on how these apply to their own context.
- **PD takes lots of time for little impact:** PD should be embedded and integrated into a teacher's role, rather than considered as an extra activity. If implemented effectively, the time invested in PD will pay off. However, changing established ways of working commonly elicits both positive and negative emotional responses (e.g. Kelley and Conner, 1979), meaning that reflection cycles and a support network are vital to ensure that implementation of learning from PD activities occurs for long enough to see impact. We can use models such as the 'five levels of professional development evaluation' (Guskey, 1999) to help us gauge impact from participants' reaction to student learning outcomes.
- **PD is expensive:** Sometimes PD can be expensive but investing in high-quality PD programmes can elicit significant positive impact on teaching practices – make sure to invest in the most appropriate type of PD for your context and needs. Remember that free PD can also be impactful, for example, engaging with self-study guides in a reading group or being an active participant in learning communities through social media platforms.
- **Investing in teacher PD leads to loss of teachers:** Teachers gain job satisfaction through engaging with PD (Worth and Van den Brande, 2020) which in turn enhances their motivation. Therefore there is a danger that teachers who do not have the opportunity to engage in PD activities could leave their school, or even the profession.



Practical tips

How can schools support PD?

- **Actively demonstrate that teacher PD is valued in your school.**
  - Provide teachers with the resources that they need to engage in effective PD and for it to have impact, such as access to internal and external expertise and opportunities to follow up and consolidate learning.
  - Integrate PD into your teachers' roles and schedules, ensuring they can engage in PD activities regularly, rather than only when there is 'spare time'.
  - Elevate the status of PD in your school by formally recognising engagement with teacher PD, for example through teacher retention, promotion and remuneration.
- **Establish a collaborative learning culture** where opportunities for teachers to learn together – both within and beyond their school – are crafted and celebrated. This approach employs Vygotsky's (1978) social constructivism theory by allowing teachers to build understanding and progress in their learning by interacting with colleagues. Hattie (2016) also ranks collective teacher efficacy as having a very large positive impact on student achievement.
- **Reflect on your school context and teacher needs** to ensure that any PD activity will meet your teachers' and school's specific needs (Ellams, 2018). This keeps the PD relevant, meaning it is more likely to have impact.

- **Use the research evidence** to identify the most impactful areas to focus on for improving teaching practice and student learning in your school, for example Hattie's (2012) work on effect sizes, Creemers and Kyriakides' dynamic model of teacher effectiveness (2013), Rosenshine's (2010) 10 principles of instruction, and the Great Teaching Toolkit (Coe et al., 2020).
- **Remember quality assurance:** Cordingley et al. (2015) identified the key features of successful PD programmes, such as their ongoing nature, meeting teachers' specific needs and providing opportunities to put learning into practice in the classroom – remember these features when designing internal PD programmes. When sourcing external PD providers seek quality – do not be afraid to ask the provider how they will approach the PD programme and check it aligns with the research, such as tailoring of the PD offering to the needs of your teachers and school context. In both cases the school senior leadership team should collectively support the PD programme and teacher involvement with it.

How can teachers engage in PD?

- **Do not try to do everything at once.** Select one or two aspects of your practice to focus on developing and master these first before targeting further areas.
- **Seek guidance from evidence-informed sources** to identify teaching practices that are likely to strongly impact on your learners' learning (see the, '**Use the research evidence',** bullet point in the How can schools support PD? section above).
- **Take time to identify the existing strengths** in your practice – we can be overly critical of ourselves and focus only on areas of weakness. Try reflecting against recognised sets of teacher standards or seek feedback from colleagues. Keep doing the things you do well and get even better at them! Teachers with specific expertise are vital for supporting others to develop in these areas.
- **Identify areas for improvement:**
  - **Engage with colleagues** as sometimes we do not know what we do not know – often known as unconscious incompetence. A critical friend can help you to identify areas of your practice to improve.
  - **Ask yourself where most of your PD activity lies.** Do you mainly engage in PD on subject content knowledge? Do you tend to engage in individual PD activities at the micro level (see Figure 1)? Try broadening the types of PD activity you engage with to develop your practice more holistically.
- **Once you have identified one or two areas of focus, create an action plan.** Set specific goals and build in time to engage in reflective cycles to determine whether the changes to your practice are having an impact. Decide if you will share your progress with others, maybe through a mentor relationship or professional online learning community – this can help to keep you motivated.
- **Learn from your students!** Your learners are key stakeholders and a great source of information about what does (and does not) work well in your classroom. You can also get feedback from your learners (quick surveys, exit slips or short focus groups work well) and use this in your reflections to update your action plan.

How is Cambridge International supporting schools with teacher PD?

Our PD framework ensures all teachers and leaders have a wide variety of PD options to choose from to meet their experience level and specific needs. Our approach to PD reflects the principles outlined in this brief, supporting teachers to embody the Cambridge teacher and learner attributes: **confident, responsible, reflective, innovative** and **engaged.**

- Our **webpages** include numerous resources to support all Cambridge schools and their teachers. In particular, the Teaching Cambridge at your school webpage links to our Education Briefs, the Cambridge School Leader Standards and Cambridge Teacher Standards and self-assessment grids, and 'Getting Started with…' guides. The Getting Started with Evaluating Impact and Getting Started with Reflective Practice resources are particularly relevant for this brief.
- The **School Support Hub** is a secure online site for teachers at Cambridge schools, consisting of many thousands of high-quality teaching and learning resources, including schemes of work and learner guides.
- **Online and face-to-face professional development** events support teachers according to their experience and needs, with the offer comprising syllabus-based training, as well as Enrichment Professional Development.
- **Cambridge Professional Development Qualifications**, consisting of guided learning, individual study and collaborative learning, and school-based learning, help teachers develop their thinking and practice with expert guidance and support.
- We regularly hold **Cambridge Schools Conferences**, which include keynote speakers and workshops, and bring together Cambridge teachers and principals from across the globe.

Author acknowledgment: Dr Karen Angus-Cole

Where can you find more information?

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CAMBRIDGE
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Exam day checklist

This is a guide for exams officers and invigilators. Use it to check you are ready for each exam and that you are following all our regulations.

1. Before the exam starts

Make sure:

- the exam room is set up properly
- your invigilators are fully briefed
- you have any additional materials the candidates need.

Use the checklist below to make sure you and your invigilators are fully prepared. If you are unsure about any of the points below see sections 4 and 5 of the *Cambridge Handbook*.

- ☐ I have timetabled the exam is correctly and all candidates will be in the exam or under Full Centre Supervision at the Key Time.
- ☐ I have checked the conditions in the exam room are suitable (heat, light, noise, cleanliness).
- ☐ I have displayed The Notice to Candidates and Candidate Warning posters both inside and outside the exam room.
- ☐ I have covered up any display material which might be helpful to candidates (e.g. periodic tables, maps).
- ☐ I have correctly placed the desks and I am using the exam room space to its full potential to space candidates as far apart as possible. There is a minimum distance of 1.25 metres between the centre of one candidate's chair to the centre of another's, when the chairs are pulled out as though a candidate were sitting at the desk.
- ☐ I have checked the type of desk in the exam room is suitable (for example, there is enough space on the desk for everything the candidate needs and any desk shelves have been checked for unauthorised material).
- ☐ I have put candidate numbers on the desks.
- ☐ A clock can be seen from each candidate's desk, and it is displaying the correct time.
- ☐ I have printed the 'Cambridge Handbook 2024: sections and 4 and 5 (abridged)', and the 'Cambridge Handbook 2024: Key Times and Full Centre Supervision' documents. I have put them in all exam rooms.
- ☐ I have the right number of invigilators for the number of candidates sitting the exam and they can call for assistance if needed without disturbing candidates.

- ☐ I have trained all the invigilators and am confident they understand what they need to do.
- ☐ I have the correct question paper packet(s) and other materials for the exam.
- ☐ I will securely store question papers packets and other confidential materials. I will not leave packed unattended at any time between removing them from secure storage and starting the exam.
- ☐ I have the script packet envelopes ready to pack the scripts into at the end of the exam, and the relevant bar-coded labels.
- ☐ I know which materials (dictionaries, set texts, calculators) are allowed in the exam (check the Additional Materials List available at www.cambridgeinternational.org/beforetheexams if you are unsure about which materials are allowed in each exam.).
- ☐ I have a copy of the relevant 'What to Say to Candidates in an Exam' document ready to read aloud to the candidates in English.
- ☐ If I am using multiple exam rooms, I have set up each exam room with the same requirements as above.
- ☐ I have allocated which washrooms may be used by candidates during the exam, and checked each cubicle for any unauthorised materials.

2. Before the candidates enter the room

You must be sure of the identity of all your candidates and make sure that they do not bring any unauthorised materials into the exam room.

- ☐ I am sure of the identity of each candidate.
- ☐ All candidates have handed in any unauthorised materials and I have stored these outside the exam room.

Once you have checked the above, ask the candidates to enter the exam room in silence and sit at their desks.

3. Once the candidates are seated

Once the candidates are seated, two members of staff must check they have the correct question paper packet before opening it and handing out the question papers. To make sure all candidates have the same exam experience you must read aloud a specific set of instructions at the start and end of the exam. The instructions are available at www.cambridgeinternational.org/examday

- ☐ Together with another member of staff, we have checked that we have correct blue questions paper packet before opening it. We have checked:

- ☐ the centre number
- ☐ exam date
- ☐ session (AM/PM/EV)
- ☐ syllabus name
- ☐ syllabus code
- ☐ component code

are correct and there is no damage to the blue question paper packet.

- ☐ After opening the blue question paper packet, together with another member of staff, we have checked the syllabus and component shown on the question paper is correct and there is no damage to the inner packet before opening it.
- ☐ I have checked the instructions on the front of the question paper to make sure our arrangements for unauthorised materials are correct.
- ☐ I have read aloud the instructions to candidates and the exam is now in progress.

4. During the exam

During the exam all invigilators must be alert, move around the room and supervise the candidates to make sure they do not cheat or distract other candidates. Invigilators should look out for candidates who may be using electronic devices, including smart watches, and for any other irregular behaviour, such as clicking pens during multiple-choice exams.

There are a few tasks you need to complete during the exam:

- ☐ I have completed the attendance register, adding the names of any candidates not listed to the bottom of the document.
- ☐ I have completed a seating plan. It shows how the room is set up, including the position of the tables, chairs and invigilators' desks and the direction the candidates are facing.
- ☐ I have told candidates that only five minutes remain until the end of the exam.

Remember to follow the regulations detailed in the *Cambridge Handbook* when responding to any situation during the exam:

- See section 5 if a candidate arrives late or if anything unexpected happens.
- Your invigilators must tell you about any suspected malpractice that happens during the exam. Your Head of Centre must then report the suspected malpractice to us immediately using Exam Day – Form 9, available at www.cambridgeinternational.org/examday
- Only answer candidate's questions about information on the front of the paper.
- Do not give any advice to candidates about the content of the question paper.

- If a candidate needs to leave the room temporarily, make sure they are accompanied by an invigilator.
- If a candidate leaves the room, without intending to come back, make sure they are kept under Full Centre Supervision until the Key Time has passed and that you collect their question paper and answer script (if applicable).
- Do not remove any question papers from the room.

5. At the end of the exam (candidates are still seated)

To make sure all candidates have the same exam experience, there are a number of tasks you need to complete at the end of the exam:

- ☐ I have read aloud the instructions in the *What to Say to Candidates in an Exam* document.
- ☐ I have checked and signed the attendance register.
- ☐ I have collected and accounted for all question papers, answer scripts and unused stationery.
- ☐ I have checked the question papers and answer sheets (if any) to make sure that:
    - the candidates have written their name, candidate number and centre number on all their answer sheets or question papers
    - candidates have numbered their answers correctly
    - candidates have fastened any supplementary sheets of paper to the back of their answer booklet or question paper.
- ☐ I have arranged the question papers and answer sheets into candidate number order, and sealed these in an envelope in front of candidates (if using only one exam room)
- ☐ I have told candidates they can leave the room, and that if the Key Time has not passed they are now under Full Centre Supervision.

6. At the end of the exam (after candidates have left the room)

- ☐ If I have used multiple exam rooms, I have brought all question papers and answer sheets together to be sealed in candidate number order.
- ☐ I have packed the scripts, relevant attendance registers and any access arrangement coversheets into the script packet envelopes provided, attached the relevant bar-coded label and sealed the packet.

- ☐ Where there is more than one bar-coded label, I have packed the attendance register and scripts for the range of candidate numbers on the labels into separate script packet envelopes.

Calculators and dictionaries

Section 5 of the *Cambridge Handbook* explains our regulations on dictionaries. For up-to-date information about calculators, please check the Additional Materials List available at www.cambridgeinternational.org/beforetheexams.

Running exams with access arrangements

If you have candidates with access arrangements in their exams, please see section 1.3 of the Cambridge Handbook for details about how run exams. Section 1.3 of the Cambridge Handbook has more information about each access arrangement and how they are used in exams. For information on separate or small room invigilation see section 1.3.8, and for emergency access arrangement information, see section 1.3.9.

Key Times and Full Centre Supervision

Key Times

- The Key Time is a single point in time, defined by the location and country of a centre, stipulated by Cambridge, when all candidates taking timetabled exams must either be in an exam or under Full Centre Supervision.
- If the Key Time is before or after the exam, keep candidates under Full Centre Supervision from the Key Time or until it passes.
- If a candidate finishes early and wants to leave the exam room before the Key Time, they need to be kept under Full Centre Supervision until the Key Time passes.

Full Centre Supervision

Full Centre Supervision is a specific type of supervision for exam candidates. If candidates are not in their exam at the Key Time they must be under Full Centre Supervision. This means that they must be supervised by teachers or invigilators and that they cannot have access to any form of external communication, for example, a mobile phone or the internet.

Full Centre Supervision can be in the exam room or any other suitable room.

- You must have enough invigilators/supervisors to make sure all candidates are following Full Centre Supervision requirements.
- Candidates can have access to books and revision notes during Full Centre Supervision.
- Candidates can talk to each other, as long as they do not disturb other candidates.
- Candidates must not communicate with anyone who is not under Full Centre Supervision.
- If a candidate needs to leave the room during Full Centre Supervision they must be accompanied by an invigilator.

Multiple-choice and practical exams

Multiple-choice

We provide answer sheets for multiple-choice exams. Invigilation arrangements are slightly different for multiple-choice exams. The differences are detailed below.

- We send you multiple-choice answer sheets for each candidate.
- You must arrange exam desks at least 1.25 metres apart (if possible this should be 2 metres), in all directions, so that candidates cannot see the work of others.
- You should distribute answer sheets before the exam.
- Make sure you give candidates the correct multiple-choice answer sheet – there may be different versions available depending on the syllabus: www.cambridgeinternational.org/multiple-choice
- Ask candidates to check their pre-printed details and sign in the space provided to show they are correct.
- Tell candidates who do not have personalised multiple-choice answer sheets to enter their details on the supplementary sheets, writing their names in block capital letters.
- You can download supplementary sheets from www.cambridgeinternational.org/examday
- Read the instructions on the front of the answer sheet to make sure that candidates use the answer sheet properly.
- For each absent candidate fill in the appropriate lozenge on their answer sheet, using a pencil, and include the answer sheet in the return despatch.
- At the end of the exam arrange all the sheets in candidate number order.

Science practicals

Invigilation arrangements are slightly different for science practical exams. The differences are detailed below.

- Make sure you have access to the confidential instructions – they may include some specific administrative instructions.

- Candidates are allowed to use calculators but these must not be in a case.
- Remind candidates they should only use pencils for graphs and diagrams.
- You must make sure there is a subject specialist in the exam room to help you with any technical issues. This is usually the supervisor who is responsible for setting up the exam.
- Arrange equipment and chemicals to limit the need for candidates to move around.
- During the exam candidates will need to move around and the supervisor may need to give spoken instructions. Please make sure this does not compromise the security or integrity of the exam in any way.
- Only communicate with candidates about administrative and safety issues.
- In some cases, you can give practical assistance to candidates (this will be explained on the front of the question paper or in the confidential instructions). Keep a note if you give any assistance to candidates.
- If a candidate experiences any difficulties during the exam, communicate directly with them. If it is something that affects all the candidates, you can make an announcement as long as the security or integrity of the exam is not compromised. The supervisor should make a note of this in their report.
- If a candidate appears to be having problems with faulty equipment, tell the supervisor. They will determine if there is a problem with the equipment. If the problem is with the equipment this should be replaced or fixed as soon as possible. Any issues should be recorded in the supervisor's report.
- You can give more materials to candidates if they need them. The supervisor is allowed to increase the quantity of each substance used in the exam by 25 per cent.
- The supervisor's report must be signed by a subject specialist. A copy of the report must be sent to Cambridge with the scripts.

If for some reason you do not have all the required materials for a science practical exam, please contact us immediately at info@cambridgeinternational.org or +44 1223 553554.

Information Technology, Computer Science and Information & Communication Technology practical exams

We make instructions about invigilating Cambridge IGCSE™ and Cambridge International AS & A Level practical tests for the about subjects available to you at least one month before the tests start. These are available on our website: www.cambridgeinternational.org/beforetheexams and we also let you know they are available via the Exams Officer's eNewsletter.

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CAMBRIDGE
International Education

Fees list: USA

May and June 2026 series

Introduction

In this list you will find our:

- Cambridge Pathway qualification entry fees for:
  - Cambridge Primary
  - Cambridge Lower Secondary
  - Cambridge Upper Secondary
  - Cambridge Advanced
- Cambridge Professional Development Qualification (PDQ) fees
- administration fees.

Cambridge Primary and Cambridge Lower Secondary

US DOLLAR ($)

Qualification fees (per exam entry)	
Cambridge Primary Checkpoint (per candidate, per subject)	30.00
Cambridge Lower Secondary Checkpoint (per candidate, per subject)	45.00

Cambridge Upper Secondary and Advanced

US DOLLAR ($)

Qualification fees (per exam entry)	
Cambridge IGCSE™	82.75 per subject
Cambridge IGCSE Double Award	165.50 per subject
Cambridge ICE entry fee	90.70 per certificate
Cambridge International AS Level component or A2 Level component (except AS Level Global Perspectives)	124.80 per subject
Cambridge International A Level (except A Level Global Perspectives)	201.85 per subject
Cambridge International AS Level Global Perspectives component	218.85
Cambridge International A2 Level Global Perspectives component	169.45
Cambridge International A Level Global Perspectives	275.35
Cambridge IPQ	169.45 per subject
Cambridge AICE Diploma entry fee	143.75 per diploma

Cambridge Professional Development Qualifications (Cambridge PDQs)

Registered Cambridge schools: access to the Cambridge PDQ programme is included in the Cambridge Primary, Cambridge Lower Secondary, and the Cambridge Upper Secondary and Advanced programme fees following a successful approval application.

	US DOLLAR ($)
Induction fees (per Programme Leader)	
Online Programme Leader Induction course with delivery materials	593.25
Online Programme Leader Extension course with delivery materials	326.30
Resubmission of the programme plan and rationale for Online Programme Leader courses	120.90 per module
Qualification fees (per exam entry)	
PDQ Certificate (Module 1) – Syllabuses starting with the number 6	421.00
PDQ Certificate (Module 1) – Syllabuses starting with the number 5	484.20
PDQ Diploma (Module 2) – Syllabuses starting with the number 6	252.60
PDQ Diploma (Module 3) – Syllabuses starting with the number 6	252.60
PDQ Diploma (Module 2 + 3) – Syllabuses starting with the number 5	505.20

Administration fees

You can find fees for results services, post-results services and late entries below. After the final entry closing date, we will charge late fees for any new entries you make, as well as for any entry amendments or syllabus changes. For more information about these services please see the Cambridge Handbook.

	US DOLLAR ($)
Late entries (in addition to the normal syllabus fee)	73.55 per entry, per subject
Very late entries (in addition to the normal syllabus fee)	183.90 per entry, per subject
Results services	
Duplicate results – whole school	103.10
Duplicate results – broadsheet only	68.90
Duplicate results – additional fee for despatch by courier	89.60
Priority results information	99.15
Priority results information – additional fee for extra copy	27.60
Priority results information – additional fee for despatch by courier	89.60
Post-results services	
Certifying statement search fee	99.15
Certifying statement – additional fee for extra copy	27.60
Certifying statement – additional fee for despatch by courier	89.55
Certifying statement – additional fee for authentication per statement	351.95
Replacement certificate – candidate/centre details change requested after the issue of certificates	99.15
Replacement certificate – additional fee for despatch by courier	89.55
Replacement statement of results – candidate/centre details change requested after the issue of statements of results	99.15

Replacement statement of results – additional fee for despatch by courier	89.55
Verification of results	44.00
For Enquiries about Results (EARs) services for Cambridge IGCSE™ and International AS & A Level	*See table below*
Recalculation of Cambridge ICE or the Cambridge AICE Diploma (non-refundable fee)	
For the first five candidates	238.75
For each additional candidate	24.00
EARs service for Cambridge Professional Development Qualifications: Service 3 – Review of marking and clerical re-check, with detailed report on syllabus assignment (fee per candidate)	137.70
Appeals against enquiries about exam results outcomes Stage 1	343.75
Appeals against enquiries about exam results outcomes Stage 2	412.15

Enquiries about results (EARs) — **US Dollar ($)**

Service number	Description	Cambridge IGCSE™ Component fee	Cambridge International AS & A Level Component fee
1	Clerical re-check (fee per candidate)	37.35	41.40
1S	Clerical re-check with a copy of the script (fee per candidate)	81.40	82.50
2	Review of marking and clerical re-check (fee per candidate)	86.80	103.10
2S	Review of marking and clerical re-check with a copy of the script (fee per candidate)	130.80	148.70
5	Re-moderation of the school's coursework marks for a component, together with a report on the assessment of the coursework of the candidates (fee per cohort)	495.30	573.50
9	Report on the work of a group of candidates Note: The report is for the information of teachers only and does not involve any review of marking For the first five candidates: For each additional candidate up to maximum 15:	 452.90 63.10	 507.90 82.60
10	Review of selection of evidence – for portfolio of evidence route A review of the choice of the pieces of evidence included in the candidate's portfolio to check that the pieces of evidence chosen meet the criteria for selection in our published portfolio of evidence guidance (fee per candidate)	173.60	206.10

Other fees

Fees for publications, merchandise, consultancy on curriculum, assessment design and school improvement are available on request.

Refund of fees

We only refund fees if you let us know about the withdrawal of a candidate before the published entry closing date. We issue refunds after the end of the exam series. More information is in the Cambridge Handbook at www.cambridgeinternational.org/examsofficersguide

Taxation

Fees are net of local taxation. All fees are payable without deduction for any taxes; all sums payable to us shall be increased to the extent necessary to provide us with the same net amount we would have received if no such taxes had been applicable to those fees.

Invoicing and payment

We email invoices to your designated Finance contact at your school or centre. To update or change this information, please contact us at info@cambridgeinternational.org

Learn more

You can find out more about the stages of the Cambridge Pathway on our website.
Our fees: Learn more at www.cambridgeinternational.org/why-choose-us/join-cambridge/our-fees
Cambridge Early Years: Learn more at www.cambridgeinternational.org/earlyyears
Cambridge Primary: Learn more at www.cambridgeinternational.org/cambridgeprimary
Cambridge Lower Secondary: Learn more at www.cambridgeinternational.org/lowersecondary
Cambridge Upper Secondary: Learn more at www.cambridgeinternational.org/uppersecondary
Cambridge Advanced: Learn more at www.cambridgeinternational.org/cambridgeadvanced
Cambridge Professional Development: Learn more at www.cambridgeinternational.org/pdq
Professional development training courses (subject and skills based): Learn more at www.cambridgeinternational.org/professionaldevelopment
Fees for teacher training depend on the type of delivery method and are available on request. Contact info@cambridgeinternational.org for more information.

If you have any questions

Contact us at info@cambridgeinternational.org. Our Customer Services team is available 24 hours a day, 6 days a week. Our hours are Sunday 00:01 UTC to Friday 23:59 UTC, all year round. We are closed on Saturdays 00:01 UTC to 23:59 UTC. For help, go to www.cambridgeinternational.org/help

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Cambridge Assessment International Education

Metacognition

Metacognition describes the processes involved when learners plan, monitor, evaluate and make changes to their own learning behaviours.

What does metacognition mean?

The prefix 'meta' means 'about' the thing itself. So, metacognition is 'cognition about cognition', or 'thinking about one's thinking'. It is often considered to have two dimensions: metacognitive knowledge and metacognitive regulation.

- **Metacognitive knowledge** includes the learner's knowledge of their own cognitive abilities (e.g. I have trouble remembering dates), the learner's knowledge of the nature of particular tasks (e.g. the ideas in this article are complex), and the learner's knowledge of different strategies including when to use these strategies (e.g. if I break telephone numbers into chunks I will remember them) (Brown, 1987; Flavell, 1979).
- **Metacognitive regulation** describes how learners monitor and control their cognitive processes. For example, realising that the strategy they are using to solve a mathematical problem is not working and trying another approach (Nelson & Narens, 1990). Monitoring and control are described in more detail in the following section.

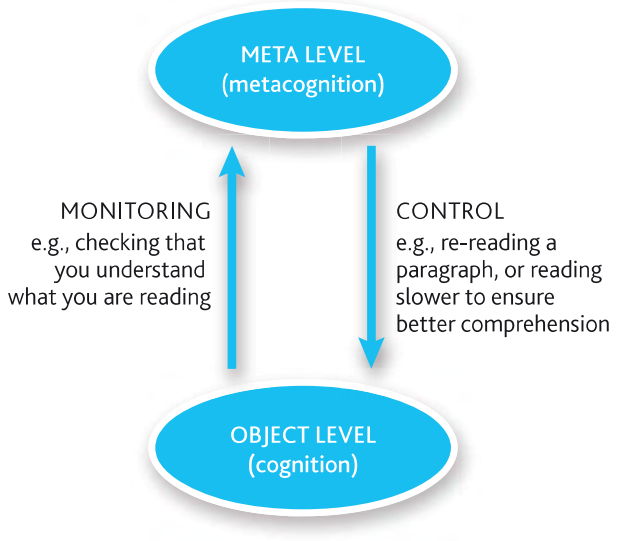

Figure 1. Nelson and Narens' (1990) Model of Metacognition



What is the theory behind metacognition?

A theory of metacognitive regulation that is widely cited in the research literature is Nelson and Narens' (1990) model of metacognition. This consists of two levels: the **object level** and the **meta level** (see Figure 1 below).

- The **object level** is where cognitive processes or 'one's thinking' occurs. One example is decoding text when reading. At the object level, cognitive strategies (e.g. decoding) are used to help the learner achieve a particular goal (understanding the meaning of the text). This is **cognition**.
- The **meta level** is where 'thinking about thinking' takes place. At this higher-order level, metacognitive strategies are used to make sure the learner reaches the goal they have set. To continue with the reading example, this would begin with the learner thinking about how well they have understood the paragraph they have just read. This is termed **monitoring**. If they are happy with their comprehension level they will continue reading. If not, they will perhaps re-read the paragraph, or decide to use a dictionary to help their understanding. These actions are called **control** processes, as they are changing the learner's cognitive processes or related behaviours, based on the monitoring feedback. This is **metacognition**.

Perkins (1992) defined **four levels of metacognitive learners**: tacit; aware; strategic; reflective. 'Tacit' learners are unaware of their metacognitive knowledge. They do not think about any particular strategies for learning and merely accept if they know something or not. 'Aware' learners know about some of the kinds of thinking that they do – generating ideas, finding evidence, etc. – but thinking is not deliberate or planned. 'Strategic' learners organise their thinking by using problem solving, grouping and classifying, evidence seeking, decision making, etc. They know and apply the strategies that help them learn. 'Reflective' learners are not only strategic about their thinking but they also reflect upon their learning while it is happening, monitoring the success of any strategies they are using and then changing them as appropriate.

What other terms are associated with metacognition?

- **Self-regulated learning** is a broader term, encompassing cognition, metacognitive knowledge, metacognitive regulation and the motivation necessary to employ these strategies successfully (EEF, 2019).
- **Metamemory** – the metacognitive aspects of learning and memory (Nelson & Narens, 1990).

What are the benefits of metacognition?

- Metacognitive practices help learners to plan, monitor and evaluate their own progress and **take control of their learning** as they read, write and solve problems in the classroom.
- Research indicates that metacognition is a **powerful predictor of learning**. Metacognitive practices make a unique contribution to learning over and above the influence of cognitive ability. The implication of this research is that improving a learner's metacognitive practices may compensate for any cognitive limitations they may have (Veenman, Wilhelm & Beishuizen, 2004; Wang, Haertel & Walberg, 1990).
- Metacognitive practices have been shown to **improve academic achievement** across a range of ages, cognitive abilities and learning domains. This includes reading and text comprehension, writing, mathematics, reasoning and problem solving, and memory (Dignath & Buttner, 2008; EEF, 2019; Hattie, 2009).
- Metacognitive skills can help students to **transfer** what they have learnt from one context to the next, or from a previous task to a new task. The teacher can support this by explaining how what has been learnt from one task can be applied to the next.

What are the misconceptions of metacognition?

- **Metacognition is always deliberate**. Many metacognition researchers highlight the **conscious**, **deliberate** nature of metacognition. An alternative approach is to say that less conscious, automatic processes are also metacognitive. For example, a learner may check work for errors as they write, out of habit, with little awareness that they are doing so until an error is identified. The notion of automatic or **implicit metacognition** may cause further difficulties in distinguishing cognitive from metacognitive processes. However, it has led to more sophisticated models of metacognition, particularly in the area of metacognition in young children (Whitebread et al., 2009).
- **Metacognition is for older students**. In contrast to the view that metacognitive skills emerge at the age of 8 to 10 years old, Veenman & Spaans (2005), Whitebread & Pino-Pasternak (2010) and Larkin (2010) document a number of studies which indicate evidence of **young children's metacognitive abilities**. Findings include children as young as 18 months demonstrating error-correction strategies, 5 to 6-year-old children showing understanding of memory processes, and 3 to 5-year-olds exhibiting a wide range of verbal and non-verbal indicators of metacognitive processes in nursery and reception classrooms. These studies demonstrate that although young children may not be able to describe the metacognitive processes they are exhibiting, it does not mean that these processes are not occurring.

Practical tips:

How can schools make the best use of metacognition?

- Prioritise **professional development** in metacognition. There should be an explicit focus on teaching both cognitive and metacognitive techniques, and how to create a learning environment that supports the development of metacognitive skills and motivation. Encourage teachers to work together and **share practice** that promotes the development of metacognitive abilities in the classroom. For example, a group could meet regularly to reflect on a reading about metacognition or to share their experiences of implementing a new strategy.
- Support teachers in **encouraging metacognitive practices** at school. For example, exam wrappers are worksheets that learners complete before and/or after they receive test feedback. These include questions to help learners to reflect on the processes of planning, monitoring and evaluation when preparing for and sitting the test.



- Embed metacognitive strategies in **high-quality subject teaching** rather than as decontextualised generic skills training (EEF, 2019).
- Involve the whole school community in **promoting metacognitive talk**. Monitoring and evaluating performance and using learning strategies effectively is not only helpful in the classroom, but also in the wider school and beyond.
- **Evaluate the impact** of new strategies that are implemented, whether these are tried across the whole school or by individual teachers or departments (see *Getting Started with Evaluating Impact*).

How can teachers make the best use of metacognition?

- Make **learning goals explicit** and help students to plan strategies and ways of monitoring their progress towards achieving these goals. For example, encourage **self-assessment** against learning goals and redrafting of work as necessary to reach these goals.
- Help students to understand their mid- and long-term goals. As well as metacognitive knowledge and regulation, learners need to employ motivation strategies such as **deferred gratification** to make sure they learn successfully (EEF, 2019).
- Plan for **progression** in the teaching of new metacognitive strategies, starting with activating prior knowledge and explicit strategy instruction, and ending with independent practice and structured reflection (EEF, 2019). Try to keep learners within their zone of proximal development (ZPD) – see *Education Brief: Active learning*. Scaffolding should be gradually reduced so that eventually learners are able to employ the metacognitive strategy independently. Learners should also be able to choose which strategy to employ in a new context, or when another strategy is not working.
- **Model** the use of metacognitive strategies by thinking aloud. This could be related to metacognitive knowledge, e.g. What do I know about this task? Have I done a task like this before? Which strategies worked in the past on a task like this? Or, **metacognitive talk** could be related to metacognitive regulation, e.g. the teacher talking aloud while monitoring and evaluating what they are doing. Similarly, model the **transfer** of strategies across different domains of the school curriculum. For example, what strategy have I learnt in mathematics that would help me with this problem in geography?
- Try **reciprocal teaching** in reading. This is one of the most well-known reading interventions that uses a metacognitive approach (Palincsar & Brown, 1984). This involves teachers working with small groups of learners and modelling the use of four key strategies: summarising, questioning, clarifying and predicting. The students are then asked to teach these strategies to other students.
- Use **artefacts or visual resources** to support younger children in planning, monitoring and evaluating their learning. For example, involve learners in creating 'photo-cues' – photographs of learners undertaking different learning processes – and discuss what is happening and why (Tarrant & Holt, 2016).
- Teach the **language of metacognition** by using word walls or banks (Tarrant & Holt, 2016). Make sure that the language is embedded in high-quality subject teaching.
- When **debriefing** a cognitive activity, also seek opportunities to encourage reflection and evaluation about the metacognitive strategies used.

How is Cambridge supporting schools with metacognition?

- **Syllabus design and development** is informed by research evidence about metacognition and its impact on teaching, learning and assessment. We always aspire to make sure our exams require learners to use their metacognitive skills and to apply their thinking to new contexts. As such, the synoptic nature of our syllabuses and assessment requires students to understand the whole subject rather than simply individual modules. For example, our suite of Global Perspectives courses have been designed with tools to support learners in the process towards metacognition.
- **Online resources** such as *Getting Started with Metacognition* provide teachers with new ideas and approaches that link theoretical understanding with practical classroom application.
- **Training** such as our Enrichment face-to-face and online workshops on metacognition provide the opportunity for teachers to develop their metacognitive practices further.
- **Cambridge Professional Development Qualifications (PDQs)** have been designed to encourage and support metacognitive practices in Programme Leaders and candidates.

Where can you find more information?

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- Whitebread, D., Coltman, P., Pasternak, D. P., Sangster, C., Grau, V., Bingham, S., et al. (2009). The development of two observational tools for assessing metacognition and self-regulated learning in young children. *Metacognition and Learning*, 4, 63–85.
- Whitebread, D. and Pino Pasternak, D. (2010). Metacognition, self-regulation & meta-knowing. In K. Littleton, C. Wood, and J. Kleine Staarman (Eds.), *International Handbook of Psychology in Education* (pp. 673–712). Bingley, UK: Emerald.
- Information on Cambridge Professional Development Qualifications can be found at: **www.cambridgeinternational.org/pdq**
- Getting Started with Metacognition and Getting Started with Evaluating Impact are available on our website at: **www.cambridgeinternational.org/getting-started**

Acknowledgement: Teaching & Learning Team, Cambridge International.

Learn more! If you would like to know more about Cambridge Training please email **info@cambridgeinternational.org** or visit **www.cambridgeinternational.org/events** or contact Customer Services on **+44 (0)1223 553554**

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CAMBRIDGE
International Education

Fees list: USA

October 2025 to September 2026

Introduction

In this list you will find our:
Our registration year runs from 1 October to 30 September every year. In this fees list, we refer to 'Cambridge schools' – these are schools, colleges or any other organisation registered to offer our programmes and qualifications. For the Cambridge Early Years programme we refer to 'centres'.

In this list you will find our:

- application fees
- Cambridge Pathway programme fees for:
    - Cambridge Early Years
    - Cambridge Primary
    - Cambridge Lower Secondary
    - Cambridge Upper Secondary
    - Cambridge Advanced
- Cambridge Professional Development Qualification (PDQ) fees
- Per learner registration fees for online schools
- administration fees.

Customer notice: As you may be aware we have been undertaking customer research to review our pricing structures to best support schools and learners. This research will help inform work on improvements to our offer from October 2026. We plan to share further updates with customers over the coming year.

Registering as a Cambridge International School or Cambridge Early Years Centre

Before you can offer our programmes and qualifications you must go through our approval process. This includes an approval visit, where a Cambridge representative will visit your school or centre to understand your plans and help you to register. The following application fee will apply to cover this process. The visit may be conducted remotely or in person.
We will refund a portion of the application fee if a school or a centre does not meet our standards. We keep the remainder of the fee to cover the cost of the application process.
If we need to conduct a visit to assess a school or centre's ability to extend the programmes they offer, or if a school is extending to offer our programmes online, a programme extension application fee will apply.

	US DOLLAR ($)
Application fee	3,822.00
Refund following an unsuccessful approval visit	1,274.00
Programme extension application fee	1,911.00

Programme fees

Following a successful application, schools and centres pay a yearly programme fee to access a programme. Additional programmes may be included subject to another approval process. The table below shows what programme can be included at no extra cost. For example, if a school pays the Cambridge Primary programme fee, they could offer the Cambridge Lower Secondary programme without paying an additional programme fee.

What can be included (subject to successful application)

	Cambridge Early Years programme fee	Cambridge Primary programme fee	Cambridge Lower Secondary programme fee	Cambridge Upper Secondary & Advanced programme fee	Cambridge Professional Development Qualifications programme fee
Cambridge Early Years	•				
Cambridge Primary		•	•		
Cambridge Lower Secondary		•	•	•	
Cambridge Upper Secondary				•	
Cambridge Advanced				•	
Cambridge PDQ	•	•	•	•	•

Cambridge Early Years

Programme fee	US DOLLAR ($)
Centres that do not offer other programmes of the Cambridge Pathway will pay:	
Centres renewing their registration, or registering for the first time before 31 Dec	3,273.00
Centres registering for the first time part way through the registration year:	
from 1 Jan to 31 Mar	2,455.00
from 1 Apr to 30 Jun	1,637.00
from 1 Jul to 30 Sep	819.00
Centres that offer other programmes of the Cambridge Pathway will pay:	
Centres renewing their registration, or registering for the first time before 31 Dec	1,965.00
Centres registering for the first time part way through the registration year:	
from 1 Jan to 31 Mar	1,474.00
from 1 Apr to 30 Jun	983.00
from 1 Jul to 30 Sep	492.00

Cambridge Primary and Cambridge Lower Secondary

Programme fee	US DOLLAR ($)
Schools renewing their registration, or registering for the first time before 31 Dec	5,515.00
Schools registering for the first time part way through the registration year:	
from 1 Jan to 31 Mar	4,137.00
from 1 Apr to 30 Jun	2,758.00
from 1 Jul to 30 Sep	1,379.00

Cambridge Upper Secondary and Advanced

Programme fee	US DOLLAR ($)
Schools renewing their registration, or registering for the first time before 31 Dec	11,302.00
Schools registering for the first time part way through the registration year:	
from 1 Jan to 31 Mar	8,477.00
from 1 Apr to 30 Jun	5,651.00
from 1 Jul to 30 Sep	2,826.00

Cambridge Professional Development Qualifications (Cambridge PDQs)

Registered Cambridge schools: access to the Cambridge PDQ programme is included in the Cambridge Primary, Cambridge Lower Secondary, and the Cambridge Upper Secondary and Advanced programme fees following a successful approval application.

Programme fee	US DOLLAR ($)
Schools renewing their registration, or registering for the first time before 31 Dec	11,302.00
Schools registering for the first time part way through the registration year:	
from 1 Jan to 31 Mar	8,477.00
from 1 Apr to 30 Jun	5,651.00
from 1 Jul to 30 Sep	2,826.00
Online Programme Leader Course Fees	
Online Programme Leader Induction course (11 weeks)	447.65
Online Programme Leader Extension course (6 weeks)	246.25
Online Programme Leader Induction course with delivery materials (from Oct 2025)	593.25
Online Programme Leader Extension course with delivery materials (from Oct 2025)	326.30
Resubmission of the programme plan and rationale for Online Programme Leader courses	120.90 per module

Qualification fees (per exam entry)	
PDQ Certificate (Module 1) – Syllabuses starting with the number 6	421.00
PDQ Certificate (Module 1) – Syllabuses starting with the number 5	484.20
PDQ Diploma (Module 2) – Syllabuses starting with the number 6	252.60
PDQ Diploma (Module 3) – Syllabuses starting with the number 6	252.60
PDQ Diploma (Module 2 + 3) – Syllabuses starting with the number 5	505.20

Please note the Annual Waiver threshold that relates to programme fees charged in October 2026 is being reviewed. The Annual Waiver threshold that relates to programme fees charged in October 2025 can be found in our 2024/25 fees lists. Please see the customer notice in the Introduction section of this document for more details on the customer research and review we are undertaking.

Per learner registration fees for online schools

Cambridge schools registered as online or approved to offer Cambridge Primary, Lower Secondary or Upper Secondary and Advanced programmes online must pay a learner registration fee per student. We will invoice you for this fee based on the data you provide to us. If you do not submit your learner numbers by the due date, we will charge a 30 per cent increase on the learner registration fee. The amount you must pay at this increased rate will be based on student numbers you submitted the previous year. We cannot adjust your invoice once we have issued it. If you do not submit your learner numbers for two years in a row, we may withdraw your centre status and terminate our Agreement with you.

	US DOLLAR ($)
Schools renewing their registration, or registering for the first time before 31 Dec	46.50 per learner
Schools registering for the first time part way through the registration year:	
from 1 Jan to 31 Mar	34.90 per learner
from 1 Apr to 30 Jun	23.25 per learner
from 1 Jul to 30 Sep	11.65 per learner

Administration fees

You can find fees for results services, post-results services and late entries below. After the final entry closing date, we will charge late fees for any new entries you make, as well as for any entry amendments or syllabus changes. For more information about these services please see the Cambridge Handbook.

	US DOLLAR ($)
Late entries (in addition to the normal syllabus fee)	73.55 per entry, per subject
Very late entries (in addition to the normal syllabus fee)	183.90 per entry, per subject
Results services	
Duplicate results – whole school	103.10
Duplicate results – broadsheet only	68.90
Duplicate results – additional fee for despatch by courier	89.60
Priority results information	99.15
Priority results information – additional fee for extra copy	27.60
Priority results information – additional fee for despatch by courier	89.60

Fees list: USA – October 2025 to September 2026 (continued)

Post-results services	
Certifying statement search fee	99.15
Certifying statement – additional fee for extra copy	27.60
Certifying statement – additional fee for despatch by courier	89.55
Certifying statement – additional fee for authentication per statement	351.95
Replacement certificate – candidate/centre details change requested after the issue of certificates	99.15
Replacement certificate – additional fee for despatch by courier	89.55
Replacement statement of results – candidate/centre details change requested after the issue of statements of results	99.15
Replacement statement of results – additional fee for despatch by courier	89.55
Verification of results	44.00
For Enquiries about Results (EARs) services for Cambridge IGCSE™ and International AS & A Level	*See table below*
Recalculation of Cambridge ICE or the Cambridge AICE Diploma (non-refundable fee)	
For the first five candidates	238.75
For each additional candidate	24.00
EARs service for Cambridge Professional Development Qualifications: Service 3 – Review of marking and clerical re-check, with detailed report on syllabus assignment (fee per candidate)	137.70
Appeals against enquiries about exam results outcomes Stage 1	343.75
Appeals against enquiries about exam results outcomes Stage 2	412.15

Enquiries about results (EARs)			US Dollar ($)
		Cambridge IGCSE™	**Cambridge International AS & A Level**
Service number	**Description**	**Component fee**	**Component fee**
1	Clerical re-check (fee per candidate)	37.35	41.40
1S	Clerical re-check with a copy of the script (fee per candidate)	81.40	82.50
2	Review of marking and clerical re-check (fee per candidate)	86.80	103.10
2S	Review of marking and clerical re-check with a copy of the script (fee per candidate)	130.80	148.70
5	Re-moderation of the school's coursework marks for a component, together with a report on the assessment of the candidates' coursework (fee per cohort)	495.30	573.50
9	Report on the work of a group of candidates Note: The report is for the information of teachers only and does not involve any review of marking For the first five candidates: For each additional candidate up to maximum 15:	 452.90 63.10	 507.90 82.60

10	Review of selection of evidence – for portfolio of evidence route A review of the choice of the pieces of evidence included in the candidate's portfolio to check that the pieces of evidence chosen meet the criteria for selection in our published portfolio of evidence guidance (fee per candidate)	173.60	206.10

Other fees

Fees for publications, merchandise, consultancy on curriculum, assessment design and school improvement are available on request.

Refund of fees

We only refund fees if you let us know about the withdrawal of a candidate before the published entry closing date. We issue refunds after the end of the exam series. More information is in the Cambridge Handbook at www.cambridgeinternational.org/examsofficersguide

Taxation

Fees are net of local taxation. All fees are payable without deduction for any taxes; all sums payable to us shall be increased to the extent necessary to provide us with the same net amount we would have received if no such taxes had been applicable to those fees.

Invoicing and payment

We email invoices to your designated Finance contact at your school or centre. To update or change this information, please contact us at info@cambridgeinternational.org

Learn more

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Our fees: Learn more at www.cambridgeinternational.org/why-choose-us/join-cambridge/our-fees
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Cambridge Upper Secondary: Learn more at www.cambridgeinternational.org/uppersecondary
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Cambridge Assessment International Education

Interactive

Learner Guide

Cambridge International AS Level Global Perspectives and Research 9239

For examination from 2023



Cambridge Pathway

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About this guide

This guide explains what you need to know about your Cambridge International AS Level Global Perspectives & Research 9239 course and examinations.

This guide will help you to:

- ✓ understand what skills you should develop by taking this AS Level course
- ✓ understand how you will be assessed
- ✓ understand what we are looking for in the answers you write and the coursework you produce.

Following a Cambridge International AS Level programme will help you to develop abilities that universities value highly, including a deep understanding of your subject; higher order thinking skills (analysis, critical thinking, problem solving); presenting ordered and coherent arguments and independent learning and research.

Studying Cambridge International AS Level Global Perspectives & Research will help you develop a set of transferable skills. These include critical thinking, deconstructing and differentiating arguments, evaluating claims and developing strong reasoning. Learners can apply these skills across a range of subjects and complex real-world issues. These skills will equip you well for progression to higher education or directly into employment. In particular, studying Cambridge International AS Level Global Perspectives & Research will help you to be:

confident, explaining, analysing and evaluating global issues and communicating arguments

responsible, researching extensively and selecting suitable material from a globally diverse range of sources, directing their own learning

reflective, developing a critical awareness of their personal standpoint and how that impacts on their response to different opinions and diverse ways of thinking

innovative, thinking creatively to propose solutions to issues

engaged, working collaboratively to develop each individual's potential in pursuit of a common goal.

1. Syllabus content - what you need to know

This section gives you an outline of the syllabus content for this course. The aims of the course are to help you to:

- acknowledge and understand the diversity of perspectives on global issues
- develop the ability to evaluate claims and evidence
- make independent judgements supported by reasoning and evidence, and understand the importance of justifying your own opinions
- become an effective researcher, using appropriate sources to support judgements and understanding of research processes
- develop your ability to reflect on your own learning and judgements and on your work with others
- develop a range of effective written and spoken communications skills.

Make sure you always check the latest syllabus, which is available from our public website.

Prior knowledge

We recommend that learners starting this course should have completed a course in English equivalent to Cambridge IGCSE™ or Cambridge O Level First Language English.

Skills overview

As a Cambridge AS Level Global Perspectives & Research learner, you will have opportunities to gain and apply a range of skills to support you in these challenges, including:

- thinking skills of analysis, evaluation and synthesis through considering a range of global topics
- independent enquiry and learning about appropriate research methods and methodology
- developing research, reasoning and communication skills systematically, using an approach called the Critical Path
- working both independently and collaboratively, with respect for and understanding of different cultures and perspectives.

Cambridge International AS Level Global Perspectives & Research has a strong focus on the acquisition of skills rather than the learning of knowledge. You will develop skills that will be useful for further study, work and as an active citizen of the future.

The Critical Path

The Critical Path is an approach to teaching and learning that will provide you with a systematic way of developing the skills of research, reasoning and communication. By using the Critical Path you will develop the ability to deconstruct and reconstruct arguments about global issues through personal research and interrogation of evidence.

Deconstruction is the first step on the Critical Path and involves breaking down topics into smaller areas through analysis. At this stage in the process you might ask questions such as:

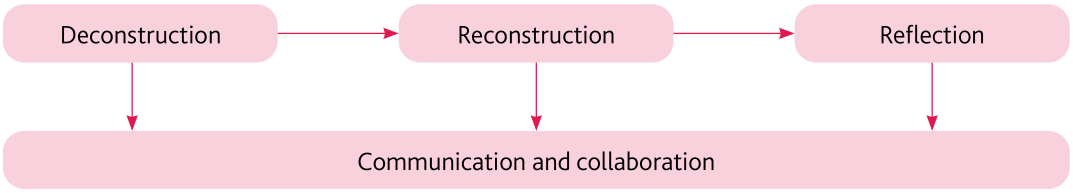
- what issues arise from this topic?
- what are the different points of view?
- who is saying what, where and why are they taking that point of view?

Reconstruction is the second step on the Critical Path and involves synthesising or combining different arguments and evidence into coherent perspectives.

Reflection is the final step on the Critical Path and at this point you will consider what you think and why, and how has your viewpoint changed. During the reflection stage you will also reflect upon your own performance as an effective researcher and collaborative team member.

The Critical Path is underpinned by the skills of communication and collaboration. You will be required to communicate in different ways such as written and oral communication. Collaboration may be seen as a form of interpersonal communication arising from team work.

The Critical Path



The Critical Path is best seen as a sequence of repeated steps, which need to be practised. Each time you repeat the process you will be improving your ability to apply the transferable skills that are at the heart of the Global Perspectives & Research course.

2. How you will be assessed

Cambridge International AS Global Perspectives & Research makes up the first half of the Cambridge International A Level course and provides a foundation for the study of Global Perspectives & Research at Cambridge International A Level.

About the examinations

You will be assessed through the completion of three compulsory components:

- Component 1 – Written Exam
- Component 2 – Essay
- Component 3 – Team Project.

About the components

Component	Time and marks	Details	Percentage of qualification
Component 1 Written Exam	1 hour 30 minutes 45 marks	You will answer three compulsory questions based on sources provided with the exam paper. Question 1: 5 marks Question 2: 15 marks Question 3: 25 marks	36% of the AS Level
Component 2 Essay	40 Marks (your teacher will give you the deadline date)	You will write a 1750–2000 word essay based on a global issue of your own choice arising from topics studied during the course. You must choose an essay title that is a single question. Your choice of essay question must provide opportunities to develop globally contrasting perspectives.	32% of the AS Level
Component 3 Team Project	40 Marks (your teacher will give you the deadline date)	You will work in teams of two to five members to identify a local problem that has global relevance. Each team member researches the problem from a distinct perspective and suggests a solution based on their research findings. **Presentation** (30 marks) You will present your individual research and proposed solution to the problem in a presentation (maximum of 10 minutes in length). **Reflective paper** (10 marks) You will write a reflective paper (maximum of 800 words) focusing on your experience of team work and the learning gained from completing the project.	32% of the AS Level

About each component

It is important that you understand the requirements of each component and how you should approach them. A general introduction is below:

Component 1 – Written Exam

This is a formal examination. You will be provided with two source documents both of which will be approximately 500 words in length. The source documents may present different perspectives on an issue of global significance. You should spend 15 minutes reading the documents. You must answer all the questions on the exam paper.

Note that for the example below Q1(a) is worth 3 marks and Q1(b) worth 2 marks. On the exam paper the marks could also be awarded as Q1(a) being worth 2 marks and Q1(b) being worth 3 marks.

Question 1 (5 marks) is a structured question based on the two source documents. You are required to read both sources and answer short questions that demonstrate AO1 skills. An example of a Question 1 is below:

> **1 (a)** Identify **three** development projects that have been successful in Malawi according to the author of Document A. **[3]**

To answer Question 1a, you will need to refer to Document A.

This is a short-answer question asking you to identify three elements of Document A.

One sentence for each identification is enough, there is no requirement to explain.

The answer must come from Document A and not your own knowledge.

> **1 (b)** Identify **two** ethical problems associated with foreign aid according to the author of Document B. **[2]**

To answer Question 1b you will need to refer to Document B.

This is a short-answer question asking you to identify two elements of Document B.

One sentence for each identification is enough, there is no requirement to explain.

The answer must come from Document B and not your own knowledge.

Question 1 will always have two parts, one worth two marks and the other worth three marks. You should spend around 8 minutes answering Question 1.

Question 2 (15 marks) requires a longer response based on Document A. You are required to focus on the evidence in the document and demonstrate AO1 skills. An example of a Question 2 is below:

> **2** Assess the strengths and weaknesses of the evidence used by the author of Document A to support her argument that foreign aid programmes benefit sub-Saharan Africa.
> In your answer, explain the impact of the evidence on the author's perspective. **[15]**

Question 2 requires you to refer to both strengths and weaknesses of evidence.

You should make explicit reference to Document A when answering the question.

In each paragraph you should:

- identify evidence from Document A
- explain why the evidence is strong or weak (a piece of evidence may contain both strengths and weaknesses)
- explain how the strength or weakness will impact the overall argument put forward by the author.

Question 2 will always refer to Document A and will always be focused on evidence. You should spend around 25 minutes answering Question 2.

Question 3 (25 marks) requires a longer, essay response based on the two source documents. You are required to focus on the arguments and perspectives given in the documents and provide a reasoned judgement, demonstrating both AO1 and AO3 skills. An example of a Question 3 is below:

> **3** The two authors present different arguments and perspectives about foreign aid programmes. Evaluate the arguments and perspectives of both authors. In your answer, include a reasoned judgement about whether one argument is more convincing than the other. **[25]**

Question 3 requires you to identify, analyse and compare the perspectives of each document and the key components of their respective arguments.

You are also required to evaluate the arguments presented before arriving at a final judgement as to which document is stronger or more convincing.

You should make explicit reference to both documents when answering the question.

This question also assesses your communication skills and requires that you present a clear, well-structured and logical argument.

In each paragraph you should:

- identify key components of argument or evidence from Document A or B
- explain why this key component makes Document A or B more convincing than the other. It is a good idea to arrive at intermediary conclusions throughout your answer before presenting your final conclusion.

Question 3 will always require you to evaluate Document A and Document B in order to arrive at a judgement as to which author's argument is more convincing or stronger. You should spend around 42 minutes answering Question 3.

Component 2 – Essay

You will devise your own title question that addresses an issue that arises from one of the topics you have studied.

The essay should be between 1750–2000 words.

In the essay you will demonstrate AO1, AO2 and AO3 skills.

You will need to devise a question that sets up a debate between two contrasting perspectives.

Your essay should be informed by varied research using sources that are globally diverse.

You should make links between your source materials to build two coherent perspectives.

The implications of your question should be considered with reference to a globally diverse range of locations.

You must critically evaluate your source material and justify its appropriateness but also recognise any weaknesses it may contain.

After critically evaluating both perspectives presented you should present a conclusion that follows on logically from the debate presented.

Your essay should be clearly communicated and well-structured and all sources used should be clearly cited and referenced in a bibliography.

Your response should be balanced and each perspective treated fairly and evenly.

You should reflect on the work carried out and how engaging with contrasting perspectives has shaped your viewpoint.

Finally, you should make a specific suggestion for further research that is relevant to the essay presented.

Component 3 – Team Project

You will work in teams of two to five members to identify a local problem that has global relevance. The team must outline their local problem in a single statement that allows different team members to address the problem from different perspectives.

You will record an individual presentation (maximum of 10 minutes in length) that argues for your distinct solution to the problem chosen by the team.

You will also write an individual reflective paper (maximum 800 words).

Presentation

Your presentation should offer a full analysis of the team's problem which is supported by local and global research.

Your presentation will demonstrate AO1 and AO3 skills.

Your presentation should both evaluate and make links between source materials.

You will need to demonstrate the effectiveness of your proposed solution with reference to supporting evidence.

Your presentation should be coherent and well-organised, making clear links between points as your argument progresses.

Your presentation should use methods of visual representation that support the argument and evidence.

You should use language effectively making the presentation engaging for the audience.

Reflective paper

You must evaluate the effectiveness of your team's collaboration, considering which aspects worked well and which aspects were less successful.

You will demonstrate AO2 skills.

You should also reflect on what you have learned from the project, this should include; the impact of other perspectives on your viewpoint; what you have learned about the issue and what you have learned about working as part of a team.

3. What skills will be assessed

The examiners take account of the following skills areas (**assessment objectives**) in the examinations:

- AO1 Research, analysis and evaluation
- AO2 Reflection
- AO3 Communication

You will find explanations of some words in the **Glossary** at the end of this guide.

Assessment objectives (AO)	What does the AO mean?	
AO1 Research, analysis and evaluation	• identify and analyse arguments, evidence and perspectives • synthesise and evaluate arguments, evidence and perspectives • locate through research a range of appropriate sources and perspectives • use research to support judgements about arguments and perspectives	Find a diverse range of relevant research material. Through analysis identify key arguments and evidence. Make judgements about the quality and appropriateness of research material. Make links between source materials to develop broad and coherent perspectives. Conclusions and solutions should be supported by the research materials selected.
AO2 Reflection	• acknowledge different perspectives and evaluate their impact on the learner's own standpoint • consider the extent and limits of the learning and research that has been undertaken • reflect on and evaluate the effectiveness of collaboration with others	Reflect upon how your viewpoint has been impacted by engaging with different perspectives. Reflect upon what you have learned, this could be knowledge or skills. Reflect upon the limitations of your research and consider how it might be improved or further developed. Reflect upon the process of working as a team, considering what worked well and what aspects could have been improved.
AO3 Communication	• produce structured, written arguments using appropriate terms and referencing where applicable • produce a structured presentation using language appropriate for the audience • communicate information visually in order to engage an audience	Organise essays and longer examination responses in a logical and balanced manner. Write a conclusion that reaches a supported judgement. Ensure that your presentation is well-organised and that it clearly communicates the argument you are presenting. The combination of oral and visual elements should complement one another and engage the audience rather than confuse.

It is important that you know the different weightings (%) of the assessment objectives, as this affects how your work will be assessed.

Assessment objective	Component 1 %	Component 2 %	Component 3 %	Weighting at AS Level %
AO1 Research, analysis and evaluation	89	63	40	65
AO2 Reflection	-	22	25	15
AO3 Communication	11	15	35	20
Total	100	100	100	100

4. Command words

The table below includes command words used in the assessment for this syllabus. The use of the command word will relate to the subject context.

Command word	What it means
Assess	make an informed judgement
Compare	identify/comment on similarities and/or differences
Contrast	identify/comment on differences
Demonstrate	show how or give an example
Develop	take forward to a more advanced stage or build upon given information
Evaluate	judge or calculate the quality, importance, amount, or value of something
Explain	set out purposes or reasons / make the relationships between things evident / provide why and/or how and support with relevant evidence
Identify	name/select/recognise
Justify	support a case with evidence/argument

Phrases such as 'To what extent…?' and 'Make an overall judgement' may also be seen in the assessment for this syllabus.

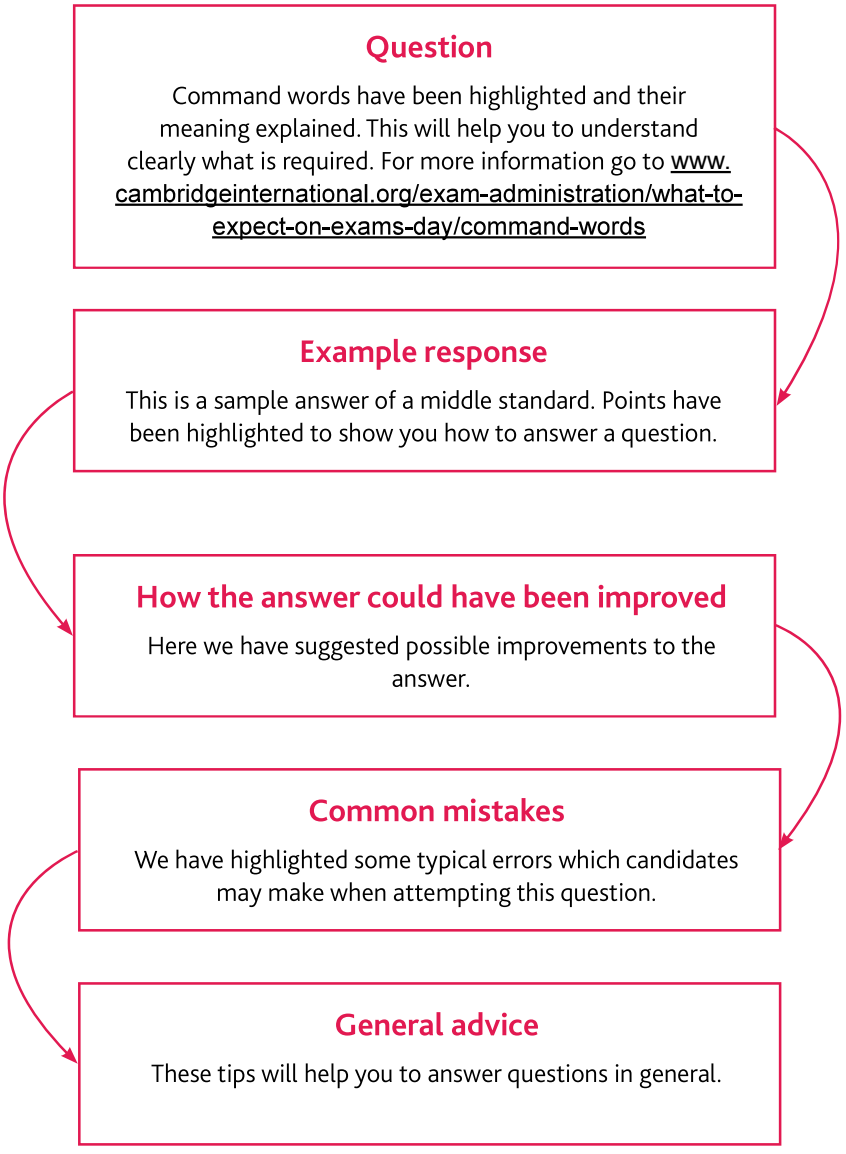
As well as understanding the command words for each question, you should also make yourself aware of how many of your marks are for AO1, AO2 and AO3 skills so that you answer the question or complete the project appropriately.

5. Example response

This section takes you through an example essay for Component 2. It will help you to understand what is required when researching and writing your essay. Understanding the different criteria you will be assessed against will help you to structure your essay more effectively.

All information and advice in this section is specific to the example essay being demonstrated. It should give you an idea of how your essay might be viewed by an examiner. In your own essay, you will need to focus carefully on the issue you have chosen to research.

This section is separated as follows:



Component 2 – Essay

Example response	Examiner comments
Topic: *Human Rights* *Are governments effectively working towards limiting hate crimes?* 1 *Imagine participating in a protest and all of a sudden paint is being thrown all over you. That is exactly what happened to Vitalina Koval. She was participating in a protest on International Women's Day on March 2018 in Ukraine when six people from a radical group called "Karpatska Sich" drenched her in red paint. "The paint ended up getting into her eyes and caused chemical burns. Vitalina was attacked for speaking up for her and other's rights at the protest." (Amnesty, 2018, 2) When questioned she stated "I've been attacked so many times but I'm not afraid anymore". What Ms. Koval experienced was a hate crime.* 3 *Hate crime can be defined as "a criminal offence committed against a person, property, or society that is motivated, in whole or in part, by the offender's bias against a race, religion, disability, sexual orientation, or ethnicity/national origin." (National Institute of Justice, 2018, 4) Sadly, crimes like the one committed to Vitalina Koval happen all around the globe. In the United States, "more than 7,100 hate crimes were reported in 2017." (The Guardian, November 2018) In the United Kingdom, the number of hate crime victims reported in 2012 was 7,164. (Who is hosting This, 2019).* *However, the focus of this research is on the issue of whether governments are doing enough to limit hate crimes. It is important to look at what the different governments are doing to deal with the ethical issues associated with the hate crimes against the different religions; social issues, dealing with the LGBTQ+ community; and the cultural issues related to hate crime based on race. The research will be comparing the policies and actions of the different governments in the United States and the United Kingdom, 5 to see what each country is doing to solve the issue and whether the solutions are effective.* *In the United States, there are laws and acts against hate crime at the federal level but each state has its own local laws when dealing with specificities of hate crimes. The National Association for the Advancement of Colored People* 6	1 The title sets up a debate. There is clear potential for contrasting perspectives regarding how effective governments are at limiting hate crimes. 2 The citation is clear; however, the full reference is not easily found in the bibliography. 3 The introduction is presented in an engaging style but the reader as yet does not know what the debate will be about. 4 Again the citation is clear but the reference is not easily found in the bibliography; therefore, referencing is not accurate. (AO3) 5 Outlines the implications of the focal question. The debate is going to be located in the UK and the US. (AO1) 6 The candidate engages with a relevant source and demonstrates reasonable understanding. (AO1)

Example response	Examiner comments
(NAACP) is a non-profit organization that is working to secure equality of rights in order to eliminate discrimination against race. Their argument is that some states do not have comprehensive laws and four states (Georgia, Indiana, Utah, and Wyoming) do not have any hate crimes laws on the books and that needs to change in order to prevent hate crimes. They have stated that "Hate crime totals for the 10 largest cities rose for four straight years to the highest level in a decade". (NAACP, 2018) The above statement argument is credible because the information is coming from an organization that has been around since 1909 advocating for equality of rights. The president of the organization, Derrick Johnson, received training through fellowships with the Congressional Black Caucus Foundation, the George Washington University School of Political Management, and the Massachusetts Institute of Technology. In addition, he is a guest lecturer at Harvard Law School speaking about social movements and also a professor at Tougaloo College. His experience along with the reputation of the organization itself, allows his argument to be seriously taken into consideration. 7 Concurrently, 8 in the United Kingdom, a fact-checking charity organization, "Full Fact, reported that "There was a "clear spike in hate crime" around the time of the EU referendum," and racial and religious offences "were 44% higher in the month following the referendum result compared to the same month in the previous year." This data supports the argument that the government is not doing enough because hate crime rose substantially in the past year. (Full Fact, 2018) The information provided by this organization is considered reliable as they have established a reputation as being objective and without bias. 9 They do not take sides on any issue. Recently, the Guardian newspaper article of Mar 22, 2019, stated that "Anti Muslim hate crimes soared in the UK after the Christchurch shootings. 10 In New Zealand by almost "593%." (Vikram Dodd, 2019) While these sources have argued that government is not doing enough, others like (Home Office, 2018) have made the argument that "Trends over the longer term suggest reductions in the number of hate crime incidents." They	7 The candidate justifies the appropriateness of the source material. The provenenace of the organisation and the credibility of D Johnson are used to support the appropriateness of using this source. (AO1) 8 The use of discursive markers, such as concurrently, help structure the essay and guide the reader through the debate. (AO3) 9 Here the justification of the source is merely assertive. The reader is not told why objectivity makes the source appropriate. 10 By linking the evidence from the 'Full Fact' with the evidence from the 'Guardian' (written by Dodd) the candidate is synthesising source material into a more coherent perspective. The referencing of Dodd is effective and the citation is easily found in the bibliography – see point 23. (AO1/AO3)

Example response	Examiner comments
have indicated that the recent laws being implemented are helping to limit hate crimes.[11] Baroness Susan Williams of Trafford, Minister of State for Countering Extremism and Parliamentary Under Secretary of State, in an article, 'Government Launches New National Hate Crime Awareness Campaign' explained that government is serious about the subject and believes that a better understanding by the populace about what constitute hate crimes should result in tolerance and thus a decrease in this activity. Laws enacted in the UK like the Criminal Justice and Public Order Act Of 1994 and the Racial and Religious Hatred Act of 2006 have served to cover and includes more offences as hate crimes. (Baroness Susan Williams of Trafford, 2018)[12] The United States Department of Justice under President Obama signed into law on October 28, 2009 'Hate Crime Law'. Called The Hate Crimes Prevention Act, which "removed then existing jurisdictional obstacles to prosecutions of a certain race- and religion-motivated violence and added new federal protections against crimes based on gender, disability, gender identity, or sexual orientation". (Hate Crime Laws, 2019) The Act gives the justice department the power to investigate and prosecute anyone who chooses the victim of their crime based on race, colour, gender, disability, etc, etc.. This law is an expansion of the National Defense Authorization Act. Over many years, a number of laws against hate crimes have been created in the United States but unfortunately, there are still too many instances of such crimes.[13] Human Rights Campaign has taken the view that even though there are laws in place, hate crimes continue unabated. 'In 2017, 1,130 hate crimes were based on sexual orientation bias and 119 on gender identity bias. These numbers reflect a five percent increase in reporting of hate crimes motivated by sexual orientation bias and a four percent decrease in reporting of hate crimes motivated by gender identity bias. Hate crimes motivated by anti-religious bias increased 23 percent, largely driven by a 37 percent increase in anti-Jewish hate crimes. The FBI reported that anti-Black hate crimes increased by 16 percent, from 1,739 incidents in 2016 to 2,013 incidents in 2017. Every other racial and ethnic group also saw increases in the number of reported hate crimes in 2017.[14] (Human Rights Campaign, 2018)	[11] The essay moves to the contrasting perspective without a clear discursive marker. The strucuture of the essay is not helping the reader to follow the debate. (AO3) [12] The candidate continues to engage with a range of appropriate sources. However, the understanding of the source material is not always well-developed. (AO1) [13] More evidence is presented but there is no clear development of a perspective. It is not clear which perspective this evidence is supporting. [14] The evidence is relevant but it is presented without explanation. The engagement with the source material lacks development. (AO1)

Example response	Examiner comments
It is a fair point to conclude that both governments have made efforts to limit hate crimes. However much more needs to be done to effectively tackle this monster. Many hates crimes begin with hate speech and this is one area which is complex. In the United States, the first amendment allows for freedom of speech and many people use this right to defend hate speech. They complain that their right to free speech is being curtailed. The government is sometimes conflicted trying to protect free speech and protecting the victims of hate speech. 15	15 There is some limited evaluation of one of the perspectives. Phrases such as 'tackle this monster' are not appropriate and do not demonstrate strong communication skills.
In recent times the rhetoric by the government has not been helpful in limiting hate crimes even though there are still laws in place. With the popularity of smartphones and other electronic devices, we are seeing first-hand the many instances of hate speech and crimes. We are also witnessing the results of such cases brought before the courts. In most cases, there is further public outrage due to the many not guilty verdicts. Today, more than ever before, the media is highlighting these cases of hate crime, people are more aware, more involved in the discussion but hate crimes continue. 16	16 The candidate attempts to consider the implications of the question in terms of communication technology developments. However, there is no citation and the claim made is merely an assertion.
After assessing both sides of the argument put forward, the sad truth is, hate crimes are still happening, far too often and the numbers are frightening. I appreciate the fact that new laws are being made to educate the people but more needs to be done to effectively limit hate crimes. People in both countries live in a climate of hatred. There are too many inflammatory statements especially by those in leadership positions and the intolerance in our discussions only serves to further divide us. There must be a condemnation of all forms of hatred and one of the top priorities of each country's government must be addressing hate crimes. 17	17 The critical comparison of contrasting perspectives is limited with very little engagement with the perspective that governments are being effective.(AO1) The essay has not demonstrated balance in considering contrasting perspectives. (AO2)
When I first started the research, I immediately took the position that more can be done to limit hate crimes. But, as I found information regarding the number of laws, acts, and bills being considered, I became conflicted. Although the argument put forward by Baroness Williams was well supported with evidence it was in the end not enough to change my initial opinion. However, what really swayed me back to my original thought was the fact that yes, bills and acts have been passed but hate crimes continued to soar. 18	18 The essay has a reflective tone and the candidate considers the impact of engaging with contrasting perspectives on their personal viewpoint. (AO2)
This research is limited because the data regarding the number of hate crimes is not accurate. Unfortunately, the government has acknowledged that many hate crimes are not	

Example response	Examiner comments
reported so they are unable to determine an exact number committed each year. However, just because the information does not depict the whole story doesn't mean that the crimes that have been recorded aren't a problem. Based on the statistics given, everyone can agree that something needs to be done because hate crime should not become the norm for any civilized society. 19	19 There is some undeveloped evaluation of statistics in relation to hate crime. However, the intermediary conclusion is not explicitly linked to the question of how effectively governments are at addressing hate crimes. At this point the essay loses focus.
When looking at the global issue of hate crime, there are often more than one perspective to consider but it's important that we view all sides so as to arrive at a full understanding of the issues. One can argue that the United States could be viewed to support the perspective that the government is not effectively tackling hate crimes because cases are rising. Also, there are states that still don't have any hate crime laws. On the other hand, 20 the United Kingdom could be viewed to support the perspective that the government is becoming more effective by introducing the National Hate Crime Awareness Campaign. When all is said and done both can do more to limit hate crimes and the sooner, we find a solution, then we can achieve some measure of global peace. On the evidence presented I conclude that governments are not effectively tackling hate crimes and much more needs to be done. 21	20 The comparison of perspectives is more developed here but does not move beyond being descriptive. (AO1) The use of discursive markers such as, 'on the other hand' are useful, they let the reader know that there is a change of perspective. (AO3) 21 The final conclusion follows on logically from the preceeding essay. However, the candidate never seemed likely to arrive at any other conclusion given the weight of evidence and argument presented to support this particular perspective. (AO1)
Although the range of source material used was credible and relevant it was largely focused on the US and the UK and this is perhaps a limitation of my research. Though I did manage to include some references to New Zealand and Ukraine for the most part my essay lacked a globally diverse range of evidence. Further research that included more diverse countries would help in forming a more widely generalisable conclusion. It would be useful to explore how governments in Africa and Asia are tackling hate crimes so as to arrive at a more holistic conclusion. 22	22 The development of further research is effective. It arises explicitly from a weakness of the essay and is both relevant and well justified. (AO2)
Bibliography Dodd, V. 23 (2019, March 22). Anti-Muslim hate crimes soar in UK after Christchurch shootings. Retrieved from https://www.theguardian.com/society/2019/mar/22/anti-muslim-hate-crimes-soar-in-uk-after-christchurch-shootings Hate Crime. (n.d.). Retrieved from https://www.nij.gov/topics/crime/hate-crime/pages/welcome.aspx Hate Crime Laws. (2019, March 07). Retrieved from https://www.justice.gov/crt/hate-crime-laws	23 Here the candidate has correctly referenced the citation used in the essay – see point 10. (AO3)

Example response	Examiner comments
Hate Crime Online: Here's Everything You Need To Know In 2019. (2019, February 12). Retrieved from https://www.whoishostingthis.com/resources/hate-crime/ Human Rights Campaign. (2018, November 13). New FBI Statistics Show Increase in Reported Hate Crimes. https://www.hrc.org/blog/new-fbi-statistics-show-alarming-increase-in-number-of-reported-hate-crimes NAACP Sees Continued Rise in Hate Crimes, Legacy of Trump's Racism. (2018, June 30). Retrieved from https://www.naacp.org/latest/naacp-sees-continued-rise-hate-crimes-legacy-trumps-racism/ Office, H. (2018, October 31). Government launches new national hate crime awareness campaign. Retrieved from https://www.gov.uk/government/news/government-launches-new-national-hate-crime-awareness-campaign Office, H. (2018, October 16). Hate Crimes, England and Wales 2017/18. Home Office . Retrieved from https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/748598/hate-crime-1718-hosb2018.pdf Team, F. F. (2018, October 16). Hate crime in England and Wales. Retrieved from https://fullfact.org/crime/hate-crime-england-and-wales/ Vitalina Koval, LGBTI activist from Ukraine. (n.d.). Retrieved from https://www.amnesty.org/en/latest/campaigns/2018/06/vitalina-lgbti-activist-in-ukraine/	24 The referencing here is not effective. The citation in the essay reads Amnesty 2018 (see point 2) yet the listing in the bibliography is under the name Vitalina. (AO3)

Examiner comments

Overall this is typical of an essay that would gain a middle-range mark.

The essay successfully sets up a debate between two contrasting perspectives which is a fundamental requirement. The title question also raises an issue that has the potential for contrasting perspectives. However, the title refers to how, 'effectively' governments are working towards limiting hate crime and the notion of 'effectively' is never clearly defined. Consequently, the essay does lack some focus.

The implications of the question are explored within the geographical contexts of the US and the UK. The Component 2 Essay should consider the title question beyond the boundaries of one location. However, by locating the debate within just two culturally similar countries, the range is limited.

There is some implicit synthesis of source materials (see point 10). Candidates should not treat each of their source materials in isolation, building perspectives is very much about weaving arguments and evidence together into a coherent whole. The essay could have made clearer links between source materials.

There is a range of relevant source material used to support the perspectives. Throughout the essay several sources are referenced. The candidate partially engages with their material but in some cases does not move beyond presenting data. The link between the source material presented and the title question is not always clear. Having located the debate in the UK and

US understandably the range of source material does not cover diverse global contexts. This decision has prevented the essay from being awarded higher marks.

The essay evaluates the appropriateness of two of the sources used (see point 7). It would have been better to evaluate four sources, two from either side of the debate. The candidate has considered the provenance and credibility of the organisation and key personnel respectively. This has merit, but by only using two criteria to evaluate the appropriateness of the source this limits the range.

There is some comparison of perspectives (see point 20) but this needs further development and does not move beyond description. For higher marks the comparison should really examine the strengths and weaknesses of each perspective before arriving at a final judgement. The essay never really fully supports the perspective that governments are able to effectively tackle hate crimes and this has hampered the essay throughout. This should underline the importance of framing the title question carefully.

The essay has some strong reflective qualities. The impact of r esearch and contrasting perspectives on the candidate's viewpoint are clearly expressed. There is scope for some further detail but the reflective tone is good (see point 18). T he essay also demonstrates some well thought out further research that is clearly linked to the essay and arises out of the limitations of the research identified by the candidate (see point 22).

The essay does not demonstrate a high level of communication skills. The structure of the essay needs to be more balanced. There needs to be a more logical flow to the essay and the candidate needs to use clear discursive markers to guide the reader. That said the essay does present a debate between two contrasting perspectives that is on the whole understandable. Sources are cited throughout but the citations are not easily found in the bibliography. Therefore, referencing is present, but not effective.

How the answer could be improved

To be awarded a higher mark the essay needed to be more focused. A more considered title would have helped. A better title might have been, 'Can legislation be successful in limiting hate crime?'. This would have allowed the candidate to research countries where legislation has been successful in reducing hate crimes and contrasted those with countries where legislation has not reduced hate crimes. By researching different countries' approaches to the problem of hate crime the essay would have developed a global dimension. The original essay is too narrow in its outlook with the focus located within the US and the UK with just a fleeting reference to the Ukraine.

Another way to broaden the perspectives is to take a thematic approach. The syllabus identifies seven themes although you might come up with others. They are culture, economics, the environment, ethics, politics, science and technology. The issue of hate crimes could be explored through the themes of culture (cultural clashes in multicultural society), politics (what is the potential political fallout for leaders who impose new legislation), technology (how has the rise of social media increased the amount of hate crime) or ethics (is freedom from hate crime a human right).

Engagement with the source material is important. The essay is informed by credible and relevant sources but the candidate needed to fully explain their arguments. The candidate puts forward a lot of data but should use the quantitative evidence to further the perspectives. The candidate needed to make more explicit links between the source materials and instead of treating each source in isolation. Synthesising arguments and evidence into a coherent perspective is a key skill and as such would have improved the essay.

The source material is only partially critically evaluated and then only in terms of credibility and provenance. Justifying the source materials you use is important and needs to be done with reference to a wide range of criteria. You should justify why the source you have selected is appropriate but at the same time acknowledge any weaknesses. The essay needed to be systematic in its approach to critical evaluation. You should critically evaluate four different sources, two from each perspective. Consistent citation and a clear bibliography are the fundamentals of successful referencing. This essay needs an effective relationship between the citation and bibliography.

The essay is not balanced. This is probably a result of a poorly defined title. It is important to engage fairly with two contrasting perspectives. A good essay should be presented objectively and you need to engage with perspectives that challenge your existing point of view.

Consider the structure of the essay. The example presented is not well organised and moves between different perspectives without clear signposting. If the essay had been more structured the candidate would have seen more clearly that they gave more emphasis to the one perspective. Use discursive markers such as; 'firstly', 'secondly' or 'finally'. Let the reader know that you are moving to another perspective with signposts such as; 'on the other hand', 'in contrast' or 'conversely'. Use discursive markers to demonstrate links between source materials such as, 'furthermore', 'this is corroborated by' or 'moreover'.

Common mistakes

- Not establishing contrasting perspectives. It is really important to pose a title question that offers the opportunity to build contrasting perspectives. Title questions that begin with 'how' often lead to descriptive essays. For example, 'How will the development of AI robotics impact the workforce?', is unlikely to lead to an essay with a debate between contrasting perspectives.
- No critical evaluation of source material. Sometimes candidates forget to justify the appropriateness of the source material they have selected. It is important to consider the strengths and weaknesses of source material on both sides of the debate and use a range of criteria.
- Essays without a global dimension. Examiners are looking for essays that have perspectives that are informed by evidence and argument that relate to globally diverse countries. Your research material too should be selected from globally diverse sources.
- Essays without reflection. A key part of the essay and indeed the whole course is the skill of reflection. Some candidates miss out a reflective section. It is important to consider what you have learned, how your viewpoint has been affected and suggestions for further research that derive from your essay.

General advice

- Give plenty of thought to the title question. Having chosen a topic that interests you, complete some background research to identify an issue that is contested by different points of view. Only then write your title question.
- Be methodical in your approach to research. Keep a list of all the materials you have found, this will help you have an overview to make sure that the sources are varied and cover diverse geographical contexts. It is also important to note down all research for your referencing.
- Try not to use too many sources, effective research means discarding some materials. It is difficult to engage fully with all your research material if you have too much. The essay is only 1750–2000 words so six relevant and appropriate sources should be enough.
- The essay requires careful planning. You will be assessed against a wide range of criteria and it is important to fulfil all the demands of the component in your essay.

6. Revision

This advice will help you revise and prepare for the examinations. It is divided into general advice and specific advice for each of the papers.

Use the tick boxes ☐ to keep a record of what you have done, what you plan to do or what you understand.

Component 1 – Written Exam

Preparation for the Written Exam (Component 1)

- ☐ Find out when the examination is and plan some practise evaluations. A revision timetable will help you.
- ☐ Find out how long the paper is and how many questions you have to answer.
- ☐ Know the meaning of the command words used in questions and how to apply them to the information given. Highlight the command words in past papers and check what they mean.
- ☐ Make sure you practise lots of past examination questions so that you are familiar with the format of the examination papers. You could time yourself when doing a paper so that you know how quickly you need to work in the real examination.
- ☐ Look at mark schemes to help you to understand how the marks are awarded for each question.
- ☐ Revise the key criteria used to evaluate evidence and argument.
- ☐ Practise analysis and evaluation of arguments. Opinion pieces in newspapers are a useful source for practice papers.

During the examination (Component 1)

- ☐ Read the instructions carefully and answer **all** the questions.
- ☐ Check the number of marks for each question or part question. This helps you to judge how long you should be spending on the response. You don't want to spend too long on some questions and then run out of time at the end.
- ☐ Do not leave out questions or parts of questions.
- ☐ You do not have to answer the questions in the order they are printed in the answer booklet. You may be able to do a later question more easily then come back to an earlier one for another try.
- ☐ Read the two documents carefully. The examination time of 90 minutes includes 15 minutes reading time.
- ☐ Do not assess elements of argument when answering a question about evidence. Question 2 will always be about evidence from Document A.
- ☐ As you read the documents underline or highlight evidence and key aspects of the argument. You could use one colour for evidence and another for argument.
- ☐ Your answers must come from the documents and not your own knowledge.
- ☐ Read each question very carefully. Misreading a question can cost you marks:
  - identify the command words – you could underline or highlight them
  - identify the other key words and perhaps underline them too.
- ☐ Read all parts of a question before starting your answer. Think carefully about what is needed for each part.
- ☐ Answer the question. This is very important. Make sure your answer is responding to what the question asks.

Component 2 – Essay

Before writing the Essay (Component 2)

- [ ] Write down your initial response to the issue so you can reflect on how it has changed or been consolidated when the essay is finished.
- [ ] Look at mark schemes to help you to understand how the marks are awarded.
- [ ] Revise the key criteria used to evaluate evidence and argument.
- [ ] Select an issue that raises different points of view.
- [ ] Select an issue that is globally significant.

Research (Component 2)

- [ ] Keep a research diary and in particular keep track of all the sources that you have researched. This will ensure you have accurate referencing in your essay.
- [ ] Research widely the topic you have chosen. Try and use appropriate sources that are written by globally diverse authors and published by globally diverse organisations.
- [ ] The arguments and evidence you select from your research should relate to different parts of the world.

Writing the Essay (Component 2)

- [ ] Plan the essay carefully so all the assessment criteria are addressed.
- [ ] Cite all sources as you use them and build the bibliography as you go. It is important that you use source material correctly. Quotations should be in quotation marks and clearly cited. All essays are checked for plagiarism (see the Glossary for a definition of plagiarism).
- [ ] Structure the essay so that it includes:
  - an introduction outlining the contrasting perspectives, reasons and evidence
  - different lines of argument (these could be theme based or from different countries)
  - a main conclusion and a reflective section.
- [ ] Remain balanced. Another important aspect of the essay structure is to ensure that both sides of the debate are treated evenly.
- [ ] Do not go over the 2000 word limit. The bibliography is not included in the word count.
- [ ] Proof read the essay carefully.

Component 3 – Team Project

Working with others (Component 3)

- [ ] Listening is a key communication skill. Make sure all members of the team are given the opportunity to voice their opinion.
- [ ] Start a WhatsApp group or something similar for the team. This will provide a useful way to set up meetings and record how the group is functioning.
- [ ] Base your group on a shared interest in a particular topic rather than a friendship group. This is important, as you will have to decide as a team which issue to research.
- [ ] Be flexible. As a team you will have to allocate each member with a specific area of focus from which they will have to argue for their individual solution to the issue the team identified.

Time-management / keeping a log (Component 3)

- [ ] Keep a record of what was discussed and decided at team meetings. Having a clear record of what decisions were taken is a key part of successful collaborative work.
- [ ] Make a note of your initial response to the issue and record any changes of opinion or other thoughts you have as the project progresses. This will be useful for the reflective paper.
- [ ] Record your research. Make a note of all sources used and their relevance to your final solution.

- [ ] All team members will have competing constraints on their time. Schedule meetings in advance and make sure all team members put key milestones in their calendars.

The Presentation (Component 3)

- [ ] The presentation will require effective planning. It needs to be well-organised and effective in arguing for your particular solution.
- [ ] Familiarise yourself with any IT equipment that you plan to use so that you are confident when it comes to delivering the presentation.
- [ ] Your individual presentation must not be longer than 10 minutes in length.
- [ ] Your presentation should be engaging for a person without specialist knowledge of the issue being discussed. Language choices and technical terms should be carefully thought through.
- [ ] Practise the presentation several times before the final delivery. Ensure that the audio and visual elements complement each other rather than compete with each other.

Reflection (Component 3)

- [ ] Your written reflection should be evaluative and not merely a description of what happened.
- [ ] There are two areas that your reflective paper needs to consider. Firstly, you should reflect upon the effectiveness of the team collaboration. Secondly, you should reflect upon your learning. This can include learning about the issue, learning about giving presentations or learning about working collaboratively.
- [ ] The reflective paper has an 800 word limit. You should give equal space to both of the reflective elements mentioned above.

7. Useful websites

The websites listed below are useful resources to help you study for your Cambridge International AS Level Global Perspectives & Research course.

Cambridge Assessment International Education is not responsible for the accuracy or content of information contained in these sites. The inclusion of a link to an external website should not be understood to be an endorsement of that website or the site's owners (or their products/services).

The website pages referenced in this guide of work were selected when the guide was produced. Other aspects of the sites were not checked and only the particular resources are recommended.

Developing critical evaluation skills is an important part of Global Perspectives and Research and there are several websites that offer useful advice and support:

www.nuigalway.ie/academic-skills/criticalthinking/evaluatingargumentsandevidence/#
Evaluating Arguments and Evidence – National University of Ireland Galway.

www.futurelearn.com/info/courses/logical-and-critical-thinking/0/steps/9137
Logical and Critical Thinking – Future Learn.

www.khanacademy.org/test-prep/lsat/lsat-lessons/logical-reasoning/a/logical-reasoning--article--types-of-evidence
Types of Evidence – The Khan Academy.

Becoming a reflective learner is an important life skill and is assessed in components 2 and 3. More information of reflective learning cycles can be found at:

www.ed.ac.uk/reflection/reflectors-toolkit/reflecting-on-experience/gibbs-reflective-cycle
University of Edinburgh.

Note taking skills are an important part of being a successful researcher:

https://help.open.ac.uk/notetaking-techniques
The Open University.

Developing successful approaches to research is also important:

https://warwick.ac.uk/fac/soc/ier/ngrf/effectiveguidance/research/research_skills
Warwick University.

You should engage with a wide range of research materials that emanate from around the world. Below is a short list of potential sources of information from around the world. This is not an exhaustive list; it is designed to give you a feel for the wide range of source material available:

www.scmp.com/
South China Morning Post.

www.aljazeera.com/
Al Jazeera. News and analysis from the Middle East.

www.e-ir.info/
E-International Relations is an international relations website with unique content aimed at academics, general interest readers and learners.

https://neweralive.na/
The New Era is a daily national newspaper owned by the government of Namibia.

www.cfr.org/
The Council on Foreign Relations is an independent think tank based in the US.

https://apnews.com/
The Associated Press is an independent global news organization dedicated to factual reporting.

www.thejakartapost.com/
The Jakarta Post is a daily English-language newspaper in Indonesia.

8. Glossary

Here are some terms used in Cambridge International AS Level Global Perspectives & Research, along with a short explanation.

Please note you may find more terms while you are reading, researching or looking at past papers. Look them up in a dictionary or ask your teacher and add them to your notes.

Arguments	Consist of one or more reasons that lead to a conclusion.
Assertion	An unsupported claim.
Assumptions	Reasons which are not stated but are still part of an argument.
Claim	A statement that may or may not be true.
Counter-argument	An argument which could be made to challenge another argument.
Global topics	Broad potential areas for study. Learners can use topics as starting points for identifying issues.
Issues	Specific, more narrowly defined areas within a topic that are suitable as subjects for an essay or other piece of work. An issue often has global interest or relevance and can combine specific areas of different topics or themes.
Perspective	A coherent world view which is a response to an issue. A perspective is made up of argument, evidence and assumptions and may be influenced by a particular context.
Plagiarism	Plagiarism is presenting someone else's work as your own, by incorporating it into your work without full acknowledgement.
Rhetoric	Refers to language which is primarily designed to persuade its reader or listener and often relies on stylistic attributes.
Themes	Approaches to topics or issues, for example culture, economics, the environment, ethics, politics, science and technology.

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GLOBAL PERSPECTIVES AND RESEARCH

Paper 9239/11
Written Examination

Key messages

It is important that candidates read the paper carefully, paying close attention to the key words, to answer all the questions set. This applies to all questions. For example, in **Question 1(a)**: 'identify' and 'two individual musicians', and in **Question 1(b)**: 'identify', 'three other challenges' and 'cultural heritage'. In **Question 2,** the key words were 'evidence', 'strengths and weaknesses' and 'impact on the argument'; and in **Question 3**: 'perspectives', 'judgement', 'arguments' and 'stronger'.

Candidates managed their time well and allowed more time for **Questions 2** and **3**, which carry higher total marks than **Question 1**. **Question 1** only requires short answers or bullet points, and most candidates responded accordingly.

To achieve higher marks in **Questions 2** and **3**, candidates should develop their points clearly. This involves making a point, illustrating it with information or appropriate quotes from the text, and explaining it in the context of the document. Instead of just stating what a strength or weakness may be, the candidates should also explain how or why it is a strength or weakness. There should also be reflection on the impact of the evidence in **Question 2** and explicit reference to perspectives in **Question 3.**

Candidates will not gain credit for using material from their own knowledge that is not contained within the documents. Copying from the document is acceptable in the identification questions in **Question 1**, but is not appropriate for perspectives, analysis, and evaluation in **Questions 2** and **3**.

The marking approach is closely linked to the Assessment Objectives (AOs) given in the syllabus and the AOs are divided into distinct aspects. Candidates should be aware of what each question is assessing and develop their answers accordingly.

Candidates could improve in the following Assessment Objectives: **AO1b (Explanation)** in **Question 2**, and **AO1b (Perspectives)** and **AO1c (Evaluation of key components)** in **Question 3**.

General comments

Most candidates understood the documents, and many demonstrated a clear grasp of the question requirements. **Question 2** is focussed solely on the evidence in the first document, so candidates should concentrate on this aspect only. Many candidates recognised the need to explain the impact of the evidence on the author's argument in **Question 2**, reaching a reasoned judgement by the end. However, while candidates provided reasons why a piece of evidence was strong or weak, these were rarely developed into clear explanations.

In **Question 3**, it was increasingly common to find attempts to identify and describe perspectives as an introduction to the answers, which is perfectly acceptable practice.

In **Question 3**, stronger responses selected relevant and appropriate key components of argument and compared and evaluated them. These comparisons were most successful when they were direct comparisons.

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Comments on specific questions

Question 1

Question 1 encourages candidates to fully read and understand the details of both documents before answering the questions. The question paper indicates that approximately 15 minutes should be used for this, which is included within the exam time. These questions are designed to be straightforward, so answering them in order is recommended. The aim of these questions is to ensure that candidates fully understand the meaning of each document.

There are two parts to **Question 1**. **Question 1(a)** refers to Document A and **Question 1(b)** refers to Document B. Candidates are encouraged to answer both questions before proceeding to **Question 2**.

Question 1(a) asked candidates to identify two musicians who have tried to spread the Garifuna language and culture, as given by the author of Document A.

There were only two possible correct answers. Most candidates successfully identified both of them. A few candidates made mistakes by identifying some of the other people mentioned in the document, none of whom are musicians.

Question 1(b) asked candidates to identify three *other* challenges to Nigeria's cultural heritage, as given by the author of Document B, i.e., *not* 'a lack of funding' or 'the mismanagement of cultural resources'. It was important that candidates understood the idea of 'other'. Therefore, responses 'a lack of funding' and 'mismanagement of cultural resources', or ideas related to these two responses, were not correct.

Question 2

This question produced some strong responses. Most candidates correctly assessed the strengths and weaknesses of the evidence used by the author to support their argument. However, explanations for why a piece of evidence was strong or weak were often limited to terms such as 'more trustworthy,' 'expert,' or 'can't be fact-checked'. More development is required for an explanation to be credited under **AO1b**, where candidates must fully explain why a particular piece of evidence supports the claim it is intended to support. For **AO1c**, candidates must explain the impact of the evidence on the author's argument or on the reader. Candidates were better prepared for this part of the question and demonstrated skill in this assessment area. Additionally, some candidates attempted a reasoned summary judgement. The question focused on the analysis of 'evidence,' so answers that related to language or structure were not credited. Common discussion points often included the use of the statistics and survey information in the document.

Candidates were assessed on **Assessment Objective 1 (AO1 – research, analysis, and evaluation)**. The three aspects were: Identifying evidence (**AO1a**), Analysing the strengths and weaknesses of evidence (**AO1b**), and Evaluating evidence (**AO1c**). A score of 5 marks for **AO1a** was common. For **AO1b**, most candidates scored 3 marks but were unable to develop their explanations sufficiently to access the higher mark bands (4 or 5 marks). Marks for **AO1c** were much improved on previous years with many candidates scoring 3 or 4 marks.

A clearly structured approach is:

- Identifying a type of evidence (**AO1a**);
- Giving an example of that type of evidence from the document (**AO1a**);
- Clearly assessing whether it is a strength or weakness (**AO1b**);
- Providing a developed explanation of why it is a strength or weakness (**AO1b**);
- Evaluating the impact of the evidence on the argument or on the reader (**AO1c**).

The following example shows that the candidate identified a strength, quoted it and explained why it was a strength (**AO1a** and **AO1b**):

'One strength of the evidence in Document A is that it was published by a non-profit organization. The evidence for Document A was published by 'National Geographic Society,' which is a reliable and global organization. This is a strength because there are no monetary ties, meaning that the information is reliable and unbiased. This means, they do not favor a certain side which makes the evidence more persuasive and reliable.'

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For **AO1a,** the evidence is the publisher (the NGS). For **AO1b,** this evidence is declared a 'strength' as it is a 'reliable global organisation'. The explanation of this strength is further explained using a three-pronged approach. Firstly, the candidate notes that it has no monetary ties, as it is a non-profit. Secondly, it has unbiased information and so it does not favour one point of view. Thirdly, it is persuasive and reliable.

For **AO1c – Evaluating evidence**, candidates were expected to evaluate the impact of the evidence on the argument or on the reader. Answers ranged from simple assertions to some evaluation of the impact, to evaluation that included a judgement.

Many candidates scored highly on **AO1c** with more extended and detailed evaluations of the impact of the evidence on the argument. Again, a three-pronged approach was effective, for example:

'One strength is that the author named prestigious institutions such as UNESCO, and quoted people affiliated with them for example 'Andy Palacio, UNESCO Artist of Peace'. This may be considered a strength as it may make the readers understand the phenomenon of disappearing language and how it might be saved. This can be because if people working with institutions like UNESCO believe this is a real problem, it might lead to the readers believing this too. This may make the reader more open minded to the author's argument, and the possible solution presented, because they can see how both people and institutions agree with it.'

In this example, the candidate makes a more extended point and includes three ideas in their evaluation of the impact of the evidence on the argument. Firstly, readers understand the importance of the problem of language disappearing, secondly, readers are more convinced because UNESCO is taking the issue seriously, and finally, readers are more likely to be convinced by the author's argument because both people and institutions agree with it.

Question 3

The question asked candidates to evaluate the arguments of both authors and consider their perspectives. Candidates were also required to provide a judgement on whether Document A was stronger than Document B, Document B was stronger than Document A, or if they were both equally strong. Any of these conclusions are equally valid.

The most common approach was to first identify and describe the perspectives of each document and then directly compare the key components of the arguments throughout the answer. The higher scoring responses achieved this well with analysis and clear evaluation of the relative strengths of each document and were able to make a judgement as to which was stronger. There was no correct answer, and candidates were free to argue for their preferred judgement. It was also possible to evaluate the arguments of both documents separately and then provide a concluding judgement. However, this approach often led to repetition in the conclusion, and a lower mark overall.

Many candidates successfully identified and compared aspects that reflect a strength, such as the expertise of the authors, the level of potential bias, and the amount of supporting evidence provided. Responses achieving the highest marks gave clear examples from the documents and explained the impact on the overall argument, culminating in intermediate judgements. It is important that candidates exemplify the key components using the documents rather than listing pre-learned key components that might apply to any document.

There were two assessment objectives used **– AO1 (Research, analysis, and evaluation)**, which was separated into four aspects: Identify and compare key components of arguments (**AO1a**), Analyse and compare perspectives (**AO1b**), Evaluate arguments (**AO1c**), and provide a judgement about argument and perspective (**AO1d**). The second assessment objective was **AO3 – Communication.**

The highest-scoring responses adopted a structured approach to answering the question by methodically:

- Identifying, describing, and explaining the perspectives of the authors of both documents (**AO1b**),

  and then:

- Identifying and comparing key components of the argument (**AO1a**);
- Evaluating the relative strengths of the key components of the argument using appropriate examples and analysis of impact (**AO1c**);

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- Giving an intermediate judgement (**AO1d**);
- Coming to a reasoned judgement as to which argument is more convincing in a final conclusion (**AO1d**).

For **AO1b – Analyse and compare perspectives –** marks for this assessment objective were varied as some candidates did not provide any analysis of perspectives. Lower scoring responses simply identified perspectives, often from just one document. However, higher scoring responses compared, described and explained the significance of the perspectives in both documents.

The most challenging aspect of **AO1b** was identifying that the perspectives of each document were quite complex. Document A refers specifically to the use and spread of music to help save the Garifuna language, while Document B refers to specific actions which the Nigerian government needs to take in order to help protect the country's cultural heritage. It was important that candidates identified these clearly. Also, to score higher marks, candidates needed to draw some active comparison between the two perspectives.

The following is an example of a higher scoring response that correctly identified the perspectives of both Document A and B.

'The author of Document A focuses on using music to solve the problem of Garifuna's culture. She mentions their efforts to share the Garifunan culture and language through music and song. Seun Lori-Williams, author of Document B, addresses the importance of protecting cultural heritage, and provides several negative impacts that can be addressed as well as the solutions: for example, the author explained the law on cultural heritage is outdated in Nigeria. The author then provided how fixing the issue can benefit Nigeria, as amending the law can reduce cultural heritage violations by including fines and punishments for damaging heritage.'

The following is an example of a higher scoring response that described those perspectives and then drew an active comparison between them.

'Both Documents A and B are about protecting heritage and culture. However, Document B has the better argument. Document A makes a good argument as to how music, song, and dance can save Garifuna culture and language, but Document A only provides <u>one</u> solution on how to solve the problem. On the other hand, B provides <u>many</u> solutions as to how the government can help to protect Nigerian culture. For example, it explains that if the law on heritage was updated to be stricter, it would protect the culture more.'

For **3AO1a – Identify and compare key components of arguments**, many candidates gained high marks as they were able to compare a range of key components of arguments from both documents. The strongest responses provided a smaller number of well-developed comparisons. This enabled time to be used more effectively to demonstrate and develop other assessment objectives.

For **3AO1c – Evaluate Arguments**, higher scoring responses evaluated the key components of arguments that had been identified with clear illustration from the documents and made balanced reference to both documents. The following is an example of a higher-scoring response that a direct comparison of one key component, the way language is used in the two documents:

'In terms of language, Document A uses a more informal and subjective approach. Using words like 'cool' and 'masterpiece' draws the reader in, making them feel close to the topic, and making the argument more persuasive. Conversely, Document B adopts a more objective and third-person style. This objectivity allows readers to trust what is being said, making the argument more logical and therefore persuasive, but in a different way. However Document A's more audience-friendly approach may outweigh the benefits of objectivity as a thorough understanding of the topic from a closer perspective is essential for readers to get consumed.'

For **3AO1d – Judgement about argument and perspective** higher scoring responses compared key components of the argument throughout their answer. This allowed intermediate judgements to be made when both documents had been evaluated and compared. Candidates then provided a conclusion summarising the intermediate judgements they had made to come to an overall conclusion. The strongest responses concluded with comments which summarised the intermediate conclusions throughout the answer.

For **AO3 – Communication –** higher scoring responses produced a clearly written, well-structured and logical argument focused throughout on the question. Lower scoring responses produced arguments that lacked clarity, had an uneven structure, were in bullet points or did not always link answers to the question.

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GLOBAL PERSPECTIVES AND RESEARCH

Paper 9239/12
Written Examination

Key messages

It is important that candidates read the paper carefully, paying close attention to the key words, to answer all the questions set. This applies to all questions. For example, in **Question 1(a)**: 'identify', 'three different ways the processes for dealing with child migrants should be changed'; in **Question 1(b)**: 'identify', 'two different ways the GAL program could support child migrants'; in **Question 2**: 'explain,' 'evidence' and 'impact'; and in **Question 3**: 'perspectives', 'judgement' and 'stronger'.

Candidates managed their time well and allowed more time for **Questions 2** and **3**, which carry higher total marks than **Question 1**. **Question 1** only requires short answers or bullet points, and most candidates responded accordingly.

To achieve higher marks in **Questions 2** and **3**, candidates should develop their points clearly. This involves making a point, illustrating it with information or appropriate quotes from the text, and explaining it in the context of the document. Instead of just stating what a strength or weakness may be, the candidates should also explain how or why it is a strength or weakness. There should also be reflection on the impact of the evidence in **Question 2** and explicit reference to perspectives in **Question 3.**

Candidates will not gain credit for using material from their own knowledge that is not contained within the documents. Copying from the document is acceptable in the identification questions in **Question 1**, but is not appropriate for perspectives, analysis, and evaluation in **Questions 2 and 3**.

The marking approach is closely linked to the Assessment Objectives (AOs) given in the syllabus and the AOs are divided into distinct aspects. Candidates should be aware of what each question is assessing so that they may develop their answers accordingly.

Candidates could improve in the following Assessment Objectives: **AO1b (Explanation)** in **Question 2**, and **AO1b (Perspectives)** and **AO1c (Evaluation of key components)** in **Question 3**.

General comments

Most candidates understood the documents, and many demonstrated a clear grasp of the question requirements. **Question 2** is focused solely on the evidence in the first document, so candidates should concentrate on this aspect only. Many candidates recognised the need to explain the impact of the evidence on the author's argument in **Question 2**, reaching a reasoned judgement by the end. However, while candidates often provided reasons why a piece of evidence was strong or weak, these were rarely developed into clear explanations.

In **Question 3**, it was increasingly common to find attempts to identify and describe perspectives as an introduction to the answers, which is perfectly acceptable practice.

In **Question 3**, stronger responses selected relevant and appropriate key components of argument and compared and evaluated them. These comparisons were most successful when they were direct comparisons.

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Comments on specific questions

Question 1

Question 1 encourages candidates to fully read and understand the details of both documents before starting the questions. The question paper indicates that approximately 15 minutes should be used for this, which is included within the exam time. Answers to **Question 1** are designed to be straightforward, so answering the questions in order is recommended. The aim of these questions is to ensure that candidates fully understand the meaning of each document.

There are two parts to **Question 1**. **Question 1(a)** refers to Document A and **Question 1(b)** refers to Document B. Candidates are encouraged to answer both questions before proceeding to **Question 2**.

Question 1(a) asked candidates to identify three different ways the processes for dealing with child migrants should be changed, as given by the author of Document A.

Most candidates successfully identified three of the possible answers; where candidate missed out on marks, it was usually because they missed key words like 'immediately' which were deemed essential to keep the author's intended meaning. It was much rarer for candidates to give entirely incorrect answers unless they had misunderstood the question.

Question 1(b) asked candidates to identify two different ways the GAL program could support child migrants, as given by the author of Document B. Many candidates scored full marks for this question.

Question 2

There were many strong answers to this question. Most candidates correctly assessed the strengths and weaknesses of the evidence used by the author to support their argument. However, explanations for why a piece of evidence was strong or weak were often limited to terms like 'more trustworthy,' 'expert,' or 'can not be fact-checked'. More development is required for an explanation to be credited under **AO1b**, where candidates must fully explain why a particular piece of evidence supports the claim it is intended to support. For **AO1c**, candidates must explain the impact of the evidence on the author's argument or on the reader. Candidates were well prepared for this part of the question and demonstrated skill in this assessment area. Additionally, some candidates attempted a reasoned summary judgement. The question focused on the analysis of 'evidence,' so answers that related to language or structure were not credited. Common discussion points often included the use of the statistics and first-hand evidence in the document.

Candidates were assessed on **Assessment Objective 1 (AO1 – research, analysis, and evaluation)**. The three aspects were Identifying evidence (**AO1a**), Analysing the strengths and weaknesses of evidence (**AO1b**), and Evaluating evidence (**AO1c**). A score of 5 marks for **AO1a** was common. For **AO1b**, most candidates scored 3 marks but were unable to develop their explanations sufficiently to access the higher mark bands (4 or 5 marks). Marks for **AO1c** were much improved on previous years with many candidates scoring 3 or 4 marks.

A clearly structured approach is:

- Identifying a type of evidence (**AO1a**).
- Giving an example of that type of evidence from the document (**AO1a**).
- Clearly assessing whether it is a strength or weakness (**AO1b**).
- Providing a developed explanation of why it is a strength or weakness (**AO1b**) to support a claim.
- Evaluating the impact of the evidence on the argument or on the reader (**AO1c**).

The following example shows that the candidate identified a weakness, quoted it and explained why it was a weakness (**2AO1a** and **2AO1b):**

The sources of evidence are often not cited and left vague. An example of this is reference to the 'psychologists' statements'. There is no indication of who these psychologists are and if they are even qualified. This vagueness and general lack of cited sources is a major flaw as it impacts the reliability of the claim made by the author that children's 'brains are disrupted' by these experiences as we do not know if the source is reliable in the first place.

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For **2AO1a,** the evidence being uncited is illustrated accurately by writing about 'the psychologists' statements'. For **AO1b,** this evidence is declared a 'major flaw' so we know it is weak. The explanation of this weakness is explained using a three-pronged approach. Firstly, the candidate notes that there is no citation to say who the psychologists are. Secondly, the candidate notes that this impacts the reliability of the claim made by the author that children's 'brains are disrupted'. Finally, the candidate states that this is because we do not know if those psychologists are reliable in the first place.

For **2AO1c – Evaluating evidence**, candidates were expected to evaluate the impact of the evidence on the argument or on the reader. This ranged from making a simple assertion to some evaluation of the impact, to an evaluation that included a judgement.

Many candidates scored highly on **2AO1c** with more extended and detailed evaluations of the impact of the evidence on the argument. Again, a three-pronged approach was effective, for example:

Something the author does, however is use quotes to increase the emotional appeal of the article to the audience. The author uses a quote from a 14-year-old boy from Guatemala who was separated from his family during the migration process. 'I do not understand why they separated us, they did not give me a chance to say good-bye.' This quote wonderfully reflects the struggles of child migrants who are separated from their families and helps the reader to sympathise with the author's cause.

In this example, the candidate makes a more extended point and includes three ideas in their evaluation of the impact of the evidence on the argument. Firstly, the quote from the boy is a strong emotional piece of evidence, secondly, this reflects the real struggles of child migrants, and finally, this makes the readers sympathise more with the author's cause.

Question 3

The question asked candidates to evaluate the arguments of both authors and consider their perspectives. Candidates were also required to provide a judgement on whether Document A was stronger than Document B, Document B was stronger than Document A, or if they were both equally strong. Any of these conclusions can be equally valid.

The most common approach was to first identify and describe the perspectives of each document and then directly compare the key components of the arguments throughout the answer. The higher scoring responses achieved this well with analysis and clear evaluation of the relative strengths of each document and were able to make a judgement as to which was more convincing. There was no correct answer, and candidates were free to argue for their preferred judgement. It was also possible to evaluate the arguments of both documents separately and then provide a concluding judgement. However, this approach often led to fewer points being made, less direct comparison (which is a requirement of the question), repetition in the conclusion, and a lower mark overall.

Many candidates successfully identified aspects that reflect a strong argument, such as the expertise of the authors, the level of potential bias, and the amount of supporting evidence provided. Responses achieving the highest marks gave clear examples from the documents and explained the impact on the overall argument, culminating in an intermediate judgement. It is important that candidates exemplify the key components using the documents rather than listing pre-learned key components that might apply to any document.

There were two assessment objectives used **– AO1 (Research, analysis, and evaluation)**, which was separated into four aspects: Identify and compare key components of arguments (**AO1a**), Analyse and compare perspectives (**AO1b**), Evaluate arguments (**AO1c**), and Provide a judgement about argument and perspective (**AO1d**). The second assessment objective was **AO3 – Communication.**

The highest-scoring responses adopted a structured approach to answering the question by methodically:

- Identifying, describing, and explaining the perspectives of the authors of both documents (**AO1b**),

and then:

- Identifying and comparing key components of the argument (**AO1a**);
- Evaluating the relative strengths of the key components of the argument using appropriate examples and analysis of impact (**AO1c**);

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- Giving an intermediate judgement (**AO1d**);
- Coming to a reasoned judgement as to which argument, if either, is stronger in a final conclusion (**AO1d**).

For assessment objective **AO1b –** Analyse and compare perspectives **–** marks were varied as some candidates did not provide any analysis of perspectives. Lower scoring responses simply identified perspectives, often from just one document. Higher scoring responses compared, described and explained the significance of the perspectives in both documents.

The most challenging aspect of **AO1b** was identifying that the perspective was not a simple 'for' or 'against'. The perspectives from Document A and B were more multi-faceted than that.

The following is an example of a higher scoring response that correctly identified the perspectives of Document A and B:

Doc A focuses on the process of immigration in the US and how children go through harsh conditions alone; moreover, the author says how it must be improved for the children. Doc B, on the other hand focuses more on the aftermath of the immigration system and on the children's legal cases and courts and presents a solution of providing legal guardians and supporting volunteers so migrant children do not have to go through harsh conditions.

The following is an example of a higher scoring response that described those perspectives, **3AO1b,** Level 4:

Document A focuses on the poor conditions of child migrants and the subsequent maltreatment that can be mitigated by creating a less vindictive customs operations and allowing whole families to seek asylum. Document B, on the other hand, while admitting that children do get neglected and abused as immigrants, advocates for their legal representation in US courts. The legal system makes sure that they do not get asylum and a fair treatment. So, it must be improved. Here it can be seen that Document A argues for an equitable process of child immigration to prevent them from any harm while Document B advocates for their authorization once they have entered the US as immigrants.

For **3AO1a – Identify and compare key components of arguments**, many candidates gained high marks as they were able to compare a range of key components of arguments from both documents. The strongest responses provided a smaller number of well-developed comparisons. This enabled time to be used more effectively to demonstrate and develop other assessment objectives.

For **3AO1c – Evaluate Arguments**, higher scoring responses evaluated the key components of arguments that had been identified with clear illustration from the documents and made balanced reference to both documents. The following is an example of a higher-scoring response that provided two evaluative points and a direct comparison of the key component, expertise of the authors.

Document B is authored by an 'experienced professional in child welfare' development and 'qualified in child protection' who has seen first-hand how intimidating the court process is for children, hence the audience would deem her an expert on the subject since she is well versed in child protection and is seen as credible enough to opine on the issue. Document A contrastingly is authored by the Associate Director of Vera whose institutional credentials however authoritative are not helpful since her own credentials and relevance to the subject are not made clear in the introduction. This means the reader would deem her to be as lay as themselves on the subject and hence her arguments would be less persuasive since she's not an authority figure on the issue.

For **3AO1d – Judgement about argument and perspective -** higher scoring responses compared key components of the argument throughout their answer. This allowed intermediate judgements to be made when both documents had been evaluated and compared. Candidates then provided a conclusion summarising the intermediate judgements they had made to come to an overall conclusion. The strongest responses concluded with comments which summarised the intermediate conclusions throughout the answer, for example:

All in all, I find Document B to be stronger than Document A since its expert provenance and use demonstrative practical examples render its arguments more persuasive than Document A whose vague provenance and lack of examples are less convincing in terms of its arguments. Even though the

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perspectives they hold are equally strong, and their lack of cited sources is equally weak. Document B is stronger because of the practicality of its proposed solutions which make its arguments all the more valid.

For **AO3 – Communication**, higher scoring responses produced a clearly written, well-structured and logical argument focused throughout on the question. Lower scoring responses produced arguments that lacked clarity, had an uneven structure, were in bullet points or did not always link answers to the question.

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GLOBAL PERSPECTIVES AND RESEARCH

Paper 9239/13
Written Examination

Key messages

It is important that candidates read the paper carefully, paying close attention to the key words, to answer all the questions set. This applies to all questions, but most specifically **Question 2** and **3**. In **Question 2** the key words were 'evidence,' 'explain' and 'impact on the argument'; and in **Question 3**: 'perspectives', 'judgement' and 'more convincing'.

Candidates managed their time well and allowed more time for **Questions 2** and **3**, which carry higher total marks than **Question 1**. **Question 1** only requires short answers or bullet points, and most candidates responded accordingly.

To achieve higher marks in **Questions 2 and 3**, candidates should develop their points clearly. This involves making a point, illustrating it with information or appropriate quotes from the text, and explaining it in the context of the document. Instead of just stating what a strength or weakness may be, the candidates should also explain how or why it is a strength or weakness. There should also be reflection on the impact of the evidence in **Question 2** and explicit reference to perspectives in **Question 3.**

Candidates will not gain credit for using material from their own knowledge that is not contained within the documents. Copying from the document is acceptable in the identification questions in **Question 1**, but is not appropriate for perspectives, analysis, and evaluation in **Questions 2 and 3**.

The marking approach is closely linked to the Assessment Objectives (AOs) given in the syllabus and the AOs are divided into distinct aspects. Candidates should be aware of what each question is assessing and develop their answers accordingly.

Candidates could improve in the following Assessment Objectives: **AO1b (Explanation)** in **Question 2**, and **AO1b (Perspectives)** and **AO1c (Evaluation of key components)** in **Question 3**.

General comments

Most candidates understood the documents, and many demonstrated a clear grasp of the question requirements. **Question 2** is focused solely on the evidence in the first document, so candidates should concentrate on this aspect only. Many candidates recognised the need to explain the impact of the evidence on the author's argument in **Question 2**, reaching a reasoned judgement by the end. However, while candidates often provided reasons why a piece of evidence was strong or weak, these were rarely developed into clear explanations.

In **Question 3**, it was increasingly common to find attempts to identify and describe perspectives as an introduction to the answers, which is perfectly acceptable practice.

In **Question 3**, stronger responses selected relevant and appropriate key components of argument and compared and evaluated them. These comparisons were most successful when they were direct comparisons.

It appears that a small but noticeable minority of candidates this year were not adequately prepared for the assessment requirements of this exam. Some candidates left responses blank, while others wrote about topics unrelated to the examination questions.

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It is important for the centres to be aware that the Global Perspectives examination requires specific skills that must be explicitly addressed in teaching and learning. It is essential that candidates are supported in developing these skills to ensure they are equipped to meet the demands of the assessment.

Comments on specific questions

Question 1

Question 1 encourages candidates to fully read and understand the details of both documents before starting the questions. The question paper indicates that approximately 15 minutes should be used for this, which is included within the exam time. Answers to **Question 1** are designed to be straightforward, so answering the questions in order is recommended. The aim of these questions is to ensure that candidates fully understand the meaning of each document.

There are two parts to **Question 1**. **Question 1(a)** refers to Document A and **Question 1(b)** refers to Document B. Candidates are encouraged to answer both questions before proceeding to **Question 2**.

Question 1(a) asked candidates to identify two problems with employment in the tourism industry, as given by the author of Document A.

Most candidates successfully identified three of the possible answers. It was rare for candidates to give entirely incorrect answers unless they had misunderstood the question.

Question 1(b) asked candidates to identify three specific changes proposed by the NRDC report, as given by the author of Document B. Many candidates scored full marks for this question part.

Question 2

This question produced some strong responses. Most candidates correctly assessed the strengths and weaknesses of the evidence used by the author to support their argument. However, explanations for why a piece of evidence was strong or weak were often limited to terms such as 'more trustworthy,' 'expert,' or 'can not be fact-checked'. More development is required for an explanation to be credited under **AO1b**, where candidates must fully explain why a particular piece of evidence supports the claim it is intended to support. For **AO1c**, candidates must explain the impact of the evidence on the author's argument or on the reader. Candidates were better prepared for this part of the question and demonstrated skill in this assessment area. Additionally, some candidates attempted a reasoned summary judgement. The question focused on the analysis of 'evidence,' so answers that related to language or structure were not credited. Common discussion points often included the use of the statistics and survey information in the document.

Candidates were assessed on **Assessment Objective 1 (AO1 – research, analysis, and evaluation)**. The three aspects were: Identifying evidence (**AO1a**), Analysing the strengths and weaknesses of evidence (**AO1b**), and Evaluating evidence (**AO1c**). A score of 5 marks for **AO1a** was common. For **AO1b**, most candidates scored 3 marks but were unable to develop their explanations sufficiently to access the higher mark bands (4 or 5 marks). Marks for **AO1c** were much improved on previous years, with many candidates scoring 3 or 4 marks.

A clearly structured approach is:

- Identifying a type of evidence (**AO1a**).
- Giving an example of that type of evidence from the document (**AO1a**).
- Clearly assessing whether it is a strength or weakness (**AO1b**).
- Providing a developed explanation of why it is a strength or weakness (**AO1b**) to support a claim.
- Evaluating the impact of the evidence on the argument or on the reader (**AO1c**).

The following example shows that the candidate identified a weakness, quoted it and explained why it was a weakness (**AO1a** and **AO1b):**

Document A had a series of strengths and weaknesses. Beginning with the strengths, the author of the text is a journalist which means that she has research abilities that lead her to do a thorough investigation. Also, she lives in Cornwall, UK, which is the place and subject from the investigation regarding the mining industry

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in lithium. This could have facilitated the author to do a high-quality investigation as she could have more contacts that know about the matter.

For **AO1a,** the evidence is the Cornish journalist. For **AO1b,** this evidence is declared a 'strength' as she is a 'journalist with research abilities'. The explanation of this strength is further explained using a three-pronged approach. Firstly, the candidate notes that these research abilities will lead her to do a 'thorough investigation'. Secondly, the candidate notes that she is also from Cornwall, the subject of the document, so this adds to her knowledge. Finally, the candidate states that her 'local contacts' would lead to a high-quality investigation.

For **AO1c – Evaluating evidence**, candidates were expected to evaluate the impact of the evidence on the argument or on the reader. Answers ranged from simple assertions to some evaluation of the impact, to evaluation that included a judgement.

Many candidates scored highly on **AO1c** with more extended and detailed evaluations of the impact of the evidence on the argument. Again, a three-pronged approach was effective, for example:

One strength in Document A is that it contains numbers and statistical data. Throughout the document, there are many facts that the author provides. For example, Document A states, 'Cornish Lithium plans to produce 20,000 – 30,000 tonnes per year from water and rock and expects its first site to open in 2026.' This clearly shows how these numbers are facts. Statistical data proves that the information is accurate and measurable. This convinces the reader and strengthens the overall argument.

In this example, the candidate makes a more extended point and includes three ideas in their evaluation of the impact of the evidence on the argument. Firstly, the 20,000 – 30,000 tonnes per year is strong statistical data. Secondly, numbers tend to be factual, accurate and measurable. Finally, this factual basis will convince the reader which strengthens the argument.

Question 3

The question asked candidates to evaluate the arguments of both authors and consider their perspectives. Candidates were also required to provide a judgement on whether Document A was more convincing than Document B, Document B was more convincing than Document A, or if they were both equally convincing. Any of these conclusions are equally valid.

The most common approach was to first identify and describe the perspectives of each document and then directly compare the key components of the arguments throughout the answer. The higher scoring responses achieved this well with analysis and clear evaluation of the relative strengths of each document and were able to make a judgement as to which was more convincing. There was no correct answer, and candidates were free to argue for their preferred judgement. It was also possible to evaluate the arguments of both documents separately and then provide a concluding judgement. However, this approach often led to fewer points being made, less direct comparison (which is a requirement of the question), repetition in the conclusion, and a lower mark overall.

Many candidates successfully identified aspects that reflect a convincing argument, such as the expertise of the authors, the level of potential bias, and the amount of supporting evidence provided. Responses achieving the highest marks gave clear examples from the documents and explained the impact on the overall argument, culminating in an intermediate judgement. It is important that candidates exemplify the key components using the documents, rather than listing pre-learned key components that might apply to any document.

There were two assessment objectives used. The first assessment object was **AO1 (Research, analysis, and evaluation)**, which was separated into four aspects: Identify and compare key components of arguments (**AO1a**), Analyse and compare perspectives (**AO1b**), Evaluate arguments (**AO1c**), and Provide a judgement about argument and perspective (**AO1d**). The second assessment objective was **AO3 (Communication)**.

The highest-scoring responses adopted a structured approach to answering the question by methodically:

- Identifying, describing, and explaining the perspectives of the authors of both documents (**AO1b**),

and then:

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- Identifying and comparing key components of the argument (**AO1a**);
- Evaluating the relative strengths of the key components of the argument using appropriate examples and analysis of impact (**AO1c**);
- Giving an intermediate judgement (**AO1d**);
- Coming to a reasoned judgement as to which argument is more convincing in a final conclusion (**AO1d**).

For **AO1b –** Analyse and compare perspectives **–** marks were varied as some candidates did not provide any analysis of perspectives. Lower scoring responses simply identified perspectives, often from just one document. Higher scoring responses compared, described and explained the significance of the perspectives in both documents.

The most challenging aspect of **AO1b** was identifying that the perspective was not a simple 'for' or 'against.' The perspectives of Document A and B were more multi-faceted than that.

The following is an example of a higher scoring response that correctly identified the perspectives of Document A and B:

Document A suggests that mining lithium is very beneficial to the UK and itself but without community support, it will be more of a downfall. Document B suggests that mining lithium is very dangerous to indigenous people and should stop or they should figure out other ways to get it because of the high demand for it.

The following is an example of a higher scoring response that described those perspectives, **3AO1b,** Level 4:

While the author of Document A stands with the positive consequences that lithium mining may have on her city, the author of Document B talks about the negative repercussions this practice will have in Chile's indigenous communities. In Document A, the author emphasizes the positive economic and cultural aspects of lithium mining, as she believes that this method will revive the mining industry in Cornwall and is positive that it will provide good, long-term, well-paid jobs to residents. However, she also argues that lithium mining needs to be controlled and that resident's involvement is a priority. On the other hand, the author of Document B argues that lithium extraction through sedimentary rock is negative for Chile's indigenous communities as it is proven to drain water resources, damage wetlands and endanger ecosystems. She uses different testimonies from community members and data to show the concern of the people. Toward the end, Greenfield recommends some solutions that could be implemented so that the lithium extraction can be completely banned and indigenous communities can be protected.

For **3AO1a – Identify and compare key components of arguments**, many candidates gained high marks as they were able to compare a range of key components of arguments from both documents. The strongest responses provided a smaller number of well-developed comparisons. This enabled time to be used more effectively to demonstrate and develop other assessment objectives.

For **3AO1c – Evaluate Arguments**, higher scoring responses evaluated the key components of arguments that had been identified with clear illustration from the documents and made balanced reference to both documents. The following is an example of a higher-scoring response that provided two evaluative points and a direct comparison of the key component, expertise of the authors.

First, Document A has a two-sided view, a counterargument. It talks about multiple views, showing why lithium mining is good but why it may not be the best idea: 'It is not about how much money is generated, it is about how that money is used and whether it circulates in the local economy.' This shows the author's credibility as it shows his willingness to accept the positive and negative facts. This builds trust for the readers as it proves the author is not biased and is fair and balanced, which strengthens the argument. In contrast, Document B does not have a counterargument; in fact, it is deeply based on the negative side of lithium mining which is clear bias. All the evidence and perspectives come from only one side. This means the author may not be sharing all the information which makes the author less reputable. And this lack of balance and trust weakens the whole argument.

For **3AO1d – Judgement about argument and perspective -** higher scoring responses compared key components of the argument throughout their answer. This allowed intermediate judgements to be made when both documents had been evaluated and compared. Candidates then provided a conclusion summarising the intermediate judgements they had made to come to an overall conclusion. The strongest

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responses concluded with comments which summarised the intermediate conclusions throughout the answer.

For **AO3 – Communication –** higher scoring responses produced a clearly written, well-structured and logical argument focused throughout on the question. Lower scoring responses produced arguments that lacked clarity, had an uneven structure, were in bullet points or did not always link answers to the question.

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GLOBAL PERSPECTIVES AND RESEARCH

Paper 9239/02
Essay

Key messages

Candidates should make links between their research materials and not treat each source in isolation. This is synthesis. By synthesising their source material candidates will build coherent perspectives that respond to their title question.

Themes are approaches to topics or issues, for example culture, economics or health. Candidates should use different themes to analyse the implications of their title questions. In the essay candidates should clearly state and then develop three or four different thematic approaches to their title question.

There is no requirement to offer solutions in this component of Global Perspectives and Research.

General comments

There are still many candidates not addressing all the assessment aspects in their essays. Candidates need to plan carefully to ensure they demonstrate all the skills assessed in this component. There are ten different aspects used for assessment that are split across three assessment objectives; the first five relate to research, analysis and evaluation, the next three relate to reflection and the final two relate to communication. Each aspect is given its own heading in this report.

Most candidates chose issues with global significance that derived from the topics listed in the syllabus. Popular topics for focus were Impact of technologies, Migration and work, Climate change and Social inequality. The essays were for the most part well researched and made for interesting reading.

Comments on specific aspects

Analysis of Question

Candidates should construct a title question that is both concise and sets up a debate between contrasting perspectives. The title question should raise an issue of global significance. The following title questions from this series are all effective: *'Does social media positively influence democracy?', 'Do the benefits of AI outweigh the costs?', 'Should drugs be decriminalized?', 'Is migration beneficial for the host country?'.*

Having constructed an effective title candidates should analyse the implications of their question. This is achieved by considering the title question through different lenses or themes. Each specific lens or theme should be clearly stated by the candidate. Each section of the essay should ideally relate to a specific theme. An example from the essay titled *'Does social media positively influence democracy?'* reads *'The first way the social media's impact on democracy can be considered is by looking at online protest groups.'.* Protest groups is a clear implication of the question that can be used to analyse the question. A second example can be seen in the essay titled *'Should drugs be decriminalized?'*. In this example, the candidate uses 'Economics' which is one of the broad themes detailed on page 14 of the syllabus. '*One of the potential benefits of drug legalization is increased tax revenue, this links to the economic theme.'*.

Candidates should incorporate three or four discrete themes in their essays and the thematic analysis of their title question should be supported by two or three different sources.

Building Perspectives

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For candidates to achieve in this assessment criterion, their essay must have contrasting perspectives. This reiterates the importance of constructing an effective title. Essays that do not set up a debate will not be able to achieve in this assessment criterion.

Candidates are required to make connections between their source materials by synthesising arguments and evidence together to build coherent perspectives. The abridged example below comes from an essay with the title *'Is the media biased in its reporting?'.* The candidate states clearly that this section of the essay will examine the question through the cultural theme (see Analysis of Question above). The candidate then uses two different studies to develop the point that cultural bias exists amongst media producers. The synthesis is made explicit as the candidate shows the reader how the one source 'concurs with' the other.

'The cultural theme can be used to investigate the question of media bias. The media, unsurprisingly, often have cultural biases. This can be either in underrepresentation or misrepresentation. This can lead to a distorting of public attitudes. Researchers linked with the American University of Southern California published a study on arXiv – an academic archive – of over 300,000 images taken from U.S.–based fashion magazines, movie posters, and advertisements across more than 50 years. Minorities were far less conspicuous than Whites, and when they were present, they were also framed less importantly with more negative affect . . . These differences in representation, according to the USC study, reinforce societal stereotypes and perpetuate systemic biases (Chen et al 2024).

Media representation tends to reinforce cultural biases by perpetuating stereotypes based on race and ethnicity. To this extent, the Oxford Research Encyclopaedia of Communication concurs with the University of California study above that media producers, either unconsciously or knowingly biased, place ethnic minorities in stereotypical positions-for example, Black persons as criminals or Latinos as illegal immigrants. These are not only distorting the realities of the communities but also promulgating an 'ethnic blame discourse' where social issues are being ascribed to minority communities. Such distorted images may shape public opinion and feed prejudice, promoting systemic inequalities (Lichter et al 2020).'.

Range of Sources

Range refers to sources that emanate from different global contexts or present arguments and evidence pertaining to different global contexts. Ideally sources will pertain to or come from four different global contexts. Candidates should clearly state the global context of their material. In the example shown above (see Building Perspectives), from the essay '*Is the media biased in its reporting?*', the US context of the Chen et al 2024 source is made clear by the candidate.

Candidates are also required to use the source material to support perspectives. This requires engaging with the source in a way that uses evidence from the source and explains how the source supports the perspective. The example below comes from the essay titled '*Does social media positively influence democracy?*'. The candidate shows good control over their research material and uses argument and evidence from the relevant source to develop the perspective in support of the title question. The global context of the source is again made clear.

'Ngoka et al (2024 argue that social media can be an effective tool in mobilising voters in countries where political processes are less transparent, participatory, and democratic like Nigeria. Sharing the example of young candidates of University of Nigeria in Nsukka who were effectively mobilised for the presidential campaigns 2023 using WhatsApp, they argue that a positive use of social media can generate constructive effects on the political dynamics of a country. Unlike earlier elections in which the voting turn-out of young people always remained marginal and fluctuated between 35 per cent to 58 per cent, University of Nigeria offers an empirical example of how thousands of candidates were activated in two other campuses of Enugu and Ituku-Ozalla. Ngoka makes an important point here and argues that unlike other countries, social media campaigns in Nigeria was carefully gender-planned as among a total of 48000 to 65000 candidates, a large number was of female candidates, which was testified by their survey with 400 candidates.'

Candidates who use too many sources will not be able to demonstrate engagement. Candidates should be encouraged to be more selective in their research and use six to eight relevant sources with global range to support their essays.

Appropriateness of Sources

The skill of critical evaluation of source material is assessed in all components of the Global Perspectives and Research syllabus. Candidates are not required to critically evaluate every source used and the most

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successful candidates focused on four key sources. As this is a skills-based syllabus, candidates will achieve more if they use one criterion for critical evaluation per source and fully develop that specific line of interrogation, rather than offering several different lines of evaluation without development. Criteria for evaluation could include quality of evidence, logic of argument, credibility of author or issues of bias and vested interest.

Below is a good example of developed critical evaluation; it comes from the essay titled '*Do the benefits of AI outweigh the costs?*'. The candidate evaluates the expertise or credibility of the author. The example may be considered developed because the expertise of the author is clearly linked to the issue under discussion.

'Evidence taken from this speech by Dr. Ascelin Gordon can be deemed creditable because he has a PhD in physics and experience in high-performance computing, machine learning, and data science. Dr. Ascelin Gordon is an Australian academic who specializes in the fields of biodiversity conservation and environmental sustainability, which means that he has expertise in researching technology's impacts on the environment. This expertise links directly to my title question and the environmental theme.'

Many candidates are still not addressing this aspect of assessment in their essays.

Comparison of perspectives

To further emphasise the importance of an effective title question, if the candidate's essay does not set up a debate between contrasting perspectives they will not be able to achieve in this assessment criterion. There are several ways for candidates to compare perspectives. Firstly, candidates compare perspectives in their introduction (see example below). To gain credit in the introduction candidates are required to juxtapose at least two ideas for each perspective.

Secondly, many of the themes used to analyse the implications of the question will be able to support both perspectives. In the essay referenced earlier (*Is the media biased in its reporting?*), the candidate considered the cultural implications of the question. Having outlined the arguments for cultural bias in the media the candidate then went on to examine the contrasting perspective from a cultural theme, by discussing the opportunities that new media presents for marginalised minority ethnic voices.

Thirdly, it is expected that candidates will compare their perspectives holistically before arriving at their final judgement.

The below example comes from the introduction of an essay with the title '*Should economic sanctions be banned?*'. The candidate partially develops and juxtaposes two ideas from each perspective. It is more common for the candidates to offer more developed and evaluative comparisons at the end of their essay, before the final judgement.

'*Some argue that economic sanctions are detrimental to the human rights of innocent civilians by depriving them of basic necessities such as healthcare which adversely affects the lives of these people. Similarly, opponents of sanctions also believe that they affect not just the targeted country but also the neighbouring ones which disrupt global trade and supply chains. On the other hand, in an increasingly interconnected world, countries find themselves in the need to coerce the behaviour of other countries. For example, the sanctions imposed on Iraq and South Africa have influenced the actions of these nations. Added to that, these economic sanctions can encourage innovation in the receiving country, such as in Iran and Russia, by allowing them to develop ways to curtail its threatening effects. Thus, this essay will assess the impacts of imposing economic sanctions from medical, global trade, political and economic perspectives.*'

Consideration of Contrasting Perspectives

This assessment criterion requires candidates to approach their chosen issue in a balanced and objective way. If the title question raises an issue that the candidate holds a strong viewpoint about, it can be difficult to give due consideration to both perspectives. Sometimes candidates use very loaded language in their treatment of perspectives and make clear their personal viewpoint throughout. This can lead them into not treating each perspective fairly. Generally, candidates demonstrated maturity in their considerations and were able to apply the same levels of research, critical evaluation and word-count to both perspectives.

Reflection and Impact on Personal Viewpoint

Reflection is a skill that is assessed in the majority of components across the Global Perspectives and Research syllabus. Candidates should reflect on how engaging with the contrasting perspectives has

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impacted their personal viewpoint. Candidates' opinions may have been changed or consolidated. The following example is an extract from the candidate's reflection. It comes from the previously referenced essay titled '*Should economic sanctions be banned?*'. A reflective tone is clearly established, and the candidate sets out how their personal viewpoint has changed. To have reach the highest attainment level the candidate would have needed to make specific reference to a source and develop how it had impacted their viewpoint.

'Prior to this essay, I believed that economic sanctions did more good than harm due to the positive connotation it had. While this is true to an extent, after assessing the information I have researched, I now believe that the disadvantages of economic sanctions outweigh the advantages. The idea that these sanctions encourage self reliance and promote global peace is flawed. This is because sanctions restrict access to the necessary resources and investment needed by the target counties to develop innovative ways to combat the harmful effects.'

Further Research

For this area of assessment candidates are required to identify a specific new area for research and then offer some development of the potential research. To reach the higher attainment levels, candidates should also offer some reasoning as to why this research should be undertaken.

The following example comes from an essay titled '*Does participation in sports improve academic performance?*'. The candidate identifies a new theme (one that had not been considered in the essay) and then develops this with some detail. To have reached the higher attainment levels the candidate would have needed to say why this research would be important.

'I could further this research by focusing on the scientific part of the impacts. For example, I could research types of physical activity involved with sports and how it directly impacts different parts of the brain, and how those functions are related to improving or harming performance in school.'

Several candidates did not address this area of assessment in their essays or offered solutions to the issue. Solutions are required in Component 3 only and are not creditworthy in Component 2.

Structure

Most candidates presented essays with a lucid introduction followed by the main body of the essay and culminating in a supported conclusion. Each theme or implication of the question should be separated with logical paragraphing. Effective use of discourse markers is required to reach the higher attainment levels. Discourse markers include terms such as 'on the other hand, furthermore, in conclusion'. To demonstrate good structure candidates also need to remain focused on their title question. Quite often candidates drift away from their title question. For example, in the essay '*Does social media positively influence democracy?',* the candidate began to discuss the impacts of social media on mental health. Candidates should ensure that their essays are between 1750 – 2000 words. Candidates should not include tables, charts or diagrams in their essays.

Referencing

A Harvard style system of referencing is recommended. This is exemplified in the extract shown above in the 'Building Perspectives' section. The source cited *(Lichter et al 2020)* was referenced in an alphabetically organised bibliography in the form shown below. This can be considered effective referencing.

'Lichter et al (2020). Media and cultural bias: Stereotypes in representation. Oxford Research Encyclopaedia of Communication. Oxford University Press. https://oxfordre.com/communication/display/10.1093/acrefore/9780190228613.001.0001/acrefore-9780190228613-e-502'

Candidates are free to use any system of referencing they choose, and footnote systems are accepted. However, footnotes should only be used for reference details and not extra information or critical evaluation. Candidates need to cite all sources used.

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GLOBAL PERSPECTIVES AND RESEARCH

Paper 9239/03
Team Project

Key messages

Overall, the standard of work submitted by the candidates was good, with many candidates demonstrating understanding of the collaborative research process and the key principles of the syllabus. Most candidates engaged meaningfully with their chosen global issues, making efforts in research and reflection on learning and collaboration.

The following key messages are important for centres to note:

There are still adherents to the old syllabus in terms of naming team members and perspectives and demonstrating why the candidate's particular solution is the best. Naming team members and perspectives is not generally an issue, unless the candidate spends a significant amount of the10 minutes on this element. Stating why a particular solution is better than others in the team, though, is not required and time would be better spent developing the candidate's own solution and backing it up with evidence.

A couple of centres presented a joint team presentation which is not allowed to happen for this component. It led to candidates' marks being limited and only the work of each specific candidate being credited, rather than the presentation as a whole. This should be avoided as it leads to candidates getting very low marks.

Another thing that has happened this year is candidates speeding up their voice recordings to fit their presentations into the 10-minute time frame. This could impact marks negatively as the engagement is not the same and things could easily be missed if the pace of the presentation is too fast.

There were a few noisy environments, for example school bells/announcements and general school recess noise. Such interruptions often unsettle the presenters, many of whom are already extremely nervous, causing them to lose the flow of their argument. While it is understood that school life must carry on as normal, the location for presentations and the intrusion of external noise/distraction should be taken into consideration so that candidates who have worked hard can do themselves justice in their presentations.

Centres should be aware that the framing of the question can hinder candidates' performance. For instance, presentation phrased as 'To what extent is Problem X related to Issue Y' does not yield itself to an effective presentation or an effective solution. The most effective presentations were able to concisely identify an issue with detail and support from different countries.

Some centres this year submitted short videos without the candidate presenting, just running through the PowerPoint and then submitting a transcript. This limited candidates' marks as they had not submitted a presentation. This should be avoided in the future.

A significant trend this year was the noticeable use of AI by candidates, particularly in the reflective paper. In most cases, AI was used to polish language rather than to generate content. However, this did not appear to improve the quality of work or lead to higher marks – in some cases it was detrimental as reflective papers did not make sense. Centres need to be aware of this and check work for use of AI before it is submitted.

General comments

Topic selection varied, though familiar topics such as Air/Water/Industrial Pollution, Urbanization, Overpopulation, Human Trafficking, Immigration, Homelessness, and Obesity were all commonly found in this series. Candidates should be encouraged to explore a wide range of topics that interest them. Some

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topics which were both interesting and well-handled were the use of regenerative farming techniques to combat the impact of climate-caused food insecurity; the impacts of gambling addiction on society; lax food processing regulations on public health; single use plastics in school canteens and the impact of traffic congestion on the economy. It is often clear in both the Presentation and the Reflective Paper to what extent a candidate has been interested in and has engaged with their topic. Generally, those candidates who were invested in and enthused by their topic produced work of a high standard that enabled them to communicate that enthusiasm and investment to their audience. Such candidates often scored well across all the Assessment Objectives.

In general, most candidates made sure their presentation did not exceed 10 minutes, and their reflective Paper did not exceed 800 words. Most of the presentations also made good use of the 10-minute time frame. A few presentations did exceed the time limit, which sometimes negatively impacted the solution mark, while other presentations were well under the time limit and this generally impacted negatively on the development of the argument. Some candidates failed to manage their time effectively and ended up rushing at the end and this also compromised the quality of their solution.

Comments on specific marking criteria

Presentation:

AO1a PROBLEM ANALYSIS:

The importance of the phrasing of research questions cannot be underestimated. The strongest research questions were phrased in such a way as to draw out a level of critical thinking. One-word titles such as 'poverty', 'alcoholism', and 'overpopulation', often tend to elicit descriptive/narrative responses. Some examples of well-considered research questions were 'Is the use of prescription medicine to treat cystic fibrosis ethical?'; 'Do natural resources bring more harm than good to developing nations?; 'How can we solve the destruction of cultural heritage and why is it important that we do?'; and 'From a humanitarian perspective, do economic sanctions work?'.

Careful initial analysis of the problem should be the foundation on which the rest of the presentation is built. While the causes of any problem are important, equally important are the various impacts that the problem has or has had on anyone or anything. If a candidate simply tells the audience what the causes of the problem are, they are only giving their audience a part of the story. The strongest responses considered both the causes and the impact of the chosen problem across different aspects/sectors, both the immediate community and the wider world. Discussion was detailed and considered different areas such as economic, environmental and social impact, with sustained use of detail and data to support the argument throughout the presentation.

Successful presentations took a systematic approach to defining, breaking down and exemplifying the problem. An example of this was a candidate who focused on the extent to which the prison system assists or hinders the rehabilitation of inmates. The candidate explored the problem and looked in depth at its impact both locally and globally. Analysis needs to be sustained and well-supported throughout the presentation to merit four marks.

Less successful presentations defined the problem and perhaps provided some statistical evidence or examples but did not discuss the effect the problem had on people, animals, the environment, or the economy. Another issue was when candidates did not focus on the actual problem and either went straight into a solution or just focused on the benefits of their topic rather than the problem. One example of this was a candidate who focused on the benefits of having rights such as paid maternity leave, rather than the impacts when such rights are lacking – therefore not showing the audience what the issue is.

AO1b RESEARCH:

For the most part, this criterion was well addressed. Candidates consistently demonstrated the ability to conduct independent research. Generally, considerable volumes of research were evident, often very detailed but relying heavily on secondary sources such as articles and papers from the internet. Whilst there was still heavy reliance on statistical data, many candidates diversified their sources by including references from various countries, academic publications, credible media sources and surveys and case studies drawn from the press or from personal experience. A small number decided on primary research, such as carrying out interviews or questionnaires within college or further afield and this was commendable, especially when

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the data gathered was used effectively to underpin or elaborate on the candidates' arguments. Many candidates demonstrated an ability and willingness to research something very thoroughly.

There were also some poorly researched presentations. Generally, candidates who scored in the lower bands of the mark scheme tended to be those who had carried out minimal research or made very brief reference to research, lacked links between the research and the focus of the presentation, or had relied solely upon research relating to their home state, or country. Candidates should be reminded of the 4-mark descriptor for this AO, specifically the skill of using research from a variety of contexts. As mentioned previously, a range of contexts can be achieved through the use of websites, academic papers and journals, books and news articles, as well as drawing research from a variety of different countries. Another way of achieving a variety of research contexts would be for the candidate to conduct both primary and secondary research. A large number of candidates structured their presentation by tackling the impact of the problem within different contexts – starting with their local community, some then moved out into other areas of their country and then moved to consider specific countries on a global scale. This approach tended to work well, helping to ensure the requirements of AO1b were achieved, as well as forming an effective structure for the presentation.

AO1c EVALUATION OF SOURCES:

This proved to be the most challenging section for candidates. While many presentations were well-researched, the majority lacked any meaningful evaluation or synthesis of sources. Most candidates merely listed citations at the end of their presentations, often on a single slide, without integrating evaluation into their arguments. As a result, the majority of candidates were awarded 1 mark, with some scoring 0 due to the complete absence of any reference to sources.

For 1 mark only, many candidates included a bibliography and directly referred to it briefly. However, there were a few candidates who did not include a bibliography or reference to it at all, not revealing where they got any of their information from. For 2 marks, candidates needed to evaluate at least one of the sources they had used, by discussing for example the credibility, reliability and currency of the source. Some candidates attempted to do this by simply stating that a source could be trusted but then failed to explain why, for instance by discussing the author's credentials, e.g. 'This information comes from X newspaper, which is a trusted source'. The candidates need to say why the source is trusted to achieve marks for evaluation. Some candidates went into detail about the author of the source, but never mentioned that this made it reliable, stopping them for achieving marks for evaluation.

To achieve 3 marks, candidates need to show some evidence of source synthesis. This means comparing/contrasting similar or contradictory information drawn from each source to make a point. If candidates have not first evaluated any of their sources, then even if there is evidence of some synthesis, they will not gain 3 marks. Source synthesis relates to the skill of using information in one source to corroborate or refute information or ideas in another source, so simply stating that 'Both these sources are reliable sources' alone does not count as synthesis.

A candidate presenting on obesity provided a good example of evaluating the credibility of their source/s as well as synthesising two sources. In this example, the candidate contrasted the research of two bodies, which argue alternative ideas behind the rates of obesity around the world.

One candidate presenting on Habitat loss found examples of sources that cross-reference one another: 'This peer-reviewed article was authored by Professor Dasgupta… This source was also referenced in the article written by Paxton (previously mentioned in the presentation), as this piece contained important data on the issue of the economy if habitat loss continues. Both sources highlight the severe consequences that a lack of biodiversity could have…'.

AO1d SOLUTION:

Many candidates did not leave themselves enough time to give detailed evidence for their solution, which limited the marks awarded. Some candidates were still following the old syllabus and came up with an 'innovative' solution which they argued as being better than their team's solution. This is no longer a requirement.
There were very few submissions with comprehensive solutions and analysis of these and even fewer explaining the outcome of the solution elsewhere in detail. Some candidates drew on reports from global organisations detailing in depth the effectiveness of solutions and quantifying lives or money saved for instance. Some solutions missed out on marks due to lack of evidence to support their effectiveness.

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Some candidates presented one problem and offered multiple solutions, for example a candidate who talked about food waste and offered three solutions: better food planning, buying 'wonky' vegetables, and aerobic digestion. The issue here is that there is not one solution explored in enough depth or with enough support to achieve the top marks. It would be better to focus on one solution and go into detail about where it has been successful elsewhere and why that would be a good solution to the issue locally or globally.

Candidates in the higher scoring range not only proposed feasible interventions but also demonstrated their effectiveness through case studies or success stories. For example, one candidate's solution to elephant killing looked at the impact evidence surrounding 'de-tusking' as a solution, to great effect. Another candidate considered Wetland restoration in Costa Rica with excellent support from similar global projects. Overall, stronger responses effectively linked their solutions to real-world success stories.

AO3a ARGUMENT:

The structure of most candidates' presentations was generally sound with 3 being the most common mark awarded. This was an indication that while there were some well-argued points in parts of the presentation this was not consistently done. Such presentations often lacked the signposting/linkage between ideas and sections to be considered well-argued enough to gain 4 marks.

There were varying approaches to the structure of argument. Candidates could improve by remembering that there are two aspects to this criterion: structure of argument and well-argued points. Many candidates managed to present an argument with some structure and make some well-argued points within that structure. There was a flow to such presentations, they were easy to follow and had a degree of natural progression and order. Some candidates used signposting effectively to produce a well-structured argument. Such candidates often structured their argument very methodically, relying upon key slides and headers, beginning with a clear outline of the issue, exploring it both locally and globally, and then reaching a solution – explaining the justification for and effectiveness of their chosen solution.

While most presentations lacked sustained logical and coherent argumentation to earn the top mark of 5, a few stood out as exceptions. Candidates who excelled on this criterion used clear and often unobtrusive signposting throughout, making their presentations easy to follow with lines of argument that were clear from the outset and developed logically. Ideas and arguments were consistently well-supported with explicit reference to research that had been carried out. One particularly strong candidate did their presentation on the decline of the bee population. They structured their presentation effectively by first exploring the local dimension of the issue, then broadening the scope to examine its global implications, before finally proposing a solution. This logical progression helped to build a clear and compelling narrative, allowing the audience to understand the scale of the problem and the rationale behind the proposed response. One candidate gave a strong sense of being in control of their presentation, making the audience well aware of where the argument was going next by using a combination of signposting phrases, such as 'Now I'm going to talk about…' and rhetorical questions 'A big question that's asked is why do we need…', or by re-focusing attention on their visual presentation, 'Here we can look at…'. This also helped them score well for AO3c.

A commonly chosen way to begin the presentation was to provide an outline of key words/glossary and a breakdown of the perspectives or 'lenses' taken by each of the group members. In some cases, this used up a significant amount of the permitted time and did little to improve the marks of the candidate. Dictionary definitions of commonly understood words are generally unnecessary unless the word is open to misinterpretation, or its definition is likely to play a key role in developing the argument.

AO3b VISUAL SUPPORT:

Most candidates opted to use graphs, charts, diagrams and pictures for their visual information. Many candidates gained a minimum of 2 marks due to their slides having at least some relevance to the topic and more candidates used some images rather than relying on text only which was positive. Candidates who explicitly referred to and actively engaged with the content of at least one of their slides, for instance by talking the audience through a graph or a chart, were awarded 3 marks. Some candidates had several graphs or charts relating directly to the arguments they were developing, and they talked through these in depth, using them to drive their argument forward. This indicated that the visuals had been carefully selected to serve a purpose, and gained the candidates 4 marks. Top-scoring candidates were instantly noticeable and able to use the slides, graphics, maps, charts and other visuals in a meaningful and purposeful way. Those few candidates who adopted a variety of visual approaches and used them to consistently support and drive their arguments forward, as well as communicate their points clearly and engage their audience, were awarded the top mark of 5 for this criterion.

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Many candidates would benefit from additional guidance on how to select and engage with visual aids, and by practicing their presentations beforehand and receiving feedback on how they can improve. Candidates need to use their visuals strategically to reinforce key points and should always explain their relevance.

AO3c LANGUAGE:

Some candidates struggled to demonstrate real awareness of their audience, and this limited them to lower marks for this criterion. Most candidates began with some form of greeting, such as 'Hello', which was not enough by itself to engage the audience and audience awareness was often not maintained. Phrases like 'you' or 'as you can see' were occasionally used but did not generally translate into a consistent or effective engagement strategy. Too many candidates continue to use an 'essay in speech' style format to deliver their ideas, rather than engaging in a first-person communication that connects with the audience. To score more than 1 or 2 marks for this criterion, candidates need to think about their language, tone and manner of delivery in order to draw their audience in and engage their interest.

Candidates with more effective presentations spoke slowly, made eye contact and referred directly to their audience using personal pronouns, asking questions, anticipating responses and using imperatives to gain their audience's attention. Enthusiasm and confidence made their presentations engaging and interesting. When interacting with the data on visual aids, or discussing specific information for example on graphs, tables and photographs to support an argument, they would say, 'let us look at', or 'as you can see here', thereby engaging the audience with their research and findings. Some candidates made use of rhetorical questions, which can be an effective linguistic tool. However, in some cases this was their sole method of directly addressing the audience and was used perfunctorily, rather than for effect. Other candidates only remembered to consider the presence of the audience when talking through a slide/graph but promptly forgot them for the remainder of the presentation. Effective approaches were those which used a combination of methods of address, including rhetorical questions, asides or comments directly made to the audience, instructions and short statements. One example of a candidate making use of direct address such as, 'I will give you a second to digest the data', rhetorical questions, 'but how can this be addressed?' and collective pronouns, 'if we have a common goal…'.

REFLECTIVE PAPER

For the most part, candidates showed some evaluation of collaboration and learning. Candidates often use the reflective paper to discuss their solutions and the team solutions without any reference to collaboration or learning. This should be avoided as it is using up their word count and does not gain them any marks.

AO2a COLLABORATION:

In this criterion many of the candidates tended to focus on complaints about group dynamics or personal frustrations, instead of analysing of how the group functioned or what was learned from working as a team.

Candidates with the most successful papers realised that they needed to discuss group processes, challenges, and how differences were resolved. Many candidates spoke about setting up online platforms for ease of communication and reflected on how teamwork affected their understanding of the topic. The most effective format in order to encourage evaluation of collaboration seemed to be where candidates stated a method or approach used by their group, for example 'we carried out individual research on solutions and then came back together to share our findings', followed by a clear and explicit statement which evaluated the effectiveness or success of this approach, such as 'by coming back together for feedback, this ensured we did not overlap each other's research, and helped to ensure an open and constructive communication between us all'. One systematic and effective approach can be found in a reflective paper in which the candidate considered three aspects of the team's collaboration: Planning, Communication and Problem Solving. The candidate then proceeded to take issues such as conflict in role assignment or unequal contribution, and then broke it down into the following areas: what happened; its impact on the team; how it was addressed and the effectiveness of how it was addressed.

Less successful reflective papers were those which tended to provide a running commentary of wasted lessons, rehearsals of presentations, groups fallings out, lengthy commutes to school or candidates leaving the class, for example. These reflections were descriptive and tended to lack consideration of collaboration or learning. Some candidates used the reflective paper as a format to voice irritations or describe at length points of conflict with their group members, using it as an opportunity to name the least helpful members of their team. These reflections were descriptive in nature and lacked any real critical consideration thereby keeping the response at 2 marks.

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AO2b LEARNING:

Candidates often stated what they had learned during the project but failed to evaluate this learning. They did not reflect on the personal impact their learning might have had on them, their opinions, outlook on life or behaviour; or how that learning might be of specific use to them in the future. Learning can refer to what the candidates have learned about the topic they researched, but equally it can refer to what they have learned about themselves, their own skills and personality. Some of the best responses covered both these elements. Some reflective papers included particularly thoughtful and, at times, moving insights into what the candidates had come to understand about serious global issues such as gun crime and climate change. In a few cases, candidates described taking direct action beyond the project, including launching campaigns or engaging in voluntary work to promote social change.

Several candidates expressed that they had come to value the process of working on the project as much as the final outcome. Several recognised the personal growth that came from collaborating with others or being pushed out of their comfort zones. Others reported being challenged to reconsider aspects of American society and politics, particularly in relation to economic systems, social inequality, and gun ownership.

In less successful responses, candidates simply repeated what research they had carried out without considering what they had learned from it and therefore they could not move beyond 2 marks.

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GLOBAL PERSPECTIVES AND RESEARCH

Paper 9239/04
Research Report

Key messages

The Cambridge Research Report is assessed against 15 skills-based criteria. To reach the higher attainment levels, candidates need to address all the areas for assessment. Assessment areas most often omitted were the methodology section, critical evaluation of sources and reflection on perspectives. Candidates must set out in their introductions which themes they are using to analyse the implications of their title question. It is also important that candidates outline why these themes have been selected to analyse the question.

It appears many centres provide candidates with a framework to scaffold their reports. Whilst this can be a beneficial practice in preparing candidates, some centres are providing frameworks that are too rigid. Reports from particular centres were identical in their structure and consequently constrained the potential creative thinking of their candidates. Some centres provided frameworks that prevented candidates from addressing all of the assessment criteria, diminishing opportunities for higher attainment.

The Research Proposal Form should be used jointly by teachers and candidates to ensure that the title questions are compatible with the assessment criteria.

General comments

The reports produced by candidates covered a wide range of topics and issues. Popular areas of focus this series were Artificial Intelligence, Genetic Modification Climate Change and Migration. Candidates were able to focus in on contentious issues arising from these topics having completed preliminary research to understand the relevant issues and perspectives. This process, coupled with teacher feedback places candidates in a strong position to construct their title question. The title of the Cambridge Research Report must be in the form of a question.

It should be noted that unlike AS Level coursework, there is no requirement for the report to have a global dimension.

Research Log

Candidates are free to design their own Research Log template. The majority of candidates produced tables with clearly labelled columns in which to record pertinent information and reflections. It is strongly recommended that candidates incorporate a 'future plans' column to ensure that the Research Log has some future orientated goals. Equally important is a column to record candidate reflections on the research decisions and source material. A weekly or fortnightly entry is recommended.

Research Log exemplars are available in the syllabus and other training materials.

There are two Assessment Objectives (AOs) for candidates to address in their Research Logs. In AO1, candidates should be looking forward and setting out objectives and milestones giving a clear indication of planning. AO2 is focused on the skill of reflection, candidates should reflect upon the decisions made and research undertaken. In AO2 candidates should also record source notes.

There were several very detailed Research Logs submitted, these demonstrated clear planning throughout the research process as well as analysis of the research findings and decisions. It should be noted that critical evaluation of research material should not be presented in the Research Log.

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Questions and Perspectives

A successful research report requires a well thought out title question. The research report needs to set up a debate between contrasting perspectives that respond to an issue raised by the title question. Here are few examples of effective title questions from this series: '*Is physician-assisted dying justifiable?', 'Are carbon taxes effective?', 'Is using AI in education beneficial?'*. These examples all contain two key elements that make them strong title questions. Firstly, they can be answered 'yes' or 'no' and therefore it is clear that the title questions set up a clear debate between contrasting perspectives. The contrasting perspective will be either for or against the title question. Secondly, the example questions are all raising issues that are well documented, therefore enabling the candidate to find a wide range of relevant and credible source material. The title questions shown can all be considered through the lens of different themes. For example, the candidate asking *'Is using AI in education beneficial?'* could consider the question through an economic lens, an ethical lens or an environmental lens, to name just three. It is important that the candidate sets out in the introduction or methodology which themes the report will use to analyse the title question. Candidates must also reflect upon why they have chosen the identified themes and how they will shape the report (see Reflection section below).

Less successful title questions often lack focus or fail to set up a debate. For example, the title *'How does psychology address discrimination and prejudice individually and socially?'* does not suggest a debate and therefore may lead to a descriptive report. Also, the lack of clear parameters makes it uncertain what issue the report will address. '*Is it possible to get away with murder?'*, is a title question that may seem as though it sets up a debate. However, it is evident that the answer to the question is yes. A candidate posing such a question will not be able to find relevant and credible research to support the 'no' perspective. The above title question could have been reformulated as '*Have modern policing methods increased the rate of convictions for murder?'* for example, to allow a debate between contrasting perspectives.

Synthesising research material to build coherent perspectives is a key assessment aspect of the research report. In preparation for demonstrating this skill it is advised that candidates use their Research Logs to make notes of similarities and differences in their research materials. Having done this, candidates will be able to make explicit links between their research materials as they develop arguments and perspectives for and against the title question. This is the skill of synthesis. The extended example below comes from the report titled *'Is physician-assisted dying justifiable?'.* The candidate raises the issue of misdiagnosis via the first source and develops the point via an example from a second source. The two sources are synthesised to build the perspective that argues against physician-assisted dying.

'One of the main medical concerns around the legalization of euthanasia is the possible misdiagnosis of patients and its irreversible consequences. Medical professionals, despite the advances in diagnostic technology, acknowledge that errors in diagnosis can still occur in terminal and debilitating illness. A study by BMJ Quality & Safety Journal made an estimate that approximately '12 million Americans are misdiagnosed annually' with 10 – 20 per cent of these cases involving serious conditions (Singh H, Meyer AND, Thomas EJ, 2021). Whilst this source only focuses on America it provides concrete data to prove that misdiagnosis is a legitimate issue in today's society and could trigger significant consequences if euthanasia was to be legalised.

An article in the BMJ Journal shared a case study which strongly shows the reality of misdiagnosis in euthanasia. In the Netherlands, where euthanasia in psychiatric disorders is legal in certain circumstances, 'a 68-year-old patient, diagnosed with bipolar disorder, requested euthanasia because of tiredness, repeated falls and racing thoughts'. To support her wish, her family and psychiatrist agreed that euthanasia would be the most suited treatment. However after a second opinion was given, the doctors shared their disagreement with the diagnosis of bipolar. After the discontinuation of her psychotropic drugs her mobility and tiredness improved, after reflection the doctors came to the conclusion that her struggle in life could be explained by 'intellectual disability and an attention deficit hyperactivity disorder'. This second opinion supported her to find meaning in life when if no second opinion her life would of be taken due to a simple misdiagnosis (Schmahl O, Oude Voshaar R, van de Poel-Mustafayeva A, Marijnissen R, 2021).'

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The comparison of perspectives is a skill that should be demonstrated at several points in the research report. Candidates should offer a comparison of perspectives before their intermediary judgements at the end of each thematic section and then offer a more holistic comparison of perspectives before the final judgement is made. The majority of candidates were able to offer a comparison of perspectives in the build up to their final judgement, however many candidates did not demonstrate this skill in the build up to their intermediary judgements. The main reason for this was the omission of intermediary judgements (see Concepts, Research Methods and Judgements below).

To reach the higher attainment levels, candidates need to move beyond a descriptive approach that essentially juxtaposes a summary of each perspective and move to a more evaluative approach that compares the strengths and weaknesses of each perspective.

Sources

As stated above, the research report should set up a debate between contrasting perspectives, therefore it is important that the sources candidates use contain strong lines of argument. Using purely informative sources often leads to descriptive research reports rather than reports that develop clear arguments and perspectives in response to the title question. Candidates should try not to use more than six sources when considering each thematic implication of their title question. Using too many sources prevents the candidate from being able to offer full analysis of each source.

Candidates engaged well with a wide range of source material, much of which was academic and highly credible. However, some candidates still try to use too many sources in their reports. Using too many sources prevents the candidate from being able to offer full analysis of each source.

Critical evaluation is assessed in all components of the Global Perspectives and Research syllabus. There are still many candidates who are not addressing this area of assessment in their research reports. Although many candidates still evaluate their sources in terms of provenance, which is creditworthy, more candidates are demonstrating more focused critical evaluation. To reach the higher levels candidates need to evaluate aspects more specifically related to the arguments or evidence presented by the source, thereby making the critical evaluation explicitly relevant to the title question. The following example comes from a report titled '*Does social media activism lead to social change?'.* The candidate evaluates the problems of using qualitative data to support broader claims. The critical evaluation is developed and made explicitly relevant to the title question.

'*The study also relies heavily on qualitative analysis and case studies, which makes it harder to measure the real, long-term impact of social media activism. While it is clear that viral campaigns raise awareness, there is less evidence that they lead to lasting political change. Its examples are convincing, but the lack of quantitative data limits how broadly its conclusions can be applied. This makes it a useful but slightly narrow perspective in terms of evaluating impact. The conclusions drawn cannot be generalised beyond the specific context the case study pertains to*'.

Concepts, Research Methods and Judgements

As candidates undertake research into their chosen topic area, they will engage with concepts and complex ideas. Using the Research Proposal Form as a framework, teachers and candidates can identify relevant concepts and complex ideas that will inform the research report. Teachers may not be subject specialists in the candidate's chosen research topic area. Therefore, it is important that candidates are able to explain to their teachers how the identified concepts relate to their research report. Although candidates are expected to engage with concepts and complex ideas, they need to make their report accessible to the layperson (see 'Communication' below). If candidates cannot demonstrate a sound grasp of the identified concepts and complex ideas through discussion with a teacher, then they are likely to find it difficult to do that within their report.

In the report referenced above (*Is physician-assisted dying justifiable?*), the candidate utilised the following concepts and complex ideas: Autonomy, Sanctity of Life, Slippery Slope, Hippocratic Oath and Public Policy.

There are still many candidates that do not include a methodology section in their reports. The methodology section assesses a higher order skill that encourages the development of independent enquiry. Candidates should demonstrate an understanding and use of appropriate research methods and methodology. Candidates are often generic in their approach, and references to search engines and data types have no specified relationship to the topic area of the report. To reach the higher attainment levels, candidates need

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to explain why particular sets of methods are appropriate for specific subject areas. Candidates are expected to engage with the methodology underlying their choice of research methods.

Candidates will often set out their themes in the methodology section and this is perfectly acceptable. However, candidates should not engage with critical evaluation of their source material in this section.

Primary research is not a requirement. It should also be noted that candidates should not be engaging with primary research that may break ethical guidelines or compromise their safety. Teachers should give due consideration to any proposed primary research before giving their approval.

Ideally, the research reports will contain a series of intermediary judgements and a final judgement. It is important that judgements respond directly to the title question posed. Although most research reports contained a final judgement, many did not offer intermediary judgements.

In the research report referenced above (*Are carbon taxes effective?)*, the candidate analysed their title question through three thematic lenses; political, environmental and economic. At the end of each section of the research report, the candidate offered an intermediary judgement that was preceded by a comparison of perspectives (see Questions and Perspectives) pertaining to each identified theme. The comparison of perspectives offered support for the intermediary judgement. The candidate then came to a final judgement in the report's conclusion.

Reflection

Candidates should identify their chosen themes in the introduction and/or methodology. The skill that is being assessed here is the candidate's ability to reflect on why the themes have been selected and how they shape the report. Very few candidates are addressing this in their reports. Below is a strong example of what is required from a research report with the title *'Does Artificial Intelligence pose a threat to marginalised groups?'*. The candidate reflects upon why their themes are important and considers the relationship between them. There are some helpful diagrams on page 15 and 16 of the syllabus that visualise the interplay of topics, themes, issues and perspectives.

'The hypothesis is that generally AI worsens inequality due to biases in training data. The report analyzes themes from healthcare, economic and legal perspectives because their impacts are often realized immediately, as opposed to areas like education or social inclusion, where it can take time for the impacts to show. These themes – healthcare, legal systems, and economic opportunities – cover sectors which have a sizable impact on marginalized groups. For example, healthcare impacts life expectancy and any errors in that could have severe consequences. The legal system oversees patrol, arrests and freedom, and biases in AI could lead to systemic racism and inequality. Exclusion in economic opportunities, which determines livelihoods, can lead to poverty which can widen societal divides. Also, these sectors are interlinked. For example, exclusion from economic opportunities can reduce healthcare access. And biased legal decisions can hinder economic growth. So, by focusing on these themes, I can provide a nuanced and comprehensive analysis of the multifaceted impact AI has. For example, wrong diagnosis in the healthcare sector can have lasting consequences, and in the legal sector it may amplify racism through the 'machine said it, so it must be correct' mentality. Similarly, AI-powered hiring systems can reinforce income inequality and reduce workforce diversity, hindering economic growth and innovation. The report is structured into three sections, one per theme. Each section presents contrasting perspectives, concludes with a summary, and the entire report ends with an overall conclusion and reflection.'

The next area reflection for assessment is the candidate's ability to reflect upon the strengths and limitations of their conclusion. Although many candidates considered strengths or weaknesses of the process behind producing the research report, they did not always reflect explicitly on the strengths and limitations of their conclusions. This is creditworthy but not at the higher assessment levels.

There is no requirement for candidates to offer suggestions for further research. Although ideas for further research implicitly hint at weaknesses within the report, generally any further research suggestions did not link to improving the report's conclusions.

Many candidates are presenting the type of reflection on perspectives seen in components two (Essay) and three (Team Project). This type of reflection focuses on how the perspectives have consolidated or changed the candidate's original point of view. In other cases, candidates offered a descriptive account of what had been learned during the process of producing the report. This is creditworthy, but only at the lower assessment levels.

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Several candidates offered solutions or future recommendations which is not a requirement.

Communication

There are several strands to this area of assessment. The first assessment area pertains to the report's structure. Candidates need to construct their introductions carefully. The terms and scope of the report that are set out in the introduction should be adhered to in the report. For example, there were cases where candidates stated in the introduction which themes would inform the research report and then didn't refer to them again.

Content pages and headings are not essential, but they do provide a useful framework. Headings, in particular, are an effective way for the reader to navigate the report. Candidates should also use discourse markers, if effectively done these will guide the reader through the report. To achieve at the higher attainment levels candidates must follow the guidance in the syllabus (see page 24) which states, 'the report must be written in continuous prose and must not exceed 5000 words. An accurate word count must be clearly stated.'.

Another communication skill being assessed is how candidates engage with subject specific terminology in a way that makes this accessible to the lay reader. Reports should be written for an audience that does not have expertise in the topic area. Subject specific terminology will be used if candidates engaged with concepts and complex ideas (see Concepts, Research Methods and Judgements above). Making the terminology understandable to the reader through explanations and arguments will demonstrate this aspect of communication skills.

The Harvard referencing system is recommended as it makes it clear to assessors where and how sources are being used to support perspectives. This system has been exemplified in the candidate extract used in the 'Questions and Perspectives' section of this report. It is recognised that different subject areas use different referencing systems and candidates are free to use any appropriate system. Many candidates were able to present effective referencing regardless of which referencing system they chose to use. An effective system is one where each citation has a full reference that is easily located in the bibliography. A full reference means that the reader has enough detail to enable them to find the source without relying on a hyperlink. The references should be set out systematically and logically in the bibliography. The Bibliography should be uploaded as a discrete document and not as part of the Research Log. Also, the Bibliography should not contain critical evaluation of source material.,

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GLOBAL PERSPECTIVES & RESEARCH **9239/11**

Paper 1 Written Exam **May/June 2025**

INSERT **1 hour 30 minutes**

INFORMATION

- This insert contains all the resources referred to in the questions.
- You may annotate this insert and use the blank spaces for planning. **Do not write your answers** on the insert.

This document has **4** pages. Any blank pages are indicated.

DC (KAS) 343989/3
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The following documents consider issues related to cultural heritage. Read them **both** in order to answer **all** the questions on the paper.

Document A Adapted from: *Can songs save an endangered language?* written by Stephanie Vermillion. Published in 2022 by 'National Geographic Society' (US), a non-profit organization dedicated to funding science and exploration across the planet. The author is a travel and outdoors journalist, filmmaker, and photographer.

For centuries, Central America's Garifuna people have kept their history alive through their ancestors' native language.

Content removed due to copyright restrictions.

This kind of revival is a long, multi-generational road.

Document B Adapted from: *Protection of Cultural Heritage: The Nigerian experience*, written by Seun Lari-Williams and published in 2022 by 'The IP Press', a professional blog about intellectual property (IP) issues. The author is a litigation lawyer in Nigeria and an IP Consultant.

Recently, we have seen news about museums returning stolen artefacts to their country of origin. This has raised the topic of cultural heritage in Nigeria. The Nigerian National Commission for Museums and Monuments (NCMM) is finally receiving much-deserved attention.

According to UNESCO, cultural heritage includes products that can be touched and seen. Some examples are: architecture, paintings, textiles, pottery, books, and sculpture. It also includes aspects of life such as folklore, beliefs, music, dance, traditions, language, and knowledge. Culture is inherited from past generations. Cultural heritage is maintained for the benefit of future generations. Heritage is a source of identity and unity for communities. Cultural heritage can also attract tourists.

Nigeria has a rich cultural heritage, including, drama, music, poetry, and rituals. Places like the Nigerian National Museum and the Centre for Contemporary Art hold many examples of Nigerian heritage. These include paintings, sculptures, coins, and manuscripts.

The cultural heritage of Nigeria faces several challenges. The NCMM manages 51 museums and 65 national monuments and sites. However, Nigeria does not have the resources needed to protect the country's cultural heritage. UNESCO provides international funding and resources to promote culture and protect heritage sites. Nigeria has been managing its cultural heritage for seventy years. Yet, so far, UNESCO's World Heritage List only mentions two places in Nigeria: Osun-Osogbo Sacred Grove and Sukur Cultural Landscape. If Nigeria could get more places onto the list, we could receive more funding.

Colonialism is in the past, but it still impacts cultures and traditions. In colonized nations such as Nigeria, many heritage items were stolen by the colonists. Also, many temples which could have served as interesting heritage sites were destroyed.

Powerful multinational corporations have played a role in the entertainment industry of Nigeria. They have promoted western music and musical instruments, foreign dance styles and dress culture. This has negative impacts on traditional music, dance, and dancers in Nigeria. Also in the fashion industry, traditional clothes are being abandoned.

Another challenge is the mismanagement of cultural resources in Nigeria. This includes thefts from museums, illegal trading, and destruction of cultural heritage. The government, community leaders, academics, and law enforcement agencies do not pay enough attention to these problems. As a result, national monuments and heritage objects are not protected.

The law on cultural heritage is outdated. Nigeria's first law on cultural heritage was the NCMM Act of 1979. The National Assembly of Nigeria is currently discussing this law. Amending the law could reduce cultural heritage violations in Nigeria. The law could include fines and punishments for damaging heritage. Stronger measures and punishments are bound to improve the present situation. They should be welcomed.

Nigeria ranks high when it comes to cultural heritage. This article discussed some of the challenges faced regarding its protection. Nigeria's cultural heritage is vital to the history and culture of its people. However, protecting cultural heritage can be a challenge due to high costs. The Nigerian government should consider raising international awareness about Nigeria's heritage. It should push for recognition of Nigerian items of cultural heritage by UNESCO. Thus, it could gain access to several international funds.

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Cambridge International AS & A Level

GLOBAL PERSPECTIVES & RESEARCH **9239/11**

Paper 1 Written Exam **May/June 2025**

1 hour 30 minutes

You must answer on the enclosed answer booklet.

You will need: Answer booklet (enclosed)
Insert (enclosed)

INSTRUCTIONS

- Answer **all** questions.
- Follow the instructions on the front cover of the answer booklet. If you need additional answer paper, ask the invigilator for a continuation booklet.

INFORMATION

- The total mark for this paper is 45.
- The number of marks for each question or part question is shown in brackets [ ].
- The insert contains all the resources referred to in the questions.

This document has **4** pages. Any blank pages are indicated.

DC (KAS) 343988
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Read **both** documents in the accompanying insert and answer **all** the questions.

You should spend approximately 15 minutes reading **both** documents in the insert before attempting to answer the questions. This is allowed for in the time set for the exam.

Write brief answers to Question 1, using short sentences or bullet points.
Write your answers to Question 2 and Question 3 in continuous prose.

1 Study Documents A and B.

(a) The author of Document A discusses the role of music in saving an endangered language.

Identify **two** individual musicians who have tried to spread the Garifuna language and culture, as given by the author of Document A. [2]

(b) The author of Document B identifies several challenges to the protection of Nigeria's cultural heritage. These include a lack of funding and mismanagement of cultural resources.

Identify **three other** challenges to Nigeria's cultural heritage, as given by the author of Document B. [3]

2 Study Document A.

Assess the strengths and weaknesses of the evidence used by the author of Document A to support her argument that music might save the Garifuna language.

In your answer, include the impact of the evidence on the author's argument. [15]

3 Study Documents A and B.

The two authors present different arguments and perspectives on protecting cultural heritage.

Evaluate the arguments of both authors. In your answer, consider their perspectives and include a reasoned judgement about whether one argument is stronger than the other. [25]

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CAMBRIDGE
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GLOBAL PERSPECTIVES AND RESEARCH **9239/11**

Paper 1 Written Exam **May/June 2025**

MARK SCHEME

Maximum Mark: 45

Published

This mark scheme is published as an aid to teachers and candidates, to indicate the requirements of the examination. It shows the basis on which Examiners were instructed to award marks. It does not indicate the details of the discussions that took place at an Examiners' meeting before marking began, which would have considered the acceptability of alternative answers.

Mark schemes should be read in conjunction with the question paper and the Principal Examiner Report for Teachers.

Cambridge International will not enter into discussions about these mark schemes.

Cambridge International is publishing the mark schemes for the May/June 2025 series for most Cambridge IGCSE, Cambridge International A and AS Level components, and some Cambridge O Level components.

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PUBLISHED

Generic Marking Principles

These general marking principles must be applied by all examiners when marking candidate answers. They should be applied alongside the specific content of the mark scheme or generic level descriptions for a question. Each question paper and mark scheme will also comply with these marking principles.

GENERIC MARKING PRINCIPLE 1:

Marks must be awarded in line with:

- the specific content of the mark scheme or the generic level descriptors for the question
- the specific skills defined in the mark scheme or in the generic level descriptors for the question
- the standard of response required by a candidate as exemplified by the standardisation scripts.

GENERIC MARKING PRINCIPLE 2:

Marks awarded are always **whole marks** (not half marks, or other fractions).

GENERIC MARKING PRINCIPLE 3:

Marks must be awarded **positively**:

- marks are awarded for correct/valid answers, as defined in the mark scheme. However, credit is given for valid answers which go beyond the scope of the syllabus and mark scheme, referring to your Team Leader as appropriate
- marks are awarded when candidates clearly demonstrate what they know and can do
- marks are not deducted for errors
- marks are not deducted for omissions
- answers should only be judged on the quality of spelling, punctuation and grammar when these features are specifically assessed by the question as indicated by the mark scheme. The meaning, however, should be unambiguous.

GENERIC MARKING PRINCIPLE 4:

Rules must be applied consistently, e.g. in situations where candidates have not followed instructions or in the application of generic level descriptors.

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GENERIC MARKING PRINCIPLE 5: Marks should be awarded using the full range of marks defined in the mark scheme for the question (however; the use of the full mark range may be limited according to the quality of the candidate responses seen).
GENERIC MARKING PRINCIPLE 6: Marks awarded are based solely on the requirements as defined in the mark scheme. Marks should not be awarded with grade thresholds or grade descriptors in mind.

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Social Science-Specific Marking Principles
(for point-based marking)

1 Components using point-based marking:

- Point marking is often used to reward knowledge, understanding and application of skills. We give credit where the candidate's answer shows relevant knowledge, understanding and application of skills in answering the question. We do not give credit where the answer shows confusion.

From this it follows that we:

a DO credit answers which are worded differently from the mark scheme if they clearly convey the same meaning (unless the mark scheme requires a specific term)
b DO credit alternative answers/examples which are not written in the mark scheme if they are correct
c DO credit answers where candidates give more than one correct answer in one prompt/numbered/scaffolded space where extended writing is required rather than list-type answers. For example, questions that require *n* reasons (e.g. State two reasons …).
d DO NOT credit answers simply for using a 'key term' unless that is all that is required. (Check for evidence it is understood and not used wrongly.)
e DO NOT credit answers which are obviously self-contradicting or trying to cover all possibilities
f DO NOT give further credit for what is effectively repetition of a correct point already credited unless the language itself is being tested. This applies equally to 'mirror statements' (i.e. polluted/not polluted).
g DO NOT require spellings to be correct, unless this is part of the test. However spellings of syllabus terms must allow for clear and unambiguous separation from other syllabus terms with which they may be confused (e.g. Corrasion/Corrosion)

2 Presentation of mark scheme:

- Slashes (/) or the word 'or' separate alternative ways of making the same point.
- Semi colons (;) bullet points (•) or figures in brackets (1) separate different points.
- Content in the answer column in brackets is for examiner information/context to clarify the marking but is not required to earn the mark (except Accounting syllabuses where they indicate negative numbers).

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3 Calculation questions:

- The mark scheme will show the steps in the most likely correct method(s), the mark for each step, the correct answer(s) and the mark for each answer
- If working/explanation is considered essential for full credit, this will be indicated in the question paper and in the mark scheme. In all other instances, the correct answer to a calculation should be given full credit, even if no supporting working is shown.
- Where the candidate uses a valid method which is not covered by the mark scheme, award equivalent marks for reaching equivalent stages.
- Where an answer makes use of a candidate's own incorrect figure from previous working, the 'own figure rule' applies: full marks will be given if a correct and complete method is used. Further guidance will be included in the mark scheme where necessary and any exceptions to this general principle will be noted.

4 Annotation:

- For point marking, ticks can be used to indicate correct answers and crosses can be used to indicate wrong answers. There is no direct relationship between ticks and marks. Ticks have no defined meaning for levels of response marking.
- For levels of response marking, the level awarded should be annotated on the script.
- Other annotations will be used by examiners as agreed during standardisation, and the meaning will be understood by all examiners who marked that paper.

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Annotations guidance for centres

Examiners use a system of annotations as a shorthand for communicating their marking decisions to one another. Examiners are trained during the standardisation process on how and when to use annotations. The purpose of annotations is to inform the standardisation and monitoring processes and guide the supervising examiners when they are checking the work of examiners within their team. The meaning of annotations and how they are used is specific to each component and is understood by all examiners who mark the component.

We publish annotations in our mark schemes to help centres understand the annotations they may see on copies of scripts. Note that there may not be a direct correlation between the number of annotations on a script and the mark awarded. Similarly, the use of an annotation may not be an indication of the quality of the response.

The annotations listed below were available to examiners marking this component in this series.

Annotations

Annotation	Meaning
	**Correct, creditworthy point**. Used in Question 1 only.
	**Incorrect point.** Used in Question 1 only
	**Identify type of evidence. (**Without an example) Used in Q2 (AO1a)
	**Example of type of Evidence.** Used in Q2 (AO1a)
	**Strength or weakness of evidence** recognised but with limited explanation**.** Used in Q2 (AO1b)
	**Strength or weakness of evidence** clearly explained. Used in Q2 (AO1b)
	**Impact of evidence** is asserted and not explained. Used in Q2 (AO1c)
	**Shows undeveloped point**. Added to other annotations (EVAL, P, J and U in Q2 and Q3)

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Annotation	Meaning
EVAL	**Evaluation of impact of evidence** on argument/perspective and includes a judgement**.** Used in Q2 (AO1c)
K	**Identification of key component of argument.** Used in Q3 (AO1a)
C	**Comparison of key components** from both documents. Used in Q3 (AO1a)
P	**Identification of perspectives** with limited description**.** Used in Q3 (AO1b)
PD	**Analyses by comparing and describing perspectives in both documents.** Used in Q3 (AO1b)
PE	**Analyses by comparing and explaining perspectives in both documents.** Used in Q3 (AO1b)
ND	**Unsupported evaluation of argument.** Used in Q3 (AO1c)
EVAL	**Evaluation of argument** in both documents**.** Used in Q3 (AO1c)
U	**Unsupported judgement.** Used in Q3 (AO1d)
J	**Supported judgement.** Used in Q3 (AO1d). Can also be used in Q2
S	**Structured argument** Used in Q3 (AO3)
NAQ	**Not answering the question.**
REP	**Repetition.** When repeating a point as a summary or simply stating another example that does not develop the evaluation.
SEEN	To show that answers/pages have been assessed.
	**On Page Comment.** Used where necessary to clarify a decision.

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Instructions for examiners

The total mark for this paper is 45. **Question 1** assesses AO1 skills.

Question 2 assesses AO1 skills. **Question 3** assesses AO1 and AO3 skills.

Question 1 is points marked using ✓ or ✗. Answers to Question 1 can be brief, using short sentences or bullet points.

Answers to **Question 2 and Question 3** should be written in continuous prose.

For **Question 2 and Question 3** annotate clearly in the left-hand margin according to the specific instructions provided.

Refer to the marking grid at the end of each question to award a mark based on the annotations for each aspect (e.g. AO1a). Record the mark for each aspect (e.g. AO1a) in the right-hand marking panel on RM Assessor.

Indicative content or exemplar responses are provided as a guide. Inevitably, the mark scheme cannot cover all responses that candidates may make for all the questions. In some cases, candidates may make responses which the mark scheme has not predicted. These answers should nevertheless be credited according to their relevance and quality.

The definition of **perspective** used in this syllabus is: a perspective is a coherent world view which is a response to an issue. It is made up of argument, evidence, assumptions and may be influenced by a particular context.

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Question	Answer	Marks
1(a)	**The author of Document A discusses the role of music in saving an endangered language.** **Identify two individual musicians who have tried to spread the Garifuna language and culture, as given by the author of Document A.** The question assesses AO1. Answers to **Question 1** can be brief, using short sentences or bullet points. Show a correct answer with ✓ in the text, up to a maximum of two marks. • Andy Palacio • Kevin Ramirez • (either first name or family name or both is acceptable) Do **not** accept: • Alvin Laredo (a tour guide, but nothing says he is a musician) • The Garifuna Collective (a group of musicians) • Liliana Sanchez (a linguist) • Battle of the Drums (a music competition) • Another set of musicians (unnamed group)	**2**

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Question	Answer	Marks
1(b)	The author of Document B identifies several challenges to the protection of Nigeria's cultural heritage. These include a lack of funding and mismanagement of cultural resources. Identify **three other** challenges to Nigeria's cultural heritage, as given by the author of Document B. The question assesses AO1. Answers to **Question 1** can be brief, using short sentences or bullet points. Show a correct answer with ✓ in the text, up to a maximum of three marks. • **Colonialism** / Items stolen by **colonists** / Past losses or destruction of **heritage sites** / **temples** • Western Influence / Multi National Corporations / Traditional culture is replaced by external cultures (western music, dress, culture) / **traditional** clothes are being abandoned. • Outdated laws (challenge to protection, not directly to heritage) • Not enough access to **UNESCO** resources / not enough sites on **UNESCO** list / needs more sites on the **UNESCO** list • Nigeria does not have the resources needed to protect the • country's cultural heritage, (because there are large number of museums and sites) *(NOTE: "resources" could refer to more than just funding)* Do **not** accept: • Amending the law (response to challenge/solution) • Including fines and punishments (response to challenge) • Raising awareness (possible solution) • Lack of funding (already mentioned in the question) • Mismanagement of cultural resources (e.g. theft, illegal trading, destruction) (already mentioned in the question) • "Destruction of cultural heritage" • Theft (other than by colonists)	**3**

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Question	Answer	Marks

Instructions for Question 2

The question assesses AO1. (Research, analysis and evaluation)

Answers should be written in continuous prose. There is no requirement for candidates to use technical terms to access any level and candidates will NOT be rewarded for their use unless they link them directly to the assessment made. Annotate clearly in the left-hand margin according to the instructions provided below.

There are three aspects to consider when marking the answer:

- **Identify evidence (AO1a).** Candidates should identify a range of types of evidence and give examples. Annotate with **T** if no example given or **EG** if type is given **and** exemplified.

T	**Identify type of evidence.** (Without an example)
EG	**Example of type of evidence.**

- **Analyse strengths and weaknesses of evidence (AO1b).** Candidates should analyse both strengths and weaknesses of a range of evidence used by the author including an explanation. For **limited** explanation use **+** for strength and **–** for weakness. For clear explanation use **EXP**

+	**Strength of evidence** recognised but with limited explanation**.**
-	**Weakness of evidence** recognised but with limited explanation**.**
EXP	**Strength or weakness of evidence** clearly explained.

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Question	Answer	Marks

- **Evaluate evidence (AO1c).** Impact of evidence may be **asserted** and not explained **(A)** Evaluation may be **attempted** but not explained **(I ^)** (**I** and **^** are two separate annotations on RM). Candidates may **explain** the impact of evidence on the author's argument/perspective (**I**) and include a **judgement** of its effectiveness. **(I J)**

A	**Impact of evidence** is asserted and not explained.
I ^	**Shows undeveloped point of evaluation.** Evaluation attempted but not explained.
I	**Evaluation of impact of evidence** on argument/perspective**.**
I J	**Evaluation of impact of evidence** on argument/perspective and includes judgement**.**

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Marking grid for Question 2

Examiners should allocate a mark for each aspect (AO1a, AO1b, AO1c), using the mark descriptors and required annotations.

AO1a Identify evidence	**Mark**	**Annotations**
Identifies a wide range of different types of evidence with examples	5	4 **EG** or more
Identifies a range of different types of evidence with examples	4	3 **EG**
Identifies a limited range of different types of evidence with examples	3	2 **EG**
Identifies a limited range of evidence, using different types **or** examples	2	2**T** **or** 1**EG**
Identifies one type of evidence	1	1**T**
Identification of evidence is not present. No creditable material.	0	No **T** or No **EG**

AO1b Analyse strengths and weaknesses of evidence	**Mark**	**Annotations**
Analyses strengths and weaknesses of a wide range of evidence with clear explanation	5	2 **+** (or more) and 2 **–** (or more) with 2 or more **EXP**
Analyses strengths and weaknesses of a range of evidence with clear explanation	4	2 **+** and 1 **–** (**or opposite**) with 1 (or more) **EXP**
Analyses strengths and weaknesses of a range of evidence with limited explanation	3	2 **+** and 1 **–** (**or opposite**) with 0 **EXP**
Analyses strengths or weaknesses of a range of evidence with limited explanation	2	[2**+**] **or** [2**-**] **or** [1**+** **and** 1**-**]
Explanation of strengths **or** weaknesses of evidence is limited	1	[1**+**] **or** [1**-**]
No analysis is present. No creditable material	0	No **+** **or** **–** **or** **EXP**

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AO1c Evaluate evidence	**Mark**	**Annotations**
Evaluation includes explanation of the impact of evidence on the argument/ perspective and makes a range of reasoned judgements	5	**2 I** (or more) **and I J**
Evaluation includes explanation of the impact of evidence on the argument/ perspective and make a reasoned judgement	4	**2 I** (or more)
Evaluation includes an explanation of the impact of evidence on the argument/ perspective	3	**1 I**
Evaluation is attempted but lacks clarity, and the impact of evidence on the argument/perspective is not explained	2	**1 I ^** (or more)
The impact of evidence on the argument/perspective is asserted and not explained	1	**1 A** (or more)
No evaluation is present. No creditable material	0	No **A, I^, I or I J**

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AO1 Research, analysis and evaluation

Question	Answer	Marks
2	**Assess the strengths and weaknesses of the evidence used by the author of Document A to support her argument that music might save the Garifuna language.** **In your answer, include the impact of the evidence on the author's argument.** **Indicative content** No set answer is expected, and examiners should be flexible in their approach. Candidates may include some of the indicative content below. • *[annotated example]* **Good use of a range of relevant sources:** The author provides information and views from a range of **relevant and reliable sources**. **(+)** For information about endangered languages, she quotes UNESCO and Liliana Sanchez a linguist and professor. For information about the campaign to save the Garifuna culture and language through music, she turns to Alvin Laredo, (Garifuna tour guide) Andy Palacio (Garifuna singer and UNESCO Artist of Peace) and Kevin Ramirez (Garifuna musician and producer) **(EG).** These sources are reliable as they have relevant first-hand experience of the topic being discussed, which makes them experts in these questions as they have more experience than the author herself. **(EXP).** This in turn gives the reader confidence that the author she is not just presenting her own ideas and opinion, but that she is presenting a well-supported argument with backing and corroboration from reliable sources, because the reader can see that all the people mentioned are very close to the topic, and therefore the reader will believe what they say. **(I)** **Indicative list of possible strengths and weaknesses** This list is **not** exhaustive, and candidates may make other useful and correct comments about the evidence in the document	**15**

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Question	Answer	Marks
2	**Strengths** • **Place of Publication – Authoritative publication:** *National Geographic is a well-known organisation.* • **Place of Publication – Neutral publication**. *National Geographic is a non-profit, so may have no vested interest.* • **Background of Author** - *Experience in travel, therefore, knows about different societies.* • **Historical background** *(back to the 1600s) - helps reader to understand the context very clearly.* • **Use of figures** to illustrate scale of problem, *e.g. only 100 000 Garifuna speakers remain.* • Reference to **well-known and credible organisations** *e.g. UNESCO* • **Named sources**, e.g. *linguist Liliana Sanchez.* • **Credible sources,** *e.g. Andy Palacio is recognised as UNESCO Artist of Peace.* • Testimony from **relevant people with first-hand experience,** e.g. *Alvin Laredo is a Garifuna tour guide from Belize, Andy Palacio is a Garifuna musician. Kevin Ramirez is a Garifuna musician and producer based in New York,* • **Expert relevant academic sources,** e.g. *Liliana Sanchez is a professor at a named Uni (Illinois) who gives an expert opinion.* • The author provides **background information** to give the reader an understanding of how the Garifuna culture and language developed and then became endangered. • **Some direct quotes**, *e.g. "If you're losing your language, you're losing your roots"; "I'm Black, but the Black Americans didn't embrace me because I spoke Spanish. I spoke Spanish, but Latinos didn't embrace me because I'm Black."* • **Clear definitions** e.g. of Punta Rock, *"Traditional punta relies heavily on drums and maracas. It echoes the music of African ancestors. Punta rock is similar, but with a keyboard, electric guitar, and horns. It is the perfect mix for the world stage."* • **Relevant references to the connection between language and culture:** *Ramirez struggled with his identity. "I'm Black, but the Black Americans didn't embrace me because I spoke Spanish."* • **Relevant anecdotal evidence** from Kevin Ramirez about the difficulties he faced as an immigrant and how Garifuna music helped him to find an identity.	

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Question	Answer	Marks
2	**Weaknesses** • The **author's background** as a travel journalist and photographer is not strong on its own. She depends on others to provide her with views, information, and anecdotes. She is not a not a musician, not a musicologist, not an expert. • Some **vague** dates and time references: "*1600s", "late 1700s", "for two decades", "around that time"* • Some information is **not recent**, *e.g. UNESCO status in 2001, Garifuna Collective in 2007.* • Some information is **not dated**, e.g. *foundation of the Battle of the Drums* • Some **unidentified experts**, e.g. *"Linguists estimate that…"* • **Limited** use of **statistics** (only one: *100 000)* • **Estimated evidence, which may not be correct** e.g. *Linguists estimate that only 100 000 Garifuna speakers remain.* • **Rounded** or **vague figures**: *only 100 000 Garifuna speakers remain.* • **Unexplained ideas**: it is not explained how *"exile, decades of modernization, and intermarriage between cultures lead to loss of Garifuna Speakers"; "They help elementary and high schools in Belize teach the Garifuna culture and language through music and song."* • Some **reported speech** where **quotation** would be more convincing, e.g*. Liliana …. says that at-risk languages can be saved if they are used.* • **Some unspecified references: "***one of today's top Garifuna record labels"; "international music awards""* • Some **unexplained or vague** ideas, *'The Collective put Garifuna on the international map''; "history is passed down, not just by words, but by song and dance"; "make Garifuna Cool"* Some **unnamed or unspecified people***., e.g., "Another set of musicians…"*	

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Question	Answer	Marks

Instructions for Question 3

The question assesses AO1 (Research, analysis and evaluation) and AO3 (Communication).

Answers should be written in continuous prose. There is no requirement for candidates to use technical terms to access any level and candidates will NOT be rewarded for their use unless they link them directly to the assessment made.

A perspective is made up of argument, evidence and assumptions and may be influenced by a particular context.

Annotate clearly in the left-hand margin according to the instructions provided below.

There are five aspects to consider when marking the answer:

- **Identify and compare key components of arguments (AO1a).** Candidates should identify a range of key components of arguments from both documents. Annotate with **K** if key component is identified for one document and **C** if key component is compared for both documents.

K	**Identification of key component of argument** for one document
C	**Comparison of key components** from both documents.

- **Analyse and compare perspectives (AO1b).** Candidates should analyse by identifying, describing and explaining the perspectives given in both documents. **Identification only** (**P ^**), identification with **limited description** (**P**), **comparing** and **describing** in **both** documents (**PD**) and **comparing** and **explaining** in **both** documents (**PE**).

P ^	**Identification of perspectives** with no description**.**
P	**Identification of perspectives** with limited description**.**
PD	**Analyses by comparing and describing perspectives in both documents.**
PE	**Analyses by comparing and explaining perspectives in both documents.**

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Question	Answer	Marks

- **Evaluate arguments (AO1c).** Candidates should aim to evaluate key components of arguments with clearly illustrated and balanced reference to **both documents**. Evaluation may be **unsupported** (asserted) (**ND**). Evaluation includes illustration with reference to both documents. (**EVAL**)

ND	**Unsupported evaluation of argument.**
EVAL	**Evaluation of argument** in both documents**.**

- **Judgement about argument and perspective (AO1d).** Candidates should aim to give a reasoned and supported answer which includes intermediate conclusions and a main conclusion. The judgement may be **unsupported** (**U ^ or U**)**, partly supported** (**J ^**) **or clearly reasoned and supported** (**J**)

U ^	**Unsupported judgement –** stated only
U	**Unsupported judgement –** with reasoning
J ^	**Partly supported judgement** - with reasoning
J	**Supported judgement –** with reasoning

- **Communication (AO3)** A candidate should aim to produce a clearly expressed, well-structured and logical argument that is focused throughout on the question.

Structure should include introduction, clear paragraphs and conclusion, should flow and answer the question. Each paragraph should follow on logically and contain a separate point. Each new idea should be clearly indicated - preferably in a new paragraph.

"Logical" means that it is easy to follow the argument as there are no sudden changes of direction leading to confusion in the reader.

No annotation is required except **NAQ** to show not linking to the question. **The mark should be selected by using the guidance that follows the mark tables. Choose the most appropriate descriptor in the marking grid.**

NAQ	**Not answering the question**

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Marking grid for Question 3 - AO1 Research, analysis and evaluation

AO1a Identify and compare key components of arguments	**Mark**	**Annotations**
Compares a wide range of key components of arguments from both documents	5	3 **C** or more
Compares a range of key components of arguments from both documents	4	2 **C**
Compares a limited range of key components of arguments from both documents	3	1 **C**
Identifies key components of arguments with no comparison	2	2 **K** or more
Limited identification of key components of arguments with no comparison	1	1 **K**
No identification of arguments. No creditable material	0	No **K, C**

AO1b Analyse and compare perspectives	**Mark**	**Annotations**
Analyses by comparing and explaining the perspectives given in both documents	5	**1 PE** or more
Analyses by comparing and describing the perspectives given in both documents	4	**1 PD** or more
Identifies and compares both perspectives but with limited description	3	**2 P** (one for **each** Doc)
Identifies one perspective but with limited description	2	**P**
Identifies one perspective with no description	1	**P ^**
No identification of perspectives. No creditable material	0	**No P^, P, PD or PE**

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AO1c Evaluate arguments	**Mark**	**Annotations**
Evaluation of key components of arguments is illustrated by clear, balanced reference to both documents	5	**4 or more EVAL** (2 or more for each Doc)
Evaluation of key components of arguments is illustrated by clear reference to both documents but lacks balance	4	**3 or more EVAL** (at least one for each Doc)
Evaluation of key components of arguments with limited reference to both documents	3	**2 EVAL** (both docs) or 1 **EVAL** and **1 ND** (both docs)
Evaluation of arguments is unsupported (asserted) but refers to both documents	2	**2 ND** refers to both Docs
Evaluation of arguments is unsupported (asserted) and only refers to one document	1	**1 ND**
No evaluation is present. No creditable material	0	No **ND or EVAL**

AO1d Judgement about argument and perspective	**Mark**	**Annotations**
Judgement is clearly reasoned and supported. Includes intermediate conclusions and a main conclusion	5	**J or J ^** intermediate **and J** in the final conclusion
Judgement is clearly reasoned and supported. Includes **either** intermediate conclusion(s) **or** a main conclusion	4	**J** intermediate **or** in the final conclusion
Judgement is reasoned but is only partly supported. Includes **either** intermediate conclusion(s) **or** a main conclusion	3	**J ^** intermediate **or** in the final conclusion
Judgement is reasoned but not supported	2	**U**
Judgement is stated without reasons or support	1	**U ^**
No judgement is made. No creditable material	0	**No U^, U, J^ or J**

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AO3 Communication

Communication	Mark	Guidance
Produces a clearly written, well-structured and logical argument that is focused throughout on the question	5	Meets the descriptor – and contains no **NAQ**
Produces a clearly written, well-structured argument that links to the question	4	Meets the descriptor
Produces a clearly written argument with uneven structure that links to the question	3	Meets the descriptor
Produces an argument that lacks clarity and structure and does not always link to the question	2	Meets the descriptor
Communication is cursory or descriptive and lacks structure	1	Meets the descriptor
No creditable material	0	Meets the descriptor - **NAQ** throughout

Examiners should allocate a mark for each aspect (AO1a, AO1b, AO1c, AO1d and AO3), using the mark descriptors and required annotations.

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Guidance for awarding marks for AO3 in Question 3.

Note: 'clearly written' refers to the content and the ease of being able to follow the candidates' argument. It should be thought of as: "**clearly expressed**".

The quality of handwriting should not be considered as a factor when awarding marks. This is not what clearly written means in the descriptors.

If a candidate makes little attempt to answer the question and there are several instances of NAQ (e.g. was very descriptive or wrote an essay on their own opinion of the subject matter) the **maximum** score is **2 marks.**

If a candidate writes very little/ wrote in bullet points/has limited content that addresses the question the **maximum score** is **2 marks.**

If a candidate makes no attempt to develop an argument **at all**, the **maximum** score is 1 mark.

If a candidate writes in continuous prose, expressed themselves clearly and addressed the question, **start at 3 marks –** then consider if it better fits the descriptions above or below 3 marks. If the answer is **not** clearly expressed or **focussed mainly on one document**, it lacks clarity **and** has uneven structure and may only be worth **2 marks.**

If the answer has an introduction, clear paragraphs, considers **both documents in a balanced way,** reaches **a judgement** and generally links to the question it could be worth **4 marks.**

If the answer contains the criteria for 4 marks above, **is logical and has no irrelevant content (No NAQ)** it could be worth **5 marks**.

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Question	Answer	Marks
3	**The two authors present different arguments and perspectives on protecting cultural heritage.** **Evaluate the arguments of both authors. In your answer, consider their perspectives and include a reasoned judgement about whether one argument is stronger than the other.** No set answer is expected, and examiners should be flexible in their approach. Candidates may include some parts of the following indicative content. **Indicative content – Perspectives** • *[annotated example]* Both authors start from a similar viewpoint, that cultural heritage should be protected, and both focus on a specific cultural heritage. However, the loss of heritage is in a different context in the two documents. The difference between their two perspectives is that Doc A focuses on culture being lost by communities living abroad, whereas Doc B focuses on culture being lost within a country. Stephanie Vermillion (Doc A) focusses on a heritage of the Garifuna people, lost due mainly to exile and the impact of diaspora, **(PD)** whereas Seun Lari-Williams (Doc B) concentrates on national heritage within Nigeria, lost to impacts caused by incomers and lack of interest. **(PD)** • Though Doc A is written by someone from outside the culture (Stephanie Vermillion), she makes the argument more personal by concentrating on views and experiences of Garifuna people themselves; suggesting that they have found the solution and may be on the way to success. Stephanie may believe that saving a language through music is an important way of preserving cultural heritage. She may think that cultural heritage is one of the most important things we need to do for societies which struggle to survive in a globalising world. **(PE)** On the other hand in Doc B, Seun Lari-Williams presents his own view, as a Nigerian, from within the culture. However, he keeps the perspective more general and less personal, providing more detail on the causes of loss, suggesting that there needs to be a range of official approaches to addressing the problem. He believes this as he has studied how Nigerian cultural artefacts have been lost or damaged, so he has experience of this and he wants to change this, and he has studied how this change could occur. Lari-Williams has looked in detail at the loss of cultural heritage in Nigeria and believes that changes to the law are necessary to help halt this loss. **(PE)**	**25**

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Question	Answer	Marks
3	**Indicative content - Arguments** No set answer is expected, and examiners should be flexible in their approach. At each point of comparison, **candidates may argue that either Document is stronger, or they are equally strong**. Candidates may include some of the following indicative content. • *[annotated example]:* **Named Sources:** Stephanie Vermillion (Doc B) makes more use of information and views from **named sources;** about relevant details of the campaign to save the Garifuna culture and language, from Alvin Laredo, and Kevin Ramirez, as well as general information about endangered languages from an expert: Liliana Sanchez a linguist and professor. This supports her argument that music can save an endangered culture. **(EVAL)** However, Seun Lari-Williams (Doc B) argument is less well-supported. **(C)** He refers to bodies such as UNESCO but depends on his own knowledge for most information about Nigeria, providing no sources for the majority of the information and views provided. So, the reader is less clear about whether the information provided in Doc B is reliable. **(EVAL)** The use of a range of named sources makes Doc A stronger than Doc B. **(J)** **Indicative list of components of the argument.** This list is **not** exhaustive, and candidates may make other useful and correct comments about components of the argument. • **Background of the author**: Doc B is written by Seun Lari-Williams, a Nigerian litigation lawyer and IP Consultant. This gives him the ability to see, personal experience and knowledge of the situation in Nigeria. Whereas Stephanie Vermillion (Doc A) is a travel journalist without stated links to Central America or the Garifuna people. • **Place of publication:** Doc B appears in a blog about IP issues, which does not seem to have much connection to the topic. Doc A appears in National Geographic, which is perhaps more closely relevant to the subject. • **Date of publication and of evidence:** Both docs were published in 2022, so both quite recent. However, Doc A does not include any recently dated evidence. Doc B mentions news reported "recently" but does not elaborate on this and does not include any other dates. • **Definitions of ideas and concepts:** Doc B has clear definitions and examples of "cultural heritage" including Nigeria's "rich heritage"; Doc A defines "punta rock" and also gives examples of "Garifuna culture" • **Use of named sources:** Doc A has individual people as named sources: Alvin Laredo (tour guide), Liliana Sanchez (academic), Andy Palacio (musician), Kevin Ramirez (musician). There are no individual named sources in Doc B.	

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Question	Answer	Marks
3	• **References to named places:** Only two places are mentioned in Doc B: Osun-Osogbo Sacred Grove and Sukur Cultural Landscape. There are multiple geographical references in Doc A. • **Reference to international organisations:** Both docs refer to UNESCO. • **Historical background information** Doc A has clearer background, explaining about history of exile of Garifuna people. Doc B tells us colonialism is in the past but gives little detail about this. • **Limited geographical scope:** Both Docs focus primarily on one culture or country, but Doc A does also refer to other areas of North and Central America. Doc B makes only passing reference to "colonised countries such as Nigeria": other countries in Africa are not mentioned at all. • **Some broad and unsupported claims:** Doc B claims that "Heritage is a source of identity and unity for communities. Cultural heritage can also attract tourists". Doc A claims that "the Collective put Garifuna on the international map". Neither of these is well supported. • **Use of quantitative data:** There is not much of this in either document. Doc A mentions a rounded number: 100 000 Garifuna Speakers. Doc B mentions 51 museums and 65 national monuments and sites. • **Some clear explanations:** Though the two documents concentrate on different aspects of the issue, they both provide clear explanations: Doc A explains the ways music is being used to revive the Garifuna language; Doc B explains the challenges to Nigerian cultural heritage. • **Some vague or unspecified examples:** Doc A mentions "one of today's top Garifuna record labels" but does not name it. Doc B mentions "temples which could have served as interesting heritage sites" but does not name them. • **Some ideas or concepts are not explained, elaborated or exemplified**, especially in Doc B, where it is claimed that western fashion has reduced the use of traditional clothes. • **Clear call to action:** Doc B makes it clear what action should be taken (last paragraph). Doc A is less clear about this. • **Lack of Counterargument:** Neither provides any counterargument nor opposing perspective on their argument. • **Style of Writing:** Doc B is written in a mostly formal and factual style, while Doc A includes more informal language. "you're losing your roots"; "cool"; "punta rock did just that" and relates to the reader in a more familiar and emotive way, e.g. "Will music Save the Garifuna language? Time will tell."	

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Question	Answer	Marks
3	**Indicative content - Judgement** *[annotated example]* A candidate may conclude that Doc B is stronger because Seun Lari-Williams' provenance is stronger, he is based in Nigeria, has local knowledge, and understands the history and current situation from an insider's point of view; whereas Doc A is written by a journalist who is providing others' views to make her argument. **(J)** A candidate may conclude that Doc A is stronger because Stephanie Vermillion provides more varied evidence from a range of different sources, with personal insights from Garifuna people. Meanwhile, Doc B provides a range of evidence, often in the form of lists, with no sources for much of the information about Nigeria. Neither Doc A or Doc B is stronger, they have a similar narrow focus on one culture, without a global view. Both blame colonialism for loss of cultural heritage. At the same time they are focussed on very different contexts of loss of cultural heritage, one in diaspora and one internal and at state level.	

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Cambridge Assessment International Education

Cambridge International AS & A Level

GLOBAL PERSPECTIVES & RESEARCH **9239/01**

Paper 1 Written Exam **For examination from 2023**

SPECIMEN INSERT **1 hour 30 minutes**

0123456789

INFORMATION

- This insert contains all the resources referred to in the questions.
- You may annotate this insert and use the blank spaces for planning. **Do not write your answers** on the insert.

This document has **4** pages. Any blank pages are indicated.

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The documents below consider issues related to medical ethics and priorities. Read them both in order to answer all the questions on the paper.

Document A: adapted from 'Robot niche expands in senior care', an article written by Mai Iida, published in the *Japan Times* in 2013. The author is a journalist.

Japan's population is ageing rapidly. So, more practical and affordable robots are being developed to help senior citizens handle daily tasks and to cope with a predicted shortage of caregivers (care workers).

The Japanese government estimates that the number of people in Japan aged 65 years or above will rise by around 7 million between 2010 and 2025, when they will be 30% of the overall population. The government predicts that around 2.5 million caregivers will be required to look after the elderly. The government also reports that many caregivers have to give up work. This is because 70% of them suffer from back pain due to constantly lifting the elderly between beds and wheelchairs.

The government has allocated ¥2.4 billion ($24 million) in the 2013 budget to help develop nursing care robots and increase their use. The Japanese Ministry of Economy, Trade and Industry (METI) will give substantial financial help to 24 companies to develop 'nursing care robot equipment'. This includes the development of a device to help carry the elderly, a mobile flush lavatory and a wireless sensor to help track senior citizens who wander off.

The deputy director of METI's industrial machinery division noted that high prices have been a major problem in introducing nursing care robots for the elderly, with some of the machines costing over ¥10 million. He said, 'We aim to offer cheap robots widely, costing between ¥100,000 and ¥200,000. By 2018, the subsidised production should greatly increase and so people will be able to afford them. We aim to achieve a situation where every senior citizens' home will have at least one robot.'

The evidence of using communication robots so far has been very positive. At the Fuyouen senior citizens' home in Yokohama, a humanoid 40 cm-tall robot sings, dances and plays games and quizzes with the residents. The caregivers at the home noticed that these robots have a positive psychological effect, bringing smiles to the faces of even clinically-depressed residents. An 88-year-old resident said, 'I learned a lot from him.' A 92-year-old resident told a baby seal robot, 'You're so cute, look at me!' It responded by moving its head and legs, squealing and blinking its eyes.

Referring to these communication robots, the head of the Fuyouen home said, 'I find them very effective.' He also hopes that practical robots will be developed to help caregivers lift and carry elderly residents. 'I think caring, and the warmth of physical contact can never be replaced by robots. But with many in the nursing care industry suffering from back pain, I am hoping that robots will be developed to enable caregivers to work longer.' One caregiver said that if practical robots are developed to interact with human beings, this will widen the nursing care services they can offer.

Given this evidence, it is clear that there is an increasing need to design more practical and affordable robots to help senior citizens with daily tasks, as well as to cope with a projected shortage of caregivers. So, we need to recognise the benefits that these robots will bring.

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Document B: adapted from 'Legal and Ethical Issues relating to Healthcare Robots', an online article written by Dr Catherine Easton in 2013, on the UK-based Society of Computers and Law website. The author is a UK university lecturer in Law.

Robots can now provide a realistic solution to certain aspects of healthcare provision. Robotic mobility aids, such as wheelchair robots and manipulator arms, are used in physical therapy. Also, emotional and psychological support can be given by systems designed to help children's rehabilitation through interaction and storytelling.

The time has now come that we need to look at legal and ethical issues relating to the use of robotics in healthcare, because of their planned rapid development and the risk that this brings. Robot development has been driven by the growing ageing population and a global need to cut the cost of health care. The US Government's '*Roadmap for US Robotics*' highlights the potentially significant economic benefits from using robotics in healthcare. Over a hundred US hospitals advertise robotic surgery, often focusing on its benefits, but overlooking potential risks.

Firstly, there are problems of safety standards and legal responsibility. Safety standards need to be flexible to keep up with technology. In 2005 the International Standards Organisation set safety standards for non-medical personal care robots. Also, when Professor Asaro presented research at the 2007 International Conference on Robotics and Automation, he said legal responsibility for healthcare robots could be the same as for any other manufactured product. However, in healthcare it is more difficult to predict the behaviour of the humans with whom the robot is interacting, especially children. Also, who is responsible if a robotic system malfunctions and a patient, medical practitioner or equipment is damaged? It is possible to blame designers, programmers, medical staff and even the patient.

Another problem is of trust. Robots in the healthcare environment will not be successful if they are not fully trusted by both patients and practitioners. Patients need to feel comfortable with the technology and be able to rely upon it. In Japan, where over 23% of the population is aged 65 and above, there is a great shortage of care workers. Even in Japan, which has led the way in robotic development, responses to robot aides have not been entirely positive. Certain systems have been removed from hospitals for ethical reasons due to patients' lack of trust and their desire for human interaction.

Finally, there is a problem of psychological bonding. When patients use robots daily, they can project human qualities onto the robots and feel a bond. In terms of ethics, a patient who feels a personal attachment to a robot may become distressed if the robot's behaviour changes. Researchers from MIT speaking at the We Robot Conference, University of Miami, argued that if a robot is damaged or even reprogrammed this could have a detrimental effect on the mental well-being of its user. So, healthcare workers need to be aware of the possible problems of patients bonding with robots.

These problems of legal responsibility, safety standards, trust and psychological bonding need to be solved before healthcare robotics can provide a realistic solution. So, in the meantime, questions need to be raised about the ethics of using healthcare robots.

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Copyright Acknowledgements:

Document A © Adapted: Mai Iida; *Robot niche expands in senior care*; The Japan Times; June 2013
Document B © Adapted: Dr Catherine Easton; *Carry on Automaton: Legal and Ethical issues relating to Healthcare Robots*; SCL; May 2013

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Cambridge Assessment International Education

Cambridge International AS & A Level

GLOBAL PERSPECTIVES & RESEARCH **9239/01**

Paper 1 Written Exam **For examination from 2023**

MARK SCHEME

Maximum Mark: 45

Specimen

This document has **12** pages. Any blank pages are indicated.

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Generic Marking Principles

These general marking principles must be applied by all examiners when marking candidate answers. They should be applied alongside the specific content of the mark scheme or generic level descriptors for a question. Each question paper and mark scheme will also comply with these marking principles.

GENERIC MARKING PRINCIPLE 1:

Marks must be awarded in line with:

- the specific content of the mark scheme or the generic level descriptors for the question
- the specific skills defined in the mark scheme or in the generic level descriptors for the question
- the standard of response required by a candidate as exemplified by the standardisation scripts.

GENERIC MARKING PRINCIPLE 2:

Marks awarded are always **whole marks** (not half marks, or other fractions).

GENERIC MARKING PRINCIPLE 3:

Marks must be awarded **positively**:

- marks are awarded for correct/valid answers, as defined in the mark scheme. However, credit is given for valid answers which go beyond the scope of the syllabus and mark scheme, referring to your Team Leader as appropriate
- marks are awarded when candidates clearly demonstrate what they know and can do
- marks are not deducted for errors
- marks are not deducted for omissions
- answers should only be judged on the quality of spelling, punctuation and grammar when these features are specifically assessed by the question as indicated by the mark scheme. The meaning, however, should be unambiguous.

GENERIC MARKING PRINCIPLE 4:

Rules must be applied consistently, e.g. in situations where candidates have not followed instructions or in the application of generic level descriptors.

GENERIC MARKING PRINCIPLE 5:

Marks should be awarded using the full range of marks defined in the mark scheme for the question (however; the use of the full mark range may be limited according to the quality of the candidate responses seen).

GENERIC MARKING PRINCIPLE 6:

Marks awarded are based solely on the requirements as defined in the mark scheme. Marks should not be awarded with grade thresholds or grade descriptors in mind.

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Social Sciences and Humanities Subject-Specific Marking Principles
(for point-based marking)

1 Components using point-based marking

- Point marking is often used to reward knowledge, understanding and application of skills. We give credit where the candidate's answer shows relevant knowledge, understanding and application of skills in answering the question. We do not give credit where the answer shows confusion.

From this it follows that we:

a DO credit answers which are worded differently from the mark scheme if they clearly convey the same meaning (unless the mark scheme requires a specific term).
b DO credit alternative answers/examples which are not written in the mark scheme if they are correct.
c DO credit answers where candidates give more than one correct answer in one prompt/ numbered/scaffolded space where extended writing is required rather than list-type answers. For example, questions that require n reasons (e.g. State two reasons …).
d DO NOT credit answers simply for using a 'key term' unless that is all that is required. (Check for evidence it is understood and not used wrongly.)
e DO NOT give further credit for what is effectively repetition of a correct point already credited unless the language itself is being tested. This applies equally to 'mirror statements' (i.e. polluted/not polluted).
f DO NOT require spellings to be correct, unless this is part of the test. However spellings of syllabus terms must allow for clear and unambiguous separation from other syllabus terms with which they may be confused (e.g. corrasion/corrosion).

2 Presentation of mark scheme

- Slashes (/) or the word 'or' separate alternative ways of making the same point.
- Semi colons (;), bullet points (•) or figures in brackets (1) separate different points.

3 Annotation

- For point marking, ticks can be used to indicate correct answers and crosses can be used to indicate wrong answers.
- For levels of response marking, the level awarded should be annotated on the script.
- Other annotations will be used by examiners as agreed during standardisation, and the meaning will be understood by all examiners who marked that paper.

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Instructions for examiners

The total mark for this paper is 45.

Question 1 assesses AO1 skills.
Question 2 assesses AO1 skills.
Question 3 assesses AO1 and AO3 skills.

Question 1 is points marked. Answers to Question 1 can be brief, using short sentences or bullet points.

Answers to Question 2 and Question 3 should be written in continuous prose.

For Question 2 and Question 3, award a mark for each aspect of each AO separately using the marking grids. To use the marking grid, start from the top level for each aspect and read down until you meet the level that suits the response.

Indicative content or exemplar responses are provided as a guide. Inevitably, the mark scheme cannot cover all responses that candidates may make for all of the questions. In some cases candidates may make responses which the mark scheme has not predicted. These answers should nevertheless be credited according to their quality.

The definition of **perspective** used in this syllabus is: a perspective is a coherent world view which is a response to an issue. It is made up of argument, evidence, assumptions and may be influenced by a particular context.

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Question	Answer	Marks
1(a)	**The author of Document A mentions different types of robot.** **Identify <u>two</u> robots that are already being used.** The question assesses AO1. Answers to Question 1 can be brief, using short sentences or bullet points. Show a correct answer with ✓ in the text up to a maximum of two marks. *Any **two** of the following:* • 40 cm-tall humanoid robot • Baby seal robot • Communication robot Do not accept: • Practical robots (examples of nursing care robots such as carry, flush, track, as these are being developed so are not currently in use)	**2**
1(b)	**The author of Document B refers to a range of ethical issues with using healthcare robots.** **Identify <u>three</u> ethical issues mentioned by the author.** The question assesses AO1. Answers to Question 1 can be brief, using short sentences or bullet points. Show a correct answer with ✓ in the text up to a maximum of three marks. *Any **three** of the following:* • Potential risks • Psychological bonding • Lack of trust • Desire for human interaction • Can cause distress • Detrimental effect on mental well-being Do not accept: • Lack of legal responsibility (these are legal issues not ethical ones) • Problems of safety standards (these are safety issues not ethical ones)	**3**

Marking grids for Question 2

Examiners should allocate a mark for each aspect of AO1 (AO1a, AO1b, AO1c), using the mark descriptors.

AO1 Research, analysis and evaluation

AO1a Identify evidence	**Mark**
Identifies a wide range of different types of evidence with examples	5
Identifies a range of different types of evidence with examples	4
Identifies a limited range of different types of evidence with examples	3
Identifies a limited range of evidence, using different types **or** examples	2
Identifies one piece of evidence	1
Identification of evidence is not present. No creditable material.	0

AO1b Analyse strengths and weaknesses of evidence	**Mark**
Analyses strengths and weaknesses of a wide range of evidence with clear explanation	5
Analyses strengths and weaknesses of a range of evidence with clear explanation	4
Analyses strengths and weaknesses of a range of evidence with limited explanation	3
Analyses strengths **or** weaknesses of a range of evidence with limited explanation	2
Explanation of strengths **or** weaknesses of evidence is limited	1
No analysis is present. No creditable material	0

AO1c Evaluate evidence	**Mark**
Evaluation includes explanation of the impact of evidence on the argument/perspective and makes a wide range of reasoned judgements	5
Evaluation includes explanation of the impact of evidence on the argument/perspective and makes reasoned judgements	4
Evaluation includes an explanation of the impact of evidence on the argument/perspective	3
Evaluation is attempted but lacks clarity, and the impact of evidence on the argument/ perspective is not explained	2
The impact of evidence on the argument/perspective is asserted and not explained	1
No evaluation is present. No creditable material	0

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Question	Answer	Marks
2	**Assess the strengths and weaknesses of the evidence used by the author of Document A to support their claims about the development of robotic healthcare equipment.** **In your answer include the impact of the evidence on the author's argument.** The question assesses AO1. Answers to Question 2 should be written in continuous prose. Use the **Marking grids for Question 2** to assess Question 2. There is no requirement for candidates to use technical terms to access any level and candidates will NOT be rewarded for their use unless they link them directly to the assessment made. No set answer is expected, and examiners should be flexible in their approach. Candidates may include some of the following indicative content. **Indicative content** **Strengths** • [Example only] **Evidence from first-hand sources:** (Head of the Fuyouen senior citizens' home, caregivers and two residents of the home.) All have experience of using communication robots and explain how useful they are as they have the ability to see. This gives the reader confidence that the author's argument is supported by reliable sources who know what they are talking about. • **Use of expert sources:** e.g. deputy director of METI and use of official sources e.g. Japanese government. • **Plausible evidence:** e.g. projected growth of caregivers required. • **Use of statistics:** e.g. '30% of the overall population ...' and '... allocated ¥2.4 billion ...' • **Selection of evidence:** the author has no apparent vested interest as she is reporting the story as a journalist. • **Motive to be accurate:** as a journalist she would aim to preserve her reputation and that of the Japan Times. **Weaknesses** • **Lack of representativeness:** e.g. experience of the one reported care home may not be typical in Japan or in the wider world. • **Lack of balance:** e.g. limited evidence of drawbacks of using robots in care homes. Selected evidence is for the use of robots in care homes. • **Absence of context for quantitative data:** e.g. population statistics (Without knowing the total population of Japan we do not know whether 30% of the overall population is a high or low number.) • **Some vague statistics:** e.g. robots costing between ¥100 000 and ¥200 000 which is a wide range. • **Some estimated statistics:** e.g. The Japanese government estimates that the number of people over 65 will rise by about 7 million ... • **Unreliable sources:** e.g. elderly residents may not have a detailed understanding of the value of the robots.	**15**

Marking grids for Question 3

Examiners should allocate a mark for each aspect of AO1 (AO1a, AO1b, AO1c, AO1d) and AO3, using the mark descriptors.

AO1 Research, analysis and evaluation

AO1a Identify and compare key components of arguments	**Mark**
Compares a wide range of key components of arguments from both documents	5
Compares a range of key components of arguments from both documents	4
Compares a limited range of key components of arguments from both documents	3
Identifies key components of arguments with no comparison	2
Limited identification of key components of arguments with no comparison	1
No identification of arguments. No creditable material	0

AO1b Analyse and compare perspectives	**Mark**
Analyses by comparing and explaining the perspectives given in both documents	5
Analyses by comparing and describing the perspectives given in both documents	4
Identifies and compares both perspectives but with limited description	3
Identifies one perspective but with limited description	2
Identifies one perspective with no description	1
No identification of perspectives. No creditable material	0

AO1c Evaluate arguments	**Mark**
Evaluation of key components of arguments is illustrated by clear, balanced reference to both documents	5
Evaluation of key components of arguments is illustrated by clear reference to both documents but lacks balance	4
Evaluation of key components of arguments with limited reference to both documents	3
Evaluation of arguments is unsupported (asserted) but refers to both documents	2
Evaluation of arguments is unsupported (asserted) and only refers to one document	1
No evaluation is present. No creditable material	0

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AO1d Judgement about argument and perspective	**Mark**
Judgement is clearly reasoned and supported. Includes intermediate conclusions and a main conclusion	5
Judgement is clearly reasoned and supported. Includes **either** intermediate conclusion(s) **or** a main conclusion	4
Judgement is reasoned but is only partly supported. Includes **either** intermediate conclusion(s) **or** a main conclusion	3
Judgement is reasoned but not supported	2
Judgement is stated without reasons or support	1
No judgement is made. No creditable material	0

AO3 Communication

Communication	**Mark**
Produces a clearly written, well-structured and logical argument that is focused throughout on the question	5
Produces a clearly written, well-structured argument that links to the question	4
Produces a clearly written argument with uneven structure that links to the question	3
Produces an argument that lacks clarity and structure and does not always link to the question	2
Communication is cursory or descriptive and lacks structure	1
No creditable material	0

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Question	Answer	Marks
3	**The two authors present different arguments and perspectives about the development of robotic healthcare equipment.** **Evaluate the arguments of both authors. In your answer, consider their perspectives and include a reasoned judgement about whether one argument is stronger than the other.** The question assesses AO1 and AO3. Answers to Question 3 should be written in continuous prose. Use the **Marking grids for Question 3** to assess Question 3. There is no requirement for candidates to use technical terms to access any level and candidates will NOT be rewarded for their use unless they link them directly to the assessment made. By perspective we mean a coherent world view in response to an issue. A perspective is different from a theme. No set answer is expected, and examiners should be flexible in their approach. Candidates may include some of the following indicative content. **Indicative content – Perspectives** Doc A has a limited perspective as it only considers the use of robots in healthcare in Japan, in particular in one named care home. Doc B is more international with reference to the US as well as Japan and includes evidence from the International Conference on Robotics and Automation. Doc A only considers the positive outcomes of using robots in healthcare and has a definitive conclusion which lacks balance. Doc B gives the benefits of robots in healthcare but then considers the counterargument relating to legal, safety and ethical concerns leading to a more open conclusion. **Indicative content – Arguments** No set answer is expected, and examiners should be flexible in their approach. At each point of comparison, candidate may argue that either Document is stronger, or they are equally strong. Candidates may include some of the following indicative content. [Examples only]: **Provenance:** The author of Doc B (Easton) is a UK university lecturer. Her academic credentials (she has a doctorate) and the reliable place of publication (Society of Computers and Law website) strengthen the argument, because we trust academic expertise. Whereas the author of Doc A (Mai Lida) is a journalist with no specified academic background or specialism in robotics, which makes it weaker. Therefore, Doc B is stronger than Doc A as it has a stronger provenance. **Global scope:** Doc B has a wider scope with reference to US, Japan and an international conference whereas Doc A is narrowly focussed on Japan.	**25**

Question	Answer	Marks
3	**Sources of evidence:** Both Doc A and Doc B draw evidence from other sources. Doc A uses more first-hand evidence (e.g. care home residents and caregivers) whereas Doc B uses more expert sources like Professor Asaro. **Structure of argument:** Both Doc A and Doc B have clear conclusions and a well-structured argument. **Language style:** Doc A has more emotional appeal, including quotations and the human factor which could be more convincing to some readers. Doc B has a more academic style that appears to be more serious and focussed on detailed concerns that some readers would find stronger than Doc A. **Counter argument:** Doc B has a counterargument whereas Doc A is one sided (looking only at benefits) **Use of statistics:** Doc A uses more statistical evidence, which although rounded and estimated is stronger than the more qualitative statements made by the author of Doc B. **Indicative content – Judgement** A candidate may conclude that Document B is stronger as it has a clear academic structure and a reliable provenance. It has a wider global scope than Document A and addresses a counterargument which Document B doesn't. A candidate may conclude that Document A has a stronger argument as it has more emotional appeal by including first-hand evidence and personal reflections on equipment that has a benefit to residents and carers. It also uses more statistical information that adds more support to the reliability of the argument, making it stronger overall. A candidate may conclude that both documents have their strengths and weaknesses and, on balance, both arguments are valid and so neither is particularly stronger than the other. Both have clear conclusions and a structured argument. Both use official government sources to give strength to their argument.	

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Cambridge Assessment International Education

Syllabus

Cambridge International AS & A Level Global Perspectives & Research 9239

Use this syllabus for exams in 2023, 2024 and 2025.
Exams are available in the June and November series.
Exams are also available in the March series in India only.



Version 1

Cambridge Pathway

Why choose Cambridge International?

Cambridge International prepares school students for life, helping them develop an informed curiosity and a lasting passion for learning. We are part of the University of Cambridge.

Our Cambridge Pathway gives students a clear path for educational success from age 5 to 19. Schools can shape the curriculum around how they want students to learn – with a wide range of subjects and flexible ways to offer them. It helps students discover new abilities and a wider world, and gives them the skills they need for life, so they can achieve at school, university and work.

Our programmes and qualifications set the global standard for international education. They are created by subject experts, rooted in academic rigour and reflect the latest educational research. They provide a strong platform for students to progress from one stage to the next, and are well supported by teaching and learning resources.

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Our mission is to provide educational benefit through provision of international programmes and qualifications for school education and to be the world leader in this field. Together with schools, we develop Cambridge learners who are confident, responsible, reflective, innovative and engaged – equipped for success in the modern world.

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Important: Changes to this syllabus

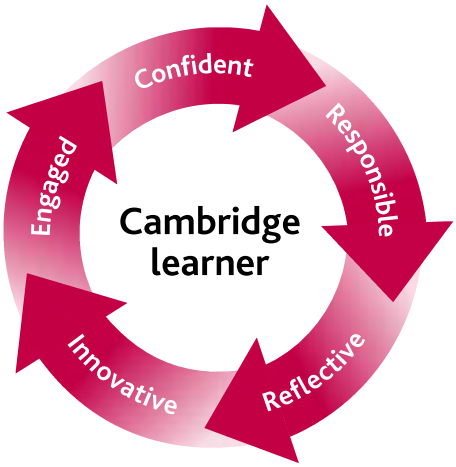
For information about changes to this syllabus for 2023, 2024 and 2025, go to page 35.

Any textbooks endorsed to support the syllabus for examination from 2023 are suitable for use with this syllabus.

1 Why choose this syllabus?

Key benefits

The best motivation for a student is a real passion for the subject they're learning. By offering students a variety of Cambridge International AS & A Levels, you can give them the greatest chance of finding the path of education they most want to follow. With over 50 subjects to choose from, students can select the ones they love and that they're best at, which helps motivate them throughout their studies.



Following a Cambridge International AS & A Level programme helps students develop abilities which universities value highly, including:

- a deep understanding of their subjects
- higher order thinking skills – analysis, critical thinking, problem solving
- presenting ordered and coherent arguments
- independent learning and research.

Cambridge International AS & A Level Global Perspectives & Research develops a set of transferable skills. These include critical thinking, deconstructing and differentiating arguments, evaluating claims and developing strong reasoning. Learners can apply these skills across a range of subjects and complex real-world issues. These skills equip students well for progression to higher education or directly into employment.

Our approach in Cambridge International AS & A Level Global Perspectives & Research encourages learners to be:

confident, explaining, analysing and evaluating global issues and communicating arguments

responsible, researching extensively and selecting suitable material from a globally diverse range of sources, directing their own learning

reflective, developing a critical awareness of their personal standpoint and how that impacts on their response to different opinions and diverse ways of thinking

innovative, thinking creatively to propose solutions to issues

engaged, working collaboratively to develop each individual's potential in pursuit of a common goal.

'Cambridge students develop a deep understanding of subjects and independent thinking skills.'

Principal, Rockledge High School, USA

International recognition and acceptance

Our expertise in curriculum, teaching and learning, and assessment is the basis for the recognition of our programmes and qualifications around the world. Every year thousands of students with Cambridge International AS & A Levels gain places at leading universities worldwide. Our programmes and qualifications are valued by top universities around the world including those in the UK, US (including Ivy League universities), Europe, Australia, Canada and New Zealand.

UK NARIC, the national agency in the UK for the recognition and comparison of international qualifications and skills, has carried out an independent benchmarking study of Cambridge International AS & A Level and found it to be comparable to the standard of AS & A Level in the UK. There is no similarly focussed subject to AS & A Level Global Perspectives & Research in the UK.

Cambridge International AS & A Level Global Perspectives & Research is interdisciplinary and has a strong focus on the acquisition of skills.

Cambridge International AS Level Global Perspectives & Research makes up the first half of the Cambridge International A Level course and provides a foundation for the study of Global Perspectives & Research at Cambridge International A Level. Depending on local university entrance requirements, it may permit or assist progression directly to university courses in a range of subjects. It is also suitable as part of a course of general education.

The skills developed by Cambridge International A Level Global Perspectives & Research provide a foundation for a wide range of courses in higher education. Equally it is suitable as part of a course of general education.

For more information about the relationship between the Cambridge International AS Level and Cambridge International A Level see the 'Assessment overview' section of the Syllabus overview.

We recommend learners check the Cambridge recognitions database and university websites to find the most up-to-date entry requirements for courses they wish to study.

Learn more at **www.cambridgeinternational.org/recognition**

'The depth of knowledge displayed by the best A Level students makes them prime targets for America's Ivy League universities.'

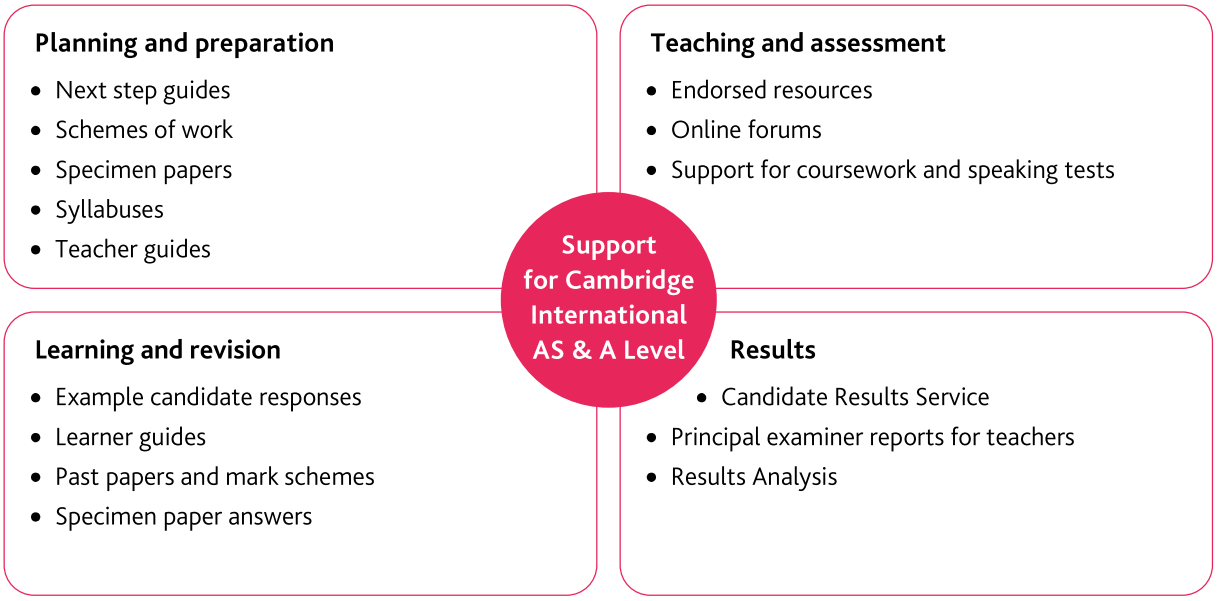
Yale University, USA

Supporting teachers

We provide a wide range of resources, detailed guidance and innovative training and professional development so that you can give your students the best possible preparation for Cambridge International AS & A Level. To find out which resources are available for each syllabus go to our School Support Hub.

The School Support Hub is our secure online site for Cambridge teachers where you can find the resources you need to deliver our programmes. You can also keep up to date with your subject and the global Cambridge community through our online discussion forums.

Find out more at **www.cambridgeinternational.org/support**



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- Cambridge Professional Development Qualifications

Find out more at **www.cambridgeinternational.org/profdev**

Supporting exams officers

We provide comprehensive support and guidance for all Cambridge exams officers. Find out more at: **www.cambridgeinternational.org/eoguide**

2 Syllabus overview

Aims

The aims describe the purposes of a course based on this syllabus.

The aims are to enable students to:

- acknowledge and understand the diversity of perspectives on global issues
- develop the ability to evaluate claims and evidence
- make independent judgements supported by reasoning and evidence, and understand the importance of justifying their own opinions
- become effective researchers, using appropriate sources to support judgements and understanding of research processes
- develop their ability to reflect on their own learning and judgements and on their work with others
- develop a range of effective written and spoken communication skills.

Skills overview

Cambridge International AS & A Level Global Perspectives & Research develops learners' thinking skills of analysis, evaluation and synthesis through considering a range of global topics. Learners will develop skills of independent enquiry and learn about appropriate research methods and methodology.

Learners will be encouraged to develop research, reasoning and communication skills systematically, using an approach called the Critical Path. This approach helps them to interrogate information, explore different perspectives and communicate personal reflections.

Learners are encouraged to work both independently and collaboratively, with respect for and understanding of different cultures and perspectives.

This is a skills-based subject and schools can make their own selection of global topics to study. Learners can draw upon knowledge and understanding gained from studying other subjects. Learners will develop skills that are interdisciplinary and highly transferable to other subjects.



Cambridge Assessment International Education is an education organisation and politically neutral. The contents of this syllabus, examination papers and associated materials do not endorse any political view. We endeavour to treat all aspects of the exam process neutrally.

'Cambridge International AS & A Levels prepare students well for university because they've learnt to go into a subject in considerable depth. There's that ability to really understand the depth and richness and the detail of a subject. It's a wonderful preparation for what they are going to face at university.'

US Higher Education Advisory Council

Assessment overview

Component 1

Written Exam 1 hour 30 minutes

45 marks

Written exam consisting of three compulsory questions based on sources provided with the exam paper.

The source documents present perspectives on an issue of global significance.

Candidates analyse and evaluate arguments, interrogate evidence and compare perspectives.

Externally assessed

36% of the AS Level

18% of the A Level

Component 2

Essay

40 marks

Candidates research a global issue of their own choice from topics studied during the course, exploring different perspectives.

Candidates devise their own essay title and write an essay in continuous prose of 1750-2000 words.

Externally assessed

32% of the AS Level

16% of the A Level

Component 3

Team Project

40 marks

Candidates work in teams to identify a local problem that has global relevance. Each team member researches the problem from a distinct perspective and suggests a solution based on their research findings.

Each candidate prepares two pieces of work for individual submission. Candidates submit:

Presentation (30 marks)

Each candidate presents their individual research and proposed solution to the problem in a presentation. Team presentations are not permitted.

Reflective paper (10 marks)

Each candidate writes a paper that reflects on the effectiveness of their team's collaboration and on their own learning.

Externally assessed

32% of the AS Level

16% of the A Level

Component 4

Cambridge Research Report

85 marks

Candidates undertake independent research on a topic of their own choice. They devise and develop a research question and then conduct personal research to answer that question.

Candidates submit:

Research report (75 marks)

Each candidate writes a research report of up to 5000 words. The topic content and the style of writing should not be highly technical, it should be aimed at a non-specialist reader.

Research log (10 marks)

Each candidate records their progress in a research log.

Externally assessed

50% of the A Level

Information on availability is in the **Before you start** section.

There are three routes for Cambridge International AS & A Level Global Perspectives & Research:

	Route	Component 1	Component 2	Component 3	Component 4
1	**AS Level only** (Candidates take all AS components in the same exam series)	✓	✓	✓	
2	**A Level** (staged over two years) Year 1 AS Level*	✓	✓	✓	
	Year 2 Complete the A Level				✓
3	**A Level** (Candidates take all components in the same exam series)	✓	✓	✓	✓

* Candidates carry forward their AS Level result subject to the rules and time limits described in the *Cambridge Handbook*.

Candidates following an AS Level route are eligible for grades a–e. Candidates following an A Level route are eligible for grades A*–E.

Assessment objectives

The assessment objectives (AOs) are:

AO1 Research, analysis and evaluation

- identify and analyse arguments, evidence and perspectives
- synthesise and evaluate arguments, evidence and perspectives
- locate through research a range of appropriate sources and perspectives
- use research to support judgements about arguments and perspectives
- design and manage a personal research project using and evaluating appropriate research methods and methodology (A Level only)
- select and analyse appropriate concepts, arguments, perspectives and evidence from a range of source materials and use these in the personal research report (A Level only)

AO2 Reflection

- acknowledge different perspectives and evaluate their impact on the learner's own standpoint
- consider the extent and limits of the learning and research that has been undertaken
- reflect on and evaluate the effectiveness of collaboration with others (AS Level only)
- reflect on and justify the scope, nature and limitations of the learner's own research report (A Level only)

AO3 Communication

- produce structured, written arguments using appropriate terms and referencing where applicable
- produce a structured presentation using language appropriate for the audience (AS Level only)
- communicate information visually in order to engage an audience (AS Level only)

Weighting for assessment objectives

The approximate weightings allocated to each of the assessment objectives (AOs) are summarised below.

Assessment objectives as a percentage of each qualification

Assessment objective	Weighting in AS Level %	Weighting in A Level %
AO1 Research, analysis and evaluation	65	65
AO2 Reflection	15	20
AO3 Communication	20	15
Total	100	100

Assessment objectives as a percentage of each component

Assessment objective	Weighting in components %			
	Component 1	Component 2	Component 3	Component 4
AO1 Research, analysis and evaluation	89	63	40	65
AO2 Reflection	–	22	25	20
AO3 Communication	11	15	35	15
Total	100	100	100	100

3 Approaches to teaching and learning

This syllabus gives you the flexibility to design a course that will interest, challenge and engage your learners. Where appropriate you are responsible for selecting topics, resources and examples to support your learners' study. These should be appropriate for the learners' age, cultural background and learning context as well as complying with your school policies and local legal requirements.

Cambridge International AS Level Global Perspectives & Research is a skills-based syllabus which uses global issues as a context for study. Following this syllabus will equip students with the skills to be effective, active participants in a rapidly changing intellectual and technical environment. Importantly, this syllabus also prepares and encourages learners to work with confidence both independently and collaboratively, with respect for and understanding of different cultures.

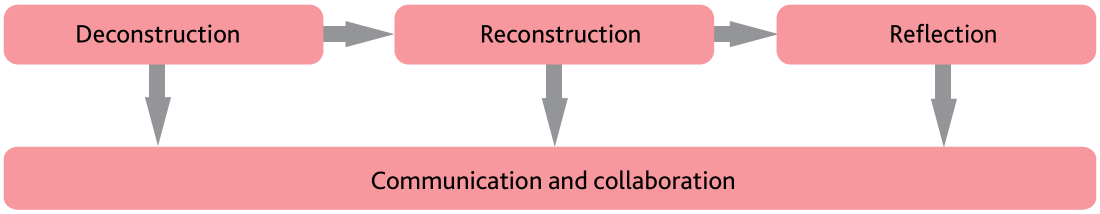
Cambridge International A Level Global Perspectives & Research encourages the development of independent enquiry and an understanding and use of appropriate research methods and methodology. When following this course, learners need to become fully engaged in a research process of their own. The course provides further development and practice of the higher-order thinking skills of analysis, evaluation and synthesis.

The Critical Path

To encourage learners to think critically, this syllabus presents an approach to analysing and evaluating arguments and perspectives called the Critical Path. The Critical Path is distinctive to Cambridge International AS and A Level Global Perspectives & Research and provides a central unifying concept linking all parts of the syllabus.

The Critical Path offers a systematic approach to teaching and learning where learners develop the ability to deconstruct and reconstruct arguments about global issues through personal research and interrogation of evidence. By reflecting on the implications of their research and the personal judgements it leads them to make, students learn to communicate their findings and ideas through a range of appropriate formats.

The Critical Path



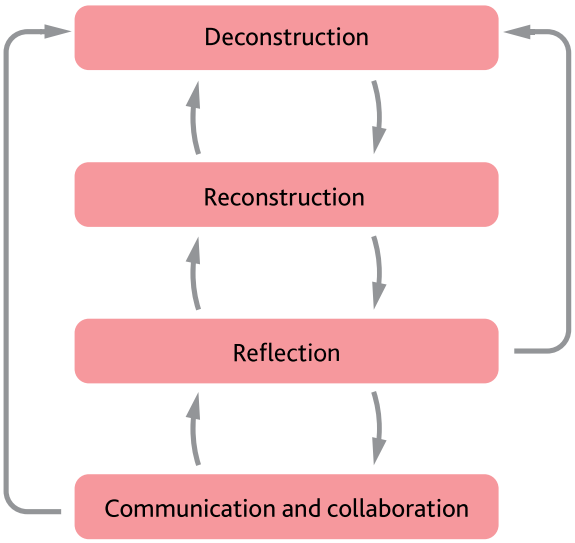
Visit the online Learning Area to find support for both learners and teachers: **https://learning.cambridgeinternational.org/**. Teachers can log into the area to access resources and course content. It also allows learners around the world to collaborate between schools, countries and cultures, helping to foster genuine global perspectives.

Developing skills using the Critical Path

The Critical Path is an approach to teaching and learning that provides a systematic way for learners to develop the skills of research, reasoning and communication. These valuable thinking and reasoning skills are useful for a range of subjects and can also be used in higher education and a wide range of careers.

As a teaching and learning tool, the Critical Path provides an effective approach to interrogating information, exploring different perspectives and communicating personal reflections. For students, the Critical Path is best seen as a sequence of repeated steps, which need to be practised.

The Critical Path as a learning process



To follow are examples of the sort of questions that teachers and learners might think about at each stage of the Critical Path.

Stages of the Critical Path	Example questions to promote thinking and learning
Deconstruction: conduct a detailed analysis and evaluation of a point of view	**Which different perspectives are represented?** Identify and compare different perspectives on an issue made up of arguments, claims, views, beliefs and evidence. **What are the key components of the argument or claim?** Differentiate between fact, argument, opinion, rant, speculation, prediction, explanation, hypothesis, account and belief. Identify conclusions, reasons (premises), assumptions (stated and unstated), assertions (and counter-assertions) and supporting evidence. **What are the implications of the conclusions, arguments, reasoning or claims?** Suggest the consequences of the conclusions, arguments, reasoning or claims. **What are the strengths and weaknesses of arguments, reasoning or claims?** Evaluate the strengths and weaknesses in the arguments, reasoning or claims. Assess the use of analogy and identify any errors in the reasoning. **How strong is the evidence?** Identify whether evidence gives strong or weak support to the conclusion or claim. Consider the reliability of the evidence and suggest other evidence required to substantiate or refute claims or counterclaims.

Stages of the Critical Path	Example questions to promote thinking and learning
Reconstruction: carry out research, identify, group together and evaluate evidence and sources for and against competing points of view	**What evidence is there to support different perspectives?** Use research to identify the range of perspectives on the issue and the support there is for each perspective. **What sources are used to support different perspectives and how acceptable are they?** Identify, synthesise and evaluate a range of sources. Consider the credibility and relevance of each source in providing arguments and evidence for each perspective. **Does the evidence lead to a single conclusion?** Research and evaluate alternative arguments and perspectives. Make a reasoned and balanced judgement based on evidence. **What is the context of the arguments?** Explain the context in which the arguments have been made.
Reflection: explore the impact of research on personal perspectives	**What was your personal viewpoint before carrying out research?** Reflect on initial personal perspectives before any research or thinking has been done. **How does your own viewpoint relate to the perspectives identified in the research?** Evaluate personal viewpoints against alternative perspectives on issues. **What impact has the research had on any views you had before?** Evaluate the impact of alternative perspectives on your personal viewpoint. **Why has the research had an effect on your previous views?** Justify the reasons why personal perspectives have changed as a result of research. **What additional research might be useful?** Identify and justify possible future research directions.
Communication and collaboration: communicate views, information and research effectively and convincingly; work with others as part of a group	**How can I work with others to identify problems and devise effective solutions?** Find ways of working together and maximising each person's potential in pursuit of a common goal. **How effective was our work together?** Identify the strengths and weaknesses of your teamwork. Consider what made the collaboration effective or ineffective in relation to the team's goal. Make suggestions for improving teamwork in the future. **How can arguments be made effectively and persuasively?** Communicate your reasoning in a well-structured, clear and effective manner using appropriate written or spoken conventions. **How should research findings be communicated to a non-specialist audience?** Define and use appropriate terms consistently. Cite and reference sources in an appropriate and recognisable way. **What is the most appropriate way to present to an audience?** Select and organise material for a listening audience. Choose the most appropriate audio or visual media to support the arguments being made. Prepare and use a range of effective presentational methods to reinforce arguments and ideas.

The skills of the Critical Path can be mapped to each component, as shown below:

Component	Skill				
	Deconstruction	Reconstruction	Reflection	Communication	Collaboration
1 Written exam	✓	✓		✓	
2 Essay	✓	✓	✓	✓	
3 Team Project	✓	✓	✓	✓	✓
4 Cambridge Research Report	✓	✓	✓	✓	

Global topics, themes, issues and perspectives (AS Level)

The syllabus includes a broad range of global topics and themes which together provide meaningful and stimulating contexts for skills development. By engaging with these topics and themes, learners can begin to develop the skills necessary to become active global participants – with a capacity and disposition for understanding and acting on global matters.

Learners will practise the Critical Path approach by identifying and studying global issues arising from at least three topics from the list below.

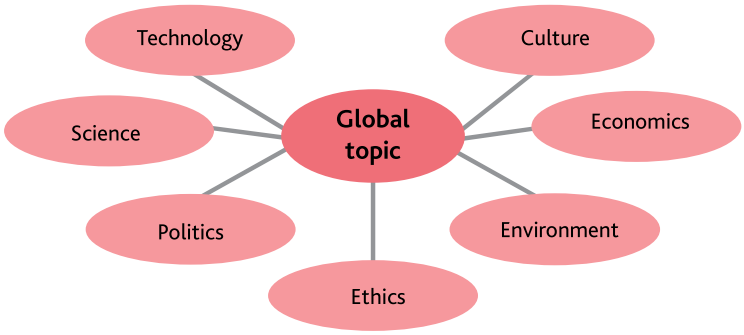
Global topics

Animal rights
Arts in an international context
Changing identities
Climate change
Crime
Cultural heritage
Demographic changes
Distribution of wealth
Economics of food
Endangered cultures
Energy
Environmental priorities
Ethical foreign policies
Ethics of food
Globalisation
Global inequality
Health issues
Human rights
Impact of technology
Industrial pollution
International aid
International law
Media and communication
Medical ethics and priorities
Migration and work
Political power and resistance
Quality of life
Scientific innovation
Social change and development
Social inequality
Sport in an international context
Sustainable futures
Tourism
Transport
Urbanisation

Global topics, themes, issues and perspectives (AS Level) continued

Themes

Learners research global topics through relevant themes. The number of themes will vary from topic to topic. Themes are not the same as perspectives. For details see Key terms below.



Global issues and perspectives

Exploring a global topic through different themes will reveal a range of global issues, which in turn will help learners to identify different perspectives.

Example 1

Consider the topic 'Sport in an international context' through the themes of economics, politics, culture and ethics. Global issues emerge, such as who should be responsible for funding events such as the Olympics? Different perspectives could emerge from this issue, for example:

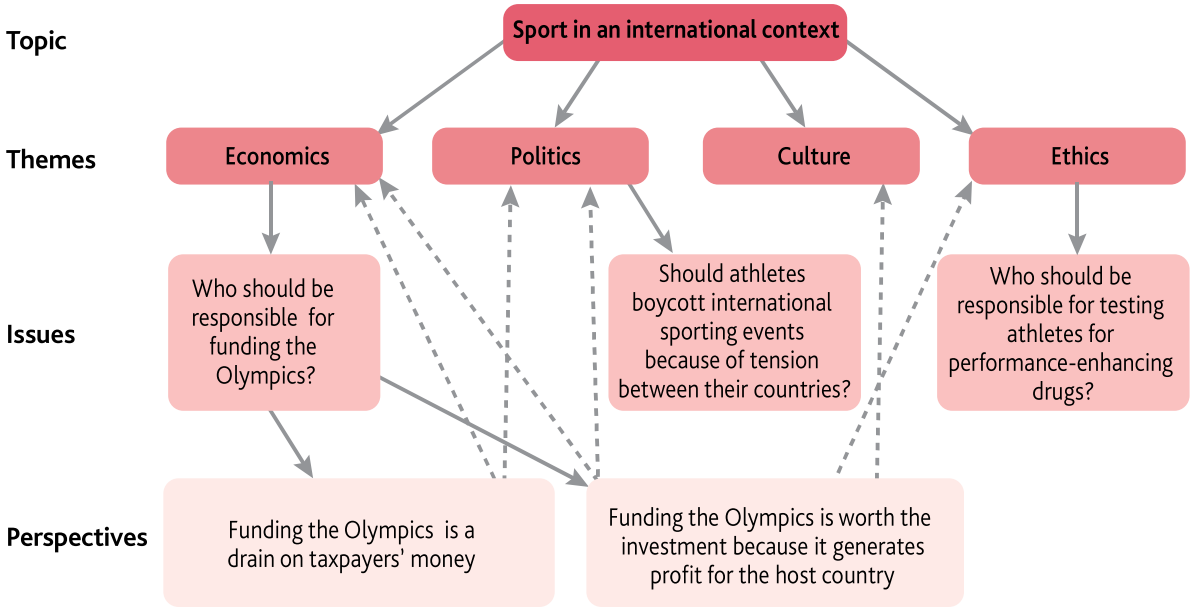
Perspective 1: Funding Olympic events is a drain on taxpayers' money. This perspective may be based on different arguments about the value of the Olympics, the needs of the taxpayer, the possible economic benefits, and the political popularity or unpopularity of spending public money. Behind this perspective may be assumptions and beliefs about the importance of international sport relative to the costs of the Olympics.

This perspective draws on the themes of economics and politics.

Perspective 2: Funding Olympic venues is worth the investment and a good use of taxpayers' money because of the profit the venues produce after the event. The key word in this perspective is 'worth' and the assumption that the Olympics is worth the investment for the resulting economic and financial benefits and for the political prestige it brings to the host country. Behind this perspective there is a general outlook on the funding of the Olympics which contains different assumptions, views, justifications and beliefs to those associated with Perspective 1.

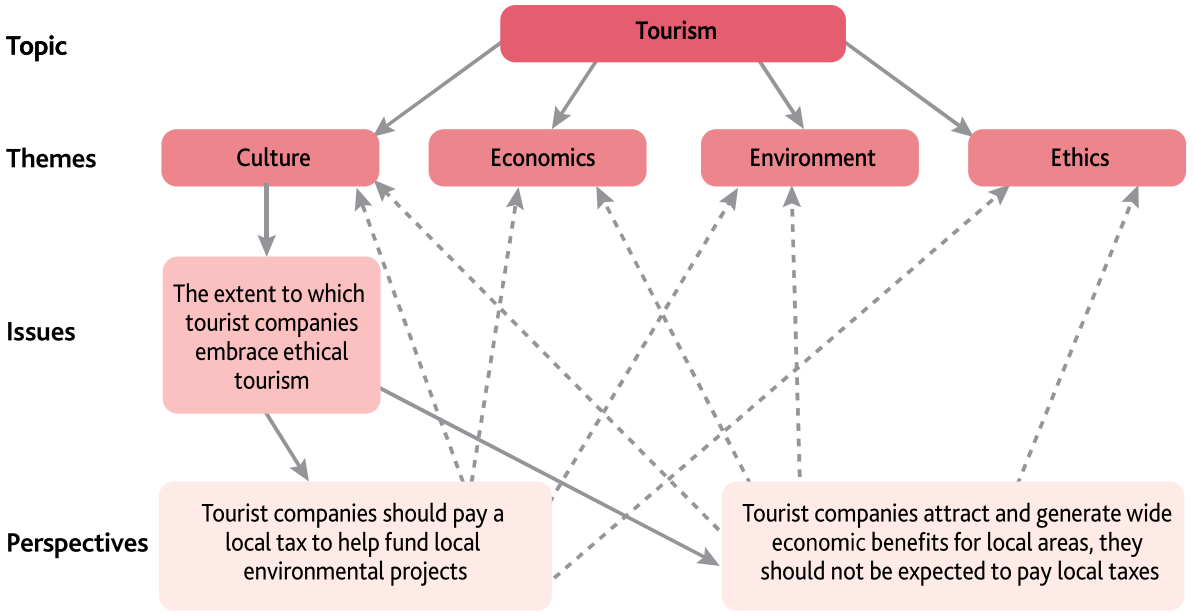
This perspective draws on the themes of economics, politics, culture and ethics.

Global topics, themes, issues and perspectives (AS Level) continued



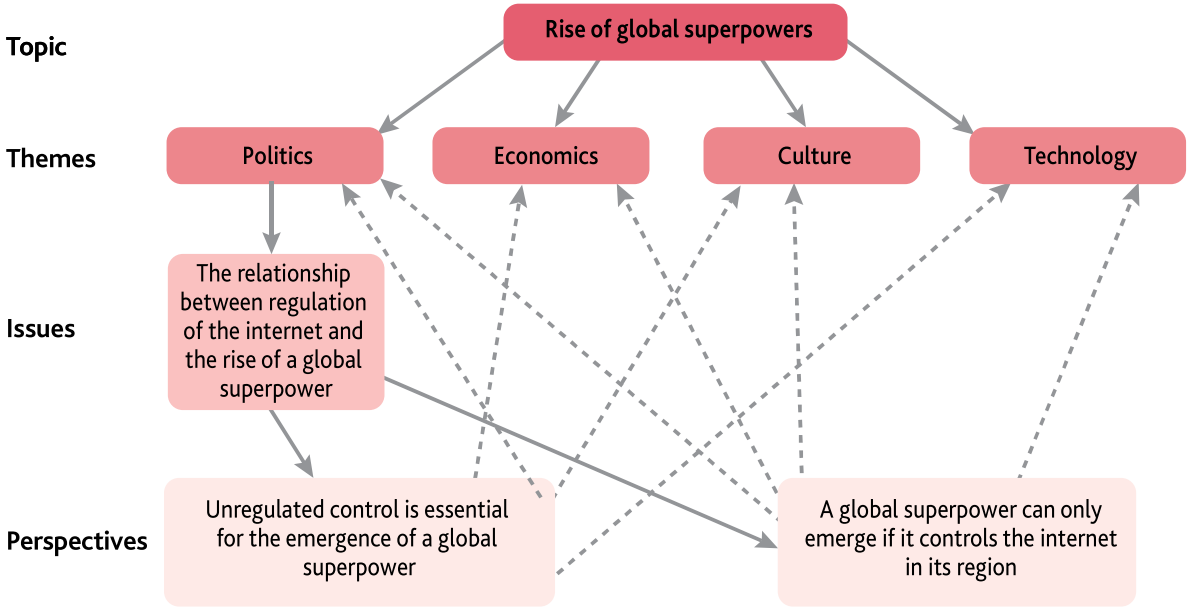
To follow are two other examples of how themes, issues and perspectives might be connected.

Example 2



Global topics, themes, issues and perspectives (AS Level) continued

Example 3



Key terms

Global topics are broad potential areas for study. Learners can use topics as starting points for identifying issues.

Themes are approaches to topics or issues, for example culture, economics, the environment, ethics, politics, science and technology. A specific thematic approach to an issue can help to identify a perspective on that issue.

Issues are specific, more narrowly defined areas within a topic that are suitable as subjects for an essay or other piece of work. An issue often has global interest or relevance and can combine specific areas of different topics or themes.

A **perspective** is a coherent world view which is a response to an issue. A perspective is made up of argument, evidence and assumptions and may be influenced by a particular context.

Arguments consist of one or more reasons that lead to a conclusion. These reasons may be supported by **evidence**: facts or other data which can be **primary** (first-hand information) or **secondary** (which may be based on primary evidence but are not from the situation itself). Learners will make judgements about arguments they find and create arguments of their own.

Assumptions are reasons which are not stated but are still part of an argument.

The **provenance** of a source includes its author and where or when it was written.

4 Details of the assessment

Component 1 – Written Exam

Written paper, 1 hour 30 minutes, 45 marks

This component is an externally set assessment, marked by Cambridge International.

Component 1 contains three questions based on two source documents provided with the exam paper. The source documents may present different perspectives on an issue of global significance.

Candidates answer **all** the questions.

Question 1 (5 marks) is a structured question based on two source documents. Candidates are required to read both sources and answer short questions that require candidates to demonstrate AO1 skills.

Question 2 (15 marks) requires a longer response based on one of the source documents. Candidates are required to focus on the evidence in the document and demonstrate AO1 skills.

Question 3 (25 marks) requires a longer, essay response based on the two source documents. Candidates are required to focus on the arguments and perspectives given in the documents and provide a reasoned judgement, demonstrating AO1 and AO3 skills.

Candidates are assessed on their thinking and reasoning skills focused on analysing and evaluating arguments, interrogating evidence and contexts and comparing perspectives centred on global issues. Candidates are not assessed on their knowledge and understanding of the specific issues represented in the source material.

In carrying out a critical and comparative analysis of the source material, candidates are assessed on their ability to:

- identify evidence, analyse its strengths and weaknesses and evaluate the evidence (AO1)
- identify and compare key components of arguments (AO1)
- analyse and compare perspectives (AO1)
- evaluate arguments and make judgements about arguments and perspectives (AO1)
- communicate clearly and logically (AO3).

Written Exam: the role of the teacher

The Written Exam is a skills-based exam which does not require candidates to have been taught specific content or to have prior knowledge of the specific global topic. The global issue in the source documents in the exam paper provides a context for the assessment of the skills associated with AO1: Research, analysis and evaluation.

Teachers therefore need to provide opportunities for candidates to practise and develop these skills during the course. There should be regular opportunities to discuss and debate global issues related to the topics, so that candidates learn to consider a variety of different perspectives.

Teachers should prepare candidates for the types of questions they are likely to experience in the Written Exam by using specimen and past papers and their related mark schemes. These can be obtained from the Cambridge International websites **www.cambridgeinternational.org** and **www.cambridgeinternational.org/support**

There is also an online AS course available on our online Learning Area
https://learning.cambridgeinternational.org/

Component 2 – Essay

40 marks, externally marked

Candidates write an essay of 1750–2000 words on a global issue of their own choice from topics studied during the course.

Candidates must choose an essay title that is a single question. The choice of essay question must provide opportunities to develop globally contrasting perspectives.

In their research, candidates should identify and explore the context and basis of arguments that respond to the question from different global perspectives. They should identify globally contrasting perspectives, understand the arguments, reasoning or claims upon which these perspectives are based and offer a critical view of them. Sources selected should offer firmly supported judgements or conclusions. Evaluation of sources and perspectives should form a substantial element of candidates' essays. Candidates should reach a personal, supported view on the question.

In the essay, candidates should demonstrate AO1, AO2 and AO3 skills. They will be assessed on their ability to:

- analyse their chosen question (AO1)
- synthesise arguments to build contrasting perspectives (AO1)
- select and refer to a range of sources (AO1)
- assess and justify the appropriateness of the sources selected (AO1)
- compare and evaluate contrasting perspectives (AO1)
- reflect on the impact of alternative perspectives on their viewpoint (AO2)
- suggest further relevant research (AO2)
- write a clear, structured essay using effective referencing (AO3).

The essay must be written in continuous prose and include a list of sources used. Quotations must be fully referenced. The essay must be 1750–2000 words and an accurate word count must be clearly stated on each essay. The word count excludes the title, references and citations. Work beyond the 2000 word maximum will not be marked. The essay must be submitted electronically.

Essay: the role of the teacher

A class may work together to carry out background research on a global issue, but each candidate must devise their own question. Teachers should support candidates in formulating appropriate questions.

Candidates should be given sufficient time to plan and prepare their research. During this preparation, teachers should support each candidate to:

- understand the nature of the task
- identify a suitable issue to research
- formulate an appropriate global question
- develop a suitable approach to the research
- develop organisational skills
- cite and reference their sources
- focus on reconstruction and reflection
- write effectively and concisely to stay between 1750 and 2000 words
- include an accurate word count.

continued

Teachers should support candidates in formulating an appropriate global question. The question should:

- be phrased as a question, not as a statement or generic topic area to discuss
- allow for the analysis of at least two globally contrasting perspectives. Questions that focus on an exclusively local or national issue or perspective are unlikely to be appropriate
- enable candidates to make well-supported judgements
- be about an issue which genuinely interests the candidate.

Further support in formulating appropriate and effective global questions can be found in the online AS course available on our online Learning Area **https://learning.cambridgeinternational.org/**

Supervising coursework

A general discussion on the progress of coursework is a natural part of the teacher–candidate relationship, as it is for other parts of the course. If plans and first drafts are completed under teacher supervision, the teacher can be sure of the authenticity of the final coursework. Candidates can draft and redraft work, but teachers should only give brief summative comments on progress during this drafting phase.

Coursework must be a candidate's own, unaided work. Teachers can support candidates by reviewing their work before it is handed in for final assessment. You can do this orally or through written feedback. Teachers' advice should be kept at a general level so that the candidate leads the discussion and makes the suggestions for any amendments. Teachers must not give detailed advice to individual candidates or groups of candidates on how their work can be improved to meet the assessment criteria. You should not correct or edit draft coursework.

For further information about supervising coursework, see the *Cambridge Handbook* for the relevant year of assessment at **www.cambridgeinternational.org/eoguide**

Authenticity and academic honesty

It is the centre's responsibility to make sure all assessed work is the candidate's original work. Candidates must not submit someone else's work as their own, or use material produced by someone else without citing and referencing it properly. Teachers should make candidates aware of the academic conventions governing quotation and reference to the work of others, and teach candidates how to use them.

A candidate taking someone else's work or ideas and passing them off as his or her own is an example of plagiarism. Cambridge International use plagiarism detection software packages. It is the teacher's responsibility to prevent plagiarism from happening and to detect it if it does happen. For more information, search for 'Preventing plagiarism – guidance for teachers' on our website at **www.cambridgeinternational.org**

At the time of submission, the candidate must sign a statement of originality confirming that they are submitting their own work. The teacher countersigns it to confirm that they believe it is the candidate's work.

Submitting candidates' work

The essay is externally marked by Cambridge International. Candidates' work must be submitted electronically. The deadlines and methods for submission are in the *Administrative Guide*. This is available from the Exams Officers' Guide section of our website: **www.cambridgeinternational.org/eoguide**

Component 3 – Team Project

Presentation and reflective paper, 40 marks, externally marked

Candidates must work in teams of two to five members to identify a local problem that has global relevance. Each team works together to identify the problem to research. The team must outline their local problem in a single statement that allows the team members to address contrasting perspectives on the problem. The scope of the research should be sufficiently broad to enable teams to explore the problem from local and global perspectives. Teachers should support teams in formulating an appropriate statement.

Candidates allocate areas for each team member to research. Each team member is expected to argue from their distinct perspective for an effective and workable solution to the problem.

Each candidate is required to give a presentation about their research and preferred solution. They are also required to write a reflective paper in which they reflect on the effectiveness of the collaboration undertaken by the team and on their individual learning. Their learning may be about the problem itself, the research skills they have developed, and/or presentation skills.

Presentation

30 marks

Each candidate will give a presentation about their research and preferred solution (10 minutes maximum). The presentation may be either:

- a live recording of the candidate

or

- a presentation with a recorded voiceover by the candidate

Candidates should demonstrate AO1 and AO3 skills.

Live recording

It is important that the presentation is recorded in one session and in an area that is quiet with no background noise to ensure what the candidate is saying can be heard.

The presentation should be supported by audio and/or visual materials appropriate to the live presentation and delivered to an audience. The size of the audience can be determined by the centre but must include at least three people, one of whom must be the class teacher.

Presentation with recorded voiceover

For a presentation with a recorded voiceover, candidates should create a presentation using appropriate presentational software and attach an audio recording of themselves speaking to their presentation. It is important that the recording is carried out in an area that is quiet with no background noise to ensure what the candidate is saying can be heard.

There does not need to be a live audience. Candidates should use language appropriate for the presentation and sustain the language throughout. The presentation should contain appropriate audio and visual elements.

A presentation (10 minutes maximum) must be submitted for each candidate. Team presentations must **not** be submitted for assessment.

Candidates will be assessed on how their presentation displays the following skills:

- individual analysis of the problem identified by the team (AO1)
- range of research undertaken (AO1)
- evaluation of sources (AO1)
- justification for their individual solution (AO1)
- production of a well-argued, well-organised argument (AO3)
- use of visual information (AO3)
- use of language to address the audience. (AO3)

The presentation should:

- be engaging to a non-specialist audience
- include audio and visual elements in an effective way
- use appropriate terms and cite references clearly and accurately.

The presentations must be submitted to Cambridge International along with the audio and/or visual materials used and a verbatim transcript of the presentation. The running time for the presentation must not exceed 10 minutes. Work beyond the maximum running time will not be included in the assessment. Teachers must ensure that the quality of any recording will permit accurate marking of the work.

Reflective paper

10 marks

Each candidate will write a reflective paper (maximum 800 words) focusing on how effectively the team worked together, what could be improved, and any changes to their personal views shaped by the collaborative experience. Candidates should demonstrate AO2 skills.

Candidates will be assessed on their:

- reflection on the effectiveness of the team collaboration (AO2)
- reflection on the learning (AO2).

For each candidate, submit the following pieces of work to Cambridge International:

1 Recording of the live presentation OR presentation with recorded voiceover
2 Audio and/or visual materials to support a live presentation
3 A transcript of the presentation
4 The reflective paper.

A statement of originality must be included for each candidate.

Team Project: the role of the teacher

The teacher should take an active role in creating teams. The maximum team size is five, the minimum two. Teams of three or four candidates work together well and often find it easier to agree on what problem to research.

Teachers should support each candidate and team in:

- understanding the nature of the task
- formulating an appropriate research topic
- developing a means through which candidates can research different perspectives
- developing organisational skills
- citing and referencing their sources
- focusing on reflection and communication
- developing clear oral arguments
- working collaboratively towards the same shared outcome.

Teachers should note that the use of audio and/or visual materials does not need to be extensive but rather should be fit for purpose and reflective of working in the twenty-first century.

The presentation and reflective paper must be each candidate's own, unaided work. Once candidates start researching and producing their presentations, they may seek assistance from the teacher, but advice should be kept at a general level so that the candidates lead the discussions and make the suggestions for any amendments. Teachers must not give detailed advice to individual candidates or groups of candidates on how their work can be improved to meet the assessment criteria.

There is also an online AS Level course available on our online Learning Area **https://learning.cambridgeinternational.org/**

Teachers must not:

- offer or provide detailed subject guidance to candidates or teams
- undertake any research on behalf of candidates
- prepare or write any subject-specific notes or drafts for candidates
- correct any part of a candidate's notes used for their presentation
- prepare any part of a candidate's presentation
- produce any part of the transcript to accompany a candidate's oral commentary
- suggest amendments to, or make comments on, any part of a candidate's presentation or reflective paper.

For further information about supervising coursework, see the *Cambridge Handbook* for the relevant year of assessment at **www.cambridgeinternational.org/eoguide**

Authenticity and academic honesty

It is the centre's responsibility to make sure all assessed work is the candidate's original work. Candidates must not submit someone else's work as their own, or use material produced by someone else without citing and referencing it properly. Teachers should make candidates aware of the academic conventions governing quotation and reference to the work of others, and teach candidates how to use them.

A candidate taking someone else's work or ideas and passing them off as his or her own is an example of plagiarism. Cambridge International use plagiarism detection software packages. It is the teacher's responsibility to prevent plagiarism from happening and to detect it if it does happen. For more information, search for 'Preventing plagiarism – guidance for teachers' on our website at **www.cambridgeinternational.org**

At the time of submission, the candidate must sign a statement of originality confirming that they are submitting their own work. The teacher countersigns it to confirm that they believe it is the candidate's work.

Submitting candidates' work

All materials for Component 3 must be submitted electronically. The deadlines, details of acceptable formats for presentations, and methods for submission are in the *Administrative Guide*. This is available from the Exams Officers' Guide section of our website: **www.cambridgeinternational.org/eoguide**

Component 4 – Cambridge Research Report

Research report, 85 marks, externally marked

For the Cambridge Research Report, candidates complete a research project on a topic and question of their own choice. The project comprises a report of up to 5000 words, supported by a research log.

The report and log are externally marked by Cambridge International.

Research report – 75 marks
Research log – 10 marks

The report must be based around a single question that lends itself to in-depth research. The report should be written for a non-specialist audience.

Throughout their research, candidates must keep a research log and submit it with their report. The log must be a **separate** document to the report. In their log, candidates should record information relating to the research process and reflect on their research findings and decisions.

For the Cambridge Research Report, candidates should demonstrate AO1, AO2 and AO3 skills. Candidates will be assessed on their ability to:

- use a research log to record, plan and reflect on research (AO1, AO2)
- reflect on research findings and decisions (AO2)
- analyse their research question (AO1)
- use appropriate research methods (AO1)
- select and analyse relevant concepts (AO1)
- use and assess sources to support arguments and perspectives (AO1)
- build and compare contrasting perspectives (AO1)
- reflect on how alternative perspectives have influenced their argument (AO2)
- make judgements which are supported by evidence (AO1)
- reflect on their conclusions (AO2)
- structure their report effectively, use accurate terminology and use complete and appropriate citation and referencing (AO3).

The report must be written in continuous prose and must not exceed 5000 words. An accurate word count must be clearly stated. The title and bibliographical references are **not** included in the word count. Work beyond the 5000 word maximum will not be marked.

The report must include a bibliography and full bibliographical references must be given for any quotations. The format and referencing conventions used should be appropriate to the subject discipline/s.

Each candidate must also complete a research proposal form, and this must be reviewed internally. The research proposal is not externally marked by Cambridge International, but it must be submitted with the materials sent for assessment. For further guidance, see the section 'Initial preparation and research proposal' below.

Initial preparation and research proposal

Candidates are advised to choose a topic that engages them strongly and is of real importance to them. Candidates should develop initial ideas for their research and teachers must support candidates in developing a suitable research question. Each candidate must write a research proposal and discuss this with their teacher. The research proposal should outline:

- the research question
- the key concepts which are relevant to the question
- an outline of the debate to be addressed
- examples of sources which will be used.

The teacher must review the research proposal to confirm whether the concepts and debate are relevant and that the research question chosen gives the candidate scope to meet the assessment criteria.

The title of the report must take the form of a question. Formulating a good research question takes time and careful consideration. The report should explain how and why the question was developed. For example, why is the question worth asking, and how did it develop during the research process?

Candidates should also consider the key concepts associated with their research question and area of research. The key concepts are the terms or ideas which are relevant to the topic they have chosen. For example, for a project on the representation of women in poetry, key concepts might be gender and feminism. Or, for a project which investigates different explanations for the movement of fluids in science, key concepts might be the conservation of energy and Brownian motion.

Candidates must discuss their research proposal with their teacher, to ensure that their research question, concepts, initial thoughts on how they intend to argue for or against the question, and sources are appropriate. Teachers should support candidates in developing their ideas and approve the research proposal form.

It is important that candidates spend sufficient time on this preparatory stage.

Download the research proposal form from the samples database at **www.cambridgeinternational.org/samples**. For each candidate, a completed research proposal form, with comments from the teacher, must be submitted to Cambridge International along with the materials for assessment.

For further guidance on the initial preparation and the research proposal, see the *Teacher Guide* or go to our School Support Hub **www.cambridgeinternational.org/support**

Cambridge Research Report: the role of the teacher

The teacher's role is to ensure an understanding of the task, monitor progress, and respond to requests for advice on research and writing in general, but not to guide specific content.

The teacher will need to help each candidate to decide on the subject and scale of their research. The teacher must review the research proposal to confirm the topic is suitable and provides enough opportunities to meet the assessment criteria but is not too large, nor too complex. In the initial stage when topics are being selected, teachers might arrange workshops for candidates to discuss subject specific issues and approaches. As topics are refined and questions developed, workshops might also be used to share ideas.

The teacher is responsible for formally approving each candidate's research proposal. Teachers should do this before the candidate starts work on their research. Teachers should be satisfied that the research does not raise safety issues for the candidates. Information on safeguarding is available in the *Our standards* section of our public website. We recommend that teachers read the booklet *Safeguarding: The Protection of Children and Vulnerable Adults*.

Throughout the research process the teacher should support each candidate to:

- identify an appropriate topic and develop a suitable research question
- consider alternative perspectives on the question
- consider whether enough evidence exists in relation to the topic and question
- select research methods that are appropriate for the project
- consider research ethics and conventions in relation to specific research questions
- consider the timescale and overall planning
- keep a research log.

In the production of the report, teachers should support candidates to:

- use appropriate terms, referencing and citation techniques
- consider critically the research methods and sources used
- communicate effectively and clearly in an extended piece of writing.

Research must be the candidate's own unaided work and findings must be the result of personal reflection and judgement. The work may be supported by ongoing workshops and classes. Candidates may also consult with a subject-specific teacher if they are carrying out research into a specialist topic. However, the report needs to address a non-specialist audience. Teachers should monitor candidates' progress by discussion of their research log. It is a teacher's responsibility to verify that the work is that of the candidate working alone.

Further support can be found in our online Learning Area **https://learning.cambridgeinternational.org/**

Teachers/subject-specific consultants must **not**:

- teach specific topics or offer their own information and views on topics
- undertake any research for a candidate
- correct any part of a candidate's notes or drafts
- prepare any part of a candidate's report.

Evidence

The research report must be evidence-based. Evidence is likely to be primary evidence and/or secondary evidence. Primary evidence is first-hand information and can come from a range of sources, such as historical documents, literary texts, artefacts and data gathered from scientific observation, as well as interviews and surveys. Secondary evidence includes material such as the arguments and opinions of specialists which reflect on or synthesise primary evidence. Candidates should be aware of and explore the strengths and potential weaknesses of all types of evidence.

Research methods and methodology

Candidates should select research methods that are appropriate for their chosen topic. The research can be based on primary and/or secondary evidence, depending on the subject matter and the approach. The types of research methods that might be used are:

- reviewing the secondary literature in the field
- close analysis of texts
- producing evidence through other qualitative research methods (e.g. ethnography, interviews, focus groups)
- analysis and evaluation of statistical or other numerical data
- producing evidence through other quantitative research methods (e.g. surveys, experiments)
- a mixture of the methods above.

The study of the reasons why particular sets of methods are appropriate for specific academic subject areas is known as research methodology. Candidates are expected to engage with the methodology underlying their choice of research methods, and consider the impact of their choice on their report.

Candidates should be taught:

- research and organisational skills
- a broad understanding of research methods and research methodology
- how to select and use appropriate concepts for their chosen research topic
- appropriate ways of citing and referencing sources
- the meaning and significance of academic honesty and plagiarism.

In their research report, candidates must explain their choice and use of appropriate research methods, and consider the methodology which has informed this. Candidates should explain how they carried out the research.

Research log

Candidates must use a research log throughout the research process to record information, plan actions and reflect on research findings and decisions. Decisions could include the wording of their research question, their choice of methods, and judgements made during the research based on their findings. Candidates do not need to record all their actions and thinking in their log. The log could contain reminders of things to check, ongoing evaluation of the research, and reflections on how their thinking or their research question may have changed as a result of feedback from the teacher.

The log must be submitted for assessment and must be a separate document to the report. It can be written in note form or a mixture of notes and continuous prose. The log is not included in the 5000 word limit of the report but it should not be seen as a way to extend that word limit.

For further guidance on the log, including length and format, see the *Teacher Guide*.

Perspectives

A candidate's research question should lead to the discussion of different perspectives. A perspective is a coherent world view which is a response to an issue. A perspective is made up of argument, evidence and assumptions, and may be influenced by a particular context. It should be clear from the research question that it will be possible to analyse and evaluate different perspectives.

For example, a candidate may want to choose industrialisation as their research topic. There are different opinions about industrialisation. Some argue in favour of industrialisation because industrial production can manufacture goods more efficiently. However, others argue against it because of the pollution it generates. Each of these views can be supported by different kinds of evidence. The argument for industrialisation based on its efficiency might be backed up by quantitative evidence of rates of production and profitability. The arguments against industrialisation because of the pollution it causes, might be supported by observational evidence of its impact on the natural environment. Each of these views also make different assumptions: unstated reasons which lead them to value different kinds of evidence and come to different conclusions. In each case, the combination of the arguments, evidence and assumptions makes up a distinctive perspective. A judgement between them can, however, be reached by the careful and sympathetic evaluation of the differing yet well-established views.

The research question should lead directly to an assessment of the perspectives. It would not be suitable for a research question to be simply 'Industrialisation' because that is a not a question. The title 'Has industrialisation been environmentally damaging?' is a question, but it would not be suitable because it suggests a one-sided, preconceived view and does not lead directly to a debate. However, an appropriate question and report title would be 'Is industrialisation a good thing?', because this question could lead to establishing and evaluating different perspectives.

For further guidance, see the *Teacher Guide*.

Structuring and presenting the Cambridge Research Report

The report should contain an introduction, main body and conclusion. It may include sub-headings and must include references. The report needs to be organised so that the argument is well communicated and easy to follow.

Candidates must acknowledge where specific ideas and information come from. They should use an appropriate referencing and citation system related to the academic discipline in which they are working. Many reports will adopt the Harvard, Chicago or APA referencing systems. Whatever referencing system candidates choose, they must use it consistently.

Authenticity and academic honesty

It is the centre's responsibility to make sure that all assessed work is the candidate's original work. If plans and first drafts are completed under teacher supervision, teachers can be sure of the authenticity of the final report. Teachers should not correct or edit draft coursework. Candidates can draft and redraft work, but teachers should only give brief summative comments on progress during this drafting phase. A general discussion on the progress of the report is a natural part of the teacher–candidate relationship, as it is for other parts of the course.

Candidates must not submit someone else's work as their own, or use material produced by someone else without citing and referencing it properly. Teachers should make candidates aware of the academic conventions governing quotation and reference to the work of others and teach candidates how to use them.

A candidate taking someone else's work or ideas and passing them off as his or her own is an example of plagiarism. Cambridge International use plagiarism detection software packages. It is the teacher's responsibility to prevent plagiarism from happening in the first place, and to detect it if it does happen. For more information, search for 'Preventing plagiarism – guidance for teachers' on our website at **www.cambridgeinternational.org**

At the time of submission, the candidate must sign a statement of originality confirming that they are submitting their own work. The teacher countersigns it to confirm that they believe it is the candidate's work.

Submitting candidates' work

All candidates' research reports and research logs are marked by Cambridge International. All work must be submitted electronically.

The deadlines and methods for submission are given in the *Administrative Guide*. This is available from the Exams Officers' Guide section of our website: **www.cambridgeinternational.org/eoguide**

For each candidate, submit the following pieces of work to Cambridge International:

1 Cambridge Research Report
2 Research log
3 Research proposal form.

Command words

Command words and their meanings help candidates know what is expected from them in the exam. The table below includes command words used in the assessment for this syllabus. The use of the command word will relate to the subject context.

Command word	What it means
Assess	make an informed judgement
Compare	identify/comment on similarities and/or differences
Contrast	identify/comment on differences
Demonstrate	show how or give an example
Develop	take forward to a more advanced stage or build upon given information
Evaluate	judge or calculate the quality, importance, amount, or value of something
Explain	set out purposes or reasons / make the relationships between things evident / provide why and/or how and support with relevant evidence
Identify	name/select/recognise
Justify	support a case with evidence/argument

Phrases such as 'To what extent …?' and 'Make an overall judgement' may also be seen in the assessment for this syllabus.

5 What else you need to know

This section is an overview of other information you need to know about this syllabus. It will help to share the administrative information with your exams officer so they know when you will need their support. Find more information about our administrative processes at **www.cambridgeinternational.org/eoguide**

Before you start

Previous study

We recommend that learners starting this course should have completed a course in English equivalent to Cambridge IGCSE™ or Cambridge O Level First Language English.

Guided learning hours

We design Cambridge International AS & A Level syllabuses based on learners having about 180 guided learning hours for each Cambridge International AS Level and about 360 guided learning hours for a Cambridge International A Level. The number of hours a learner needs to achieve the qualification may vary according to local practice and their previous experience of the subject.

Availability and timetables

All Cambridge schools are allocated to one of six administrative zones. Each zone has a specific timetable.

You can view the timetable for your administrative zone at **www.cambridgeinternational.org/timetables**

You can enter candidates in the June and November exam series. If your school is in India, you can also enter your candidates in the March exam series.

Check you are using the syllabus for the year the candidate is taking the exam.

Private candidates cannot enter for this syllabus. For more information, please refer to the *Cambridge Guide to Making Entries*.

Combining with other syllabuses

Candidates can take this syllabus alongside other Cambridge International syllabuses in a single exam series. The only exceptions are:

- Cambridge International Project Qualification 9980
- Syllabuses containing Global Perspectives within the syllabus title at the same level

Group awards: Cambridge AICE

Cambridge AICE (Advanced International Certificate of Education) is a group award for Cambridge International AS & A Level. It allows schools to offer a broad and balanced curriculum by recognising the achievements of learners who pass exams in a range of different subjects.

Learn more about Cambridge AICE at **www.cambridgeinternational.org/aice**

Making entries

Exams officers are responsible for submitting entries to Cambridge International. We encourage them to work closely with you to make sure they enter the right number of candidates for the right combination of syllabus components. Entry option codes and instructions for submitting entries are in the *Cambridge Guide to Making Entries*. Your exams officer has a copy of this guide.

Exam administration

To keep our exams secure, we produce question papers for different areas of the world, known as administrative zones. We allocate all Cambridge schools to one administrative zone determined by their location. Each zone has a specific timetable. Some of our syllabuses offer candidates different assessment options. An entry option code is used to identify the components the candidate will take relevant to the administrative zone and the available assessment options.

Support for exams officers

We know how important exams officers are to the successful running of exams. We provide them with the support they need to make your entries on time. Your exams officer will find this support, and guidance for all other phases of the Cambridge Exams Cycle, at **www.cambridgeinternational.org/eoguide**

Retakes and carry forward

Candidates can retake Cambridge International AS Level and Cambridge International A Level as many times as they want to. Information on retake entries is at **www.cambridgeinternational.org/entries**. To confirm what entry options are available for this syllabus, refer to the *Cambridge Guide to Making Entries* for the relevant series.

Candidates can carry forward the result of their Cambridge International AS Level assessment from one series to complete the Cambridge International A Level in a following series, subject to the rules and time limits described in the *Cambridge Handbook*.

Regulations for carrying forward entries for staged assessment (Cambridge International AS & A Level) can be found in the *Cambridge Handbook* for the relevant year of assessment at **www.cambridgeinternational.org/eoguide**

Marks achieved in Component 3, Team Project, can be carried forward on their own to future series, subject to the requirements set out in the *Cambridge Handbook*. This can be done by making entries for either of the following options:

- AS Level only awarding: the AS Level entry option, where components 1 and 2 are taken and the marks of Component 3 have been carried forward.

or

- A Level awarding: the A Level entry option, where components 1, 2 and 4 are taken and the marks of Component 3 have been carried forward.

The marks from the specific entry options listed above cannot be used as a staged route to complete a full A Level. For information, refer to the *Cambridge Handbook* for the relevant year of assessment at **www.cambridgeinternational.org/eoguide**

Equality and inclusion

We have taken great care to avoid bias of any kind in the preparation of this syllabus and related assessment materials. In our effort to comply with the UK Equality Act (2010) we have taken all reasonable steps to avoid any direct and indirect discrimination.

The standard assessment arrangements may present barriers for candidates with impairments. Where a candidate is eligible, we may be able to make arrangements to enable that candidate to access assessments and receive recognition of their attainment. We do not agree access arrangements if they give candidates an unfair advantage over others or if they compromise the standards being assessed.

Information on access arrangements is in the *Cambridge Handbook* at **www.cambridgeinternational.org/eoguide**

Language

This syllabus and the related assessment materials are available in English only.

After the exam

Grading and reporting

Grades A*, A, B, C, D or E indicate the standard a candidate achieved at Cambridge International A Level. A* is the highest and E is the lowest grade.

Grades a, b, c, d or e indicate the standard a candidate achieved at Cambridge International AS Level. 'a' is the highest and 'e' is the lowest grade.

'Ungraded' means that the candidate's performance did not meet the standard required for the lowest grade (E or e). 'Ungraded' is reported on the statement of results but not on the certificate. In specific circumstances your candidates may see one of the following letters on their statement of results:

- Q (PENDING)
- X (NO RESULT).

These letters do not appear on the certificate.

If a candidate takes a Cambridge International A Level and fails to achieve grade E or higher, a Cambridge International AS Level grade will be awarded if both of the following apply:

- the components taken for the Cambridge International A Level by the candidate in that series included all the components making up a Cambridge International AS Level
- the candidate's performance on the AS Level components was sufficient to merit the award of a Cambridge International AS Level grade.

On the statement of results and certificates, Cambridge International AS & A Levels are shown as General Certificates of Education, GCE Advanced Subsidiary Level (GCE AS Level) and GCE Advanced Level (GCE A Level).

'Cambridge International A Levels are the 'gold standard' qualification. They are based on rigorous, academic syllabuses that are accessible to students from a wide range of abilities yet have the capacity to stretch our most able.'

Director of Studies, Auckland Grammar School, New Zealand

How students, teachers and higher education can use the grades

Cambridge International A Level

Assessment at Cambridge International A Level has two purposes:

- to measure learning and achievement
  The assessment:
  - confirms achievement and performance in relation to the knowledge, understanding and skills specified in the syllabus.

- to show likely future success
  The outcomes:
  - help predict which students are well prepared for a particular course or career and/or which students are more likely to be successful
  - help students choose the most suitable course or career.

Cambridge International AS Level

Assessment at Cambridge International AS Level has two purposes:

- to measure learning and achievement
  The assessment:
  - confirms achievement and performance in relation to the knowledge, understanding and skills specified in the syllabus.

- to show likely future success
  The outcomes:
  - help predict which students are well prepared for a particular course or career and/or which students are more likely to be successful
  - help students choose the most suitable course or career
  - help decide whether students part way through a Cambridge International A Level course are making enough progress to continue
  - guide teaching and learning in the next stages of the Cambridge International A Level course.

Grade descriptions

Grade descriptions are provided to give an indication of the standards of achievement candidates awarded particular grades are likely to show. Weakness in one aspect of the examination may be balanced by a better performance in some other aspect.

Grade descriptions for Cambridge International A Level Global Perspectives & Research will be published after the first assessment of the A Level in 2023. Find more information at **www.cambridgeinternational.org/alevel**

Changes to this syllabus for 2023, 2024 and 2025

The syllabus has been reviewed and revised for first examination in 2023.

You must read the whole syllabus before planning your teaching programme.

Changes to syllabus content	• Small-scale changes to the *Approaches to teaching and learning* section: – definition of key terms has been clarified – list of global topics has been updated. • The learner attributes have been updated. • A glossary of standard command words has been added.
Changes to assessment (including changes to specimen papers)	• The aims and assessment objectives have been updated: – collaboration is no longer part of AO3. AO3 is now called 'Communication' – reflection on the effectiveness of collaboration is now part of AO2. • The number of marks for components has increased. • The weighting of assessment objectives has changed: – less emphasis on AO1 – more emphasis on AO3 in Component 3 – more emphasis on AO2 in Component 4. • The weighting of components has changed: Component 1 is now slightly more heavily weighted in the AS Level. • In Component 1, candidates now need to read both source texts for Question 1. • Component 3: – candidates now have an option to deliver either a live presentation to an audience, or a presentation with a recorded voiceover by the candidate – maximum length of the presentation has been increased to 10 minutes – candidates are now assessed on reflection and evaluation of the effectiveness of collaboration with others – the reference to being innovative has been removed – candidates no longer need to identify and describe a team solution. • Component 4: – research reports are now externally assessed, with separate marks for the research log and the research report – the oral explanation and justification (viva) of the research report has been discontinued – the Outline Proposal Form has been discontinued – candidates must submit a research proposal form at the same time as the research report and log. • The mark schemes have been revised for all components.

In addition to reading the syllabus, you should refer to the updated specimen papers. The specimen papers will help your students become familiar with exam requirements and command words in questions. The specimen mark schemes explain how students should answer questions to meet the assessment objectives.

Any textbooks endorsed to support the syllabus for examination from 2023 are suitable for use with this syllabus.

‘While studying Cambridge IGCSE and Cambridge International A Levels, students broaden their horizons through a global perspective and develop a lasting passion for learning.’

Zhai Xiaoning, Deputy Principal, The High School Affiliated to Renmin University of China

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Cambridge Assessment International Education

Cambridge International AS & A Level

GLOBAL PERSPECTIVES & RESEARCH **9239/01**

Paper 1 Written Exam **For examination from 2023**

SPECIMEN PAPER **1 hour 30 minutes**

0123456789

You must answer on the enclosed answer booklet.

You will need: Answer booklet (enclosed)
Insert (enclosed)

INSTRUCTIONS

- Answer **all** questions.
- Follow the instructions on the front cover of the answer booklet. If you need additional answer paper, ask the invigilator for a continuation booklet.

INFORMATION

- The total mark for this paper is 45.
- The number of marks for each question or part question is shown in brackets [ ].
- The insert contains all the resources referred to in the questions.

This document has **2** pages.

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Read **both** documents in the accompanying insert and answer **all** the questions.

You should spend approximately 15 minutes reading **both** documents in the insert before attempting to answer the questions. This is allowed for in the time set for the exam.

Write your answers to Question 2 and Question 3 in continuous prose.

Medical ethics and priorities

1 **(a)** The author of Document A mentions different types of robot.

Identify **two** robots that are already being used. [2]

(b) The author of Document B refers to a range of ethical issues with using healthcare robots.

Identify **three** ethical issues mentioned by the author. [3]

2 Assess the strengths and weaknesses of the evidence used by the author of Document A to support their claims about the development of robotic healthcare equipment.

In your answer include the impact of the evidence on the author's argument. [15]

3 The two authors present different arguments and perspectives about the development of robotic healthcare equipment.

Evaluate the arguments of both authors. In your answer, consider their perspectives and include a reasoned judgement about whether one argument is stronger than the other. [25]

Copyright Acknowledgements:

Document A © Adapted: Mai Iida; *Robot niche expands in senior care*; The Japan Times; June 2013
Document B © Adapted: Dr Catherine Easton; *Carry on Automaton: Legal and Ethical issues relating to Healthcare Robots*; SCL; May 2013

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CAMBRIDGE
International Education

Globally recognised qualifications

Success in Cambridge qualifications opens doors to universities worldwide. Universities tell us they value the deep subject knowledge, independent research and critical thinking skills that Cambridge qualifications bring. This guide summarises the key admissions requirements for study in popular destinations for Cambridge students. It also highlights some of the higher education institutions that recognise Cambridge qualifications. For a more comprehensive list, search our recognition database at www.cambridgeinternational.org/recognition-search

Destination	Key admissions information	Recognising institutions include:
Argentina 	Most universities recognise Cambridge qualifications from IGCSEs to the AICE Diploma. Cambridge qualifications can earn exemptions, for example from proof of English language ability, or direct entry purposes.	• Instituto Tecnológico de Buenos Aires • Universidad Argentina de la Empresa • Universidad Austral • Universidad de San Andrés • Universidad Torcuato Di Tella.
Australia 	All universities under the Universities Australia umbrella, including the Group of Eight coalition of top universities, recognise Cambridge qualifications. Typically, three A Level passes at minimum Grade C are required for entry to university, while three or four AS Level passes at minimum of Grade C or D are needed for pathway programmes. International students also need to meet English language requirements.	• Australian National University • University of Queensland • University of Sydney • University of Melbourne • University of New South Wales.
Canada 	Over 60 Canadian universities recognise Cambridge qualifications. Students with at least two A Levels can apply to Canadian universities and colleges, but students must check before applying as admissions criteria vary by institution and course.	• Concordia University • McGill University • University of Alberta • University of British Columbia • University of Saskatchewan.
China's mainland 	Cambridge International A Level qualifications give access to many English degree programmes offered by universities on China's mainland. Typically, two to three A Levels at Grade E and above will meet minimum entry requirements. Depending on subject choice, mathematics and one science subject (physics, biology or chemistry) are required for science or STEM (science, technology, engineering, and mathematics) related majors. Scholarship opportunities are offered on a merit or need basis for Cambridge International A Level qualifications. Please check with the relevant university for detailed information. Cambridge IGCSE™ or Cambridge International AS & A Level English at a certain grade will normally satisfy the English language requirement. Bear in mind that some universities require English language certificates to be obtained within a certain time period. For degree programmes in Chinese, universities will also require international students to provide a Chinese language test certificate at HSK 4 or 5 level.	• Peking University • Tsinghua University • Business School, Renmin University of China • Fudan University • Shanghai Jiao Tong University • Zhejiang University International Business School.

Please always check entry criteria directly with universities before applying.

Globally recognised qualifications continued

Destination	Key admissions information	Recognising institutions include:
Colombia 	Most universities recognise Cambridge IGCSEs and Cambridge International AS & A Levels, which can also earn exemptions from proof of English language ability.	· Universidad de los Andes · Universidad Javeriana · Universidad Icesi · Universidad Pontificia Bolivariana · Universidad del Norte.
Egypt 	For the majority of courses, most universities require eight IGCSE subjects at minimum Grade C, plus one A Level subject at minimum Grade D (eight IGCSEs + one A Level or eight IGCSEs + two AS Levels). Subject-specific requirements apply depending on the chosen field of study. Students must also pass the Ministry of Education exams in Arabic, Religious Studies and Social Studies.	· Supreme Council of Universities · Heliopolis University · American University in Cairo.
Germany 	Studying in Germany requires three independent academic A Level subjects with a minimum Grade C. AS Levels cannot be considered instead of an A Level. Subject-specific requirements also apply, depending on the chosen field of study, and on the requirements set by the university. Certain vocational subjects are also accepted for a specific range of courses. Read more on our recognition web page for Germany. You can find full details on the anabin database of the Central Office for Foreign Education (ZAB) at https://anabin.kmk.org/anabin.html (German only).	· Ludwig-Maximilians-Universität München · Freie Universität Berlin · RWTH Aachen · Universität zu Köln · Friedrich-Alexander-Universität, Erlangen-Nürnberg · SDI München.
Hong Kong, SAR China 	Hong Kong universities are very familiar with Cambridge qualifications. Typically, universities ask for three A Levels, with some universities accepting two AS Levels or five/six IGCSEs as equivalent to one of the three A Levels. Language subjects normally are not included in one of the three A Level subjects for admission purposes. Please check with the relevant university for detailed information. Cambridge IGCSE English Language or English Literature provides the required proof of linguistic ability at a number of universities.	· Hong Kong University of Science and Technology · University of Hong Kong · Chinese University of Hong Kong · City University of Hong Kong · Hong Kong Polytechnic University.
India 	Association of Indian Universities, the nodal agency that awards equivalence to foreign qualifications in India, has granted equivalence to Cambridge International A Levels, Cambridge IGCSE and Cambridge O Levels. Private candidates are not awarded equivalence. Universities typically require three A Levels. Entry to professional courses through national entrance tests have higher requirements.	· University of Delhi · University of Calcutta · University of Hyderabad · University of Mumbai · University of Bangalore · Indian Institute of Technology.
Ireland 	Cambridge qualifications are accepted by all Irish universities. Cambridge International A Levels with Grade C or above are required, together with IGCSEs at Grade C. The requirement is normally a total of six distinct subjects (A Levels and IGCSEs combined). Admission is competitive, and higher minimum requirements and subject-specific grades may apply depending on the course and university. This will be indicated on the university's website. Cambridge IPQ is recognised and will score as a Cambridge International AS Level.	· Trinity College Dublin · University College Cork · University College Dublin · University of Galway.
Japan 	Leading public and private universities offer English-based degree programmes, and most such programmes accept Cambridge qualifications for entry. Many of those universities require three Cambridge International A Levels to apply to their courses, and some accept IGCSEs and AS Levels with a combination of one or more A Levels. Read more on our recognition web page for Japan.	· International Christian University · Kyushu University · Nagoya University · Sophia University · The University of Tokyo · Tohoku University.

Destination	Key admissions information	Recognising institutions include:
Malaysia 	Public and private universities are very familiar with Cambridge qualifications – many students apply successfully to private universities, but places are limited in state universities. Typical admissions requirements are three A Levels, but as criteria vary by institution and course students should check before applying.	• University of Malaya • Universiti Sains Malaysia • Universiti Teknologi Malaysia • Universiti Teknologi PETRONAS • Taylor's University.
Netherlands 	Cambridge qualifications are recognised by universities in the Netherlands Students applying to a research university must achieve three IGCSEs at Grade C and above and three A Levels at Grade C and above in six different subjects (for competitive courses, higher and/or additional requirements may apply). Students applying to universities of applied sciences must achieve at least four IGCSEs at Grade C and above and two AS Levels at Grade C and above in six different subjects.	• Delft University of Technology • Leiden University • University of Amsterdam • Saxion University of Applied Sciences • Utrecht University • Radboud University.
New Zealand 	All New Zealand universities recognise Cambridge qualifications. Cambridge International AS or A Level: a minimum of 120 points on the New Zealand Cambridge tariff from any syllabus groups which are broadly equivalent to those in the list of approved subjects for the National Certificate of Educational Achievement (NCEA), and Grade D or above from at least three different syllabus groups (excluding Thinking Skills). Plus literacy (Grade E or above in AS Level English Language, English Language and Literature, English Literature or English General Paper) and numeracy (Grade D or above in IGCSE or GCSE Mathematics or any mathematics subject passed at AS Level).	• University of Auckland • University of Canterbury • Victoria University of Wellington • Waikato Institute of Technology.
Pakistan 	Cambridge qualifications are widely recognised by universities across Pakistan, and by the government of Pakistan. Qualification equivalence is established by the Ministry of Education and can change – students should check entry criteria for both the individual institution and course before applying.	• National University of Sciences and Technology • University of Health Sciences • University of Engineering and Technology Lahore • Dow Medical College.
Singapore 	Cambridge qualifications are widely recognised by universities in Singapore. The application process for public universities is highly competitive – Cambridge students will generally need at least four very strong International A Level grades. Some universities may ask for standardised test.	• National University of Singapore • Nanyang Technological University • Singapore Management University.
South Africa 	Cambridge qualifications are widely accepted by universities in South Africa. Students need to qualify for a certificate of exemption issued by Universities South Africa (USAf), a requirement to pursue first degree studies in South Africa. You can find grading and subject grouping requirements for the exemption at: www.cambridgeinternational.org/recognition	• University of Cape Town • University of Pretoria • Stellenbosch University • University of the Western Cape.

Please always check entry criteria directly with universities before applying.

Destination	Key admissions information	Recognising institutions include:
Spain 	Study in Spain requires five IGCSE/O Level subjects at Grade C or above plus at least three A Levels with a minimum of 48 UCAS tariff points. Up to a maximum of four AS & A Level qualifications can be submitted, i.e., two A Levels + two AS Levels, three A Levels, three A Levels + one AS Level or four A Levels. You can find information on applying with international qualifications at: https://unedasiss.uned.es/home	· ESCP Europe Business School – Madrid campus · IE University – Madrid and Segovia campuses.
UAE 	The UAE Ministry of Education recognises Cambridge qualifications for university entrance. Students must have a Grade E or above in at least five IGCSEs or O Levels, plus two AS Levels or one A Level at Grade D or above.	· American University of Sharjah · Khalifa University · American University in Dubai · University of Sharjah · Zayed University.
UK 	Cambridge qualifications are recognised by UK universities. Universities typically require three A Levels. Different courses require different grades and subject combinations, so students should check entry criteria for both the individual institution and course before applying.	· University of Oxford · University of Cambridge · Imperial College London · University College London · The University of Manchester.
USA 	Cambridge qualifications are widely recognised by US universities, including Ivy League and Ivy Plus institutions. As entry requirements, exemption options, and/or credit arrangements can vary, students should check entry criteria for both the individual institution and course before applying.	· Stanford University · Harvard University · Caltech · University of Chicago · Princeton University.

Applying to university with Cambridge qualifications

Key advice for students

- **Check admissions criteria before applying:** Admissions criteria vary between institutions and courses, and are subject to change. In countries such as the US and Canada, students with good grades in Cambridge qualifications may also be eligible for course credits or advanced standing, reducing the length and cost of their studies.
- **Confirm language requirements:** Students planning to follow an academic course delivered in English may have to demonstrate a specific level of English language proficiency as part of the admissions process. Cambridge qualifications are often accepted as evidence of such proficiency.
- **Research target destinations:** Students planning to study in a different country/region will also need to undertake detailed research into issues ranging from visa requirements to local culture.

Over **2400** institutions worldwide in 95 countries/regions accept Cambridge qualifications

Over **1000** US universities accept Cambridge qualifications, including all the Ivy League

Useful resources

Recognition database

Search our online directory to find out which universities worldwide recognise Cambridge qualifications, and see their entry criteria. Go to: www.cambridgeinternational.org/recognition-search

Country-specific guidance

We publish a range of Destination brochures to give students advice on applying to institutions in countries including Australia, Canada, India, Pakistan, South Africa, the UK and US. You can also find videos on our website filmed in popular student destinations, with advice from admissions officers and former Cambridge students.

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Cambridge Assessment
International Education



Implementing the Curriculum with Cambridge

A guide for school leaders

Last updated in
July 2021

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Foreword

At Cambridge International, we are committed to providing a high level of support for school leaders and teachers delivering Cambridge programmes. The *Implementing the Curriculum with Cambridge* guide is one of the cornerstones of this support and sets out our approach to teaching Cambridge at your school.

It provides a rich resource for school leaders to design, develop and implement the curriculum using Cambridge programmes and qualifications. It sets out some of the principles that underpin an effective curriculum and highlights considerations for school leaders, drawing on case studies and examples.

Nevertheless, at Cambridge, we recognise that the most important work in designing and implementing a school's curriculum is done by its leaders and teachers. It is you who ensure that any programme is adapted to your context, culture and ethos, and is tailored to your students' needs.

This flexibility is a fundamental principle of a Cambridge education. We do not believe that a common prescription is suitable for all countries and contexts. The result of a successful education is so much more than qualifications. It is well-rounded, curious and independent young people, ready to go out and make a difference to the world. We hope our learner attributes can contribute to this by encouraging teachers to focus on the strategies and habits needed for life-long learning within and beyond the taught curriculum.

At the time of writing this foreword, in July 2020, the education world has undergone tremendous disruption as a result of the Covid-19 pandemic. From school closures, to the cancelling of examinations worldwide, no part of our profession has been untouched. When the outbreak struck, the education community adapted swiftly. Schools around the world immediately began teaching and learning remotely, and Cambridge International developed a new system for awarding grades in the June 2020 series. Throughout this process, I've been struck by the strength of collaboration between ourselves and the global community of Cambridge schools, all equally determined to minimise the disruption to learners and allow them to continue their educational journeys.

The consequences of the pandemic are likely to be felt for many years to come. However, the essential building blocks to providing a well-designed and supported curriculum will remain the same.

Notwithstanding the disruption to education in 2020, the world of international education continues to evolve, and we are evolving our support to schools, reflecting our approach to education. The Cambridge family of organisations, including Cambridge University Press and Cambridge English, are working closer than ever together to ensure that we can offer our schools the best possible range of resources and guidance. We have also welcomed CEM into the Cambridge family, to offer formative baseline assessments to support every stage of the Cambridge Pathway.

Whether teaching in school or remotely, this guide is intended to help you make sense of your curriculum and plan for its development.

It should serve as a guide to the wide range of resources – subject syllabuses, learner and teacher support – from which schools can draw in building and delivering a curriculum appropriate to their learners' needs. At the same time, it sets out and explains the principles which we believe should underpin an effective school curriculum – principles based not on ideology but on our own research and that of others – and discusses how these principles can be applied in practice.

Christine Özden
Chief Executive, Cambridge Assessment International Education

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Introduction

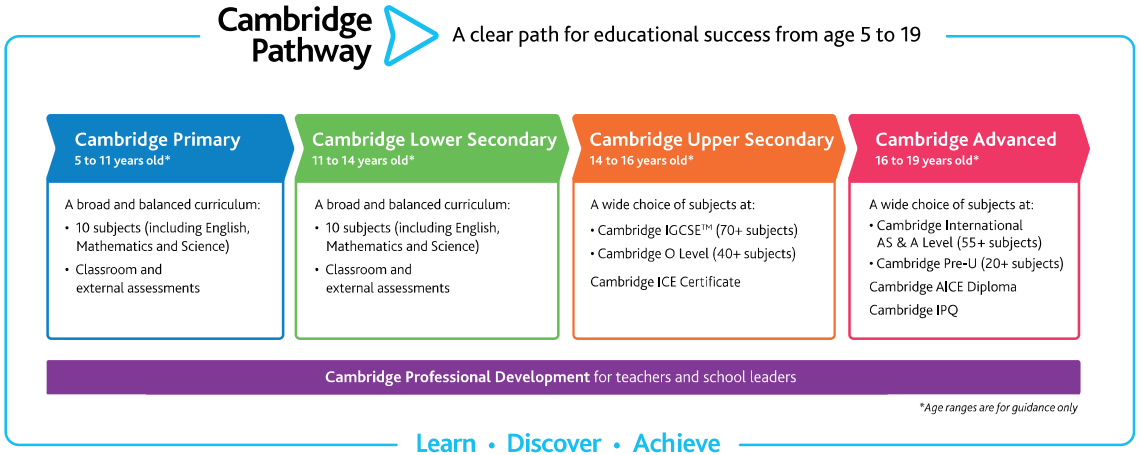
This guide will help school principals, school leaders, and others responsible for the educational programme in a school to design, develop, implement and evaluate the curriculum where Cambridge programmes and qualifications are followed.

Schools require well-designed and well-supported curricula to achieve their educational vision and aims. These aims usually include academic excellence, fulfilling the potential of every learner and nurturing the competencies learners need to succeed in higher education, the world of work and to lead fulfilled lives.

The guide focuses on the curriculum as a whole. It:

- identifies fundamental principles that we believe schools need to engage with while they design, implement and evaluate their curriculum
- considers practices that support these principles
- explains our programmes and the support we offer in detail
- highlights where to find more specific information

Schools are responsible for their own curriculum; our role at Cambridge is to support school leaders make informed decisions. The Cambridge pathway provides a coherent curriculum structure made up of four stages – from Primary to Advanced. Each stage builds on the previous one in a carefully aligned instructional system. Some schools choose to adopt the whole Cambridge continuum, others choose to offer one or two stages, while many schools combine Cambridge with other national and international programmes. This guide is relevant to all of these approaches.



The principles and practices outlined in this guide are based on our experience of listening to what schools want to achieve through their curriculum, and are informed by research-based best practice.

Every school is a unique community with its own identity and will be at a different stage in its evolution; some will be starting up while others will be evaluating where they are with a view to improving provision and practice. This guide is written with this fact in mind.

Curriculum, pedagogy and assessment are inherently linked. Hence, this guide focuses on curriculum within the context of the broader school policies and practices in which it is embedded. Developing the curriculum involves building school capacity, structure and operations to support it. This guide relates to all of these facets of effective schools.

Cambridge has produced two other guides and a series of resources that complement and further develop many of the points made in this guide.

1. Developing your school with Cambridge
2. Developing the Cambridge learner attributes
3. Other resources in our teaching and learning area including education briefs and getting started with guides.

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1. Curriculum planning: An overview

This chapter considers what the curriculum is and how it should be derived from the school's educational vision. It highlights the fact that qualifications form only part of the curriculum. Every school is unique and school leaders must consider how to support its implementation, which may necessitate changes to a school's structure and operations. We introduce some fundamental principles that need to be considered in the curriculum design process. Chapter 2 of the learner attributes guide provides further guidance.

1.1 What is curriculum?

Across the world, the term curriculum is used in several different ways.

In some countries, 'curriculum' has a holistic meaning encompassing not only subjects, but also the connections between subjects, teaching methods and all aspects of schooling that define the learner's experience. In other countries, a narrower interpretation is used, referring either to a prescribed range of courses (the curriculum in Year 6 contains eight different subjects) or a specific learning programme across different years (the chemistry curriculum at secondary level). This guide uses the following definitions:

- A **school curriculum** refers to the combination of subjects studied within a school year and in sequential years as the learner moves through the educational system provided by the school.
- A **subject curriculum** refers to the content and skills contained within a syllabus applied across sequential stages of student learning. These stages normally refer to school year levels, and therefore a particular age of learner.
- **Co-curricular curriculum** refers to valued educational activities that support learning beyond the school curriculum, which the school encourages and supports.
- The **experienced curriculum** refers to the learning students actually receive as a result of the whole educational experience the school provides. This includes the impact of the school curriculum, teaching approaches, the co-curricular curriculum and the learning environment. It includes both the planned and unplanned or unintended outcomes of the curriculum.

The wider learning experience:

Planning the school curriculum in terms of subjects and qualifications is only part of the process. The experienced curriculum in an excellent school provides a learning experience that is more than the sum of the qualifications, subjects and activities that are visible on the school schedule. This is because careful attention in curriculum design and implementation is given to learning within, across and between the subjects and activities. All teachers and school staff support the development of the learner attributes and other qualities identified in the school's vision. Breadth, balance and coherence need to be built in by design. The school's vision and aims will include personal and social outcomes as well as academic ones. Learning does not begin or end in classrooms, but permeates the school environment and broader community.

What learners actually experience may not be the same as the written objectives of the curriculum – it will be the consequence of a complex web of interdependent parts including:

- the school's vision and values
- teaching quality
- learner motivation and prior knowledge
- school leadership, environment and culture
- the school's curriculum and subject curricula
- assessment practices and expectations
- the school's internal structures and operations.

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Therefore, the experienced curriculum is necessarily unique to each school, and designing or re-evaluating a curriculum is a complex and challenging task. Schools should regularly evaluate their outcomes against intentions, ensuring that they are optimising learners' educational experiences in line with the school's vision and mission.

School vision, mission and plan:

The school vision is a compelling sense of the future direction of the school. It should inspire commitment from the whole school community and be widely shared.

Most schools also have a mission statement, which is a written declaration defining the school's educational purpose. Educational aims might be included in the mission statement or listed separately. Together with the vision and mission, they provide focus and guidance on what the priorities are.

The school strategic plan gives practical direction to the vision, mission statement and aims. This should include a statement headlining longer-term priorities/ objectives of up to five years ahead, and a detailed one-year implementation plan.

Curriculum planning:

Table 1 below outlines some of the many questions that schools need to address when planning the school curriculum. It shows that these decisions must be based on the school's vision, mission and educational aims, taking into consideration school structures and building school capacity.

> "The school vision is a compelling sense of the future direction of the school. It should inspire commitment from the whole school community and be widely shared."

Table 1: Curriculum planning within a school context: Some critical questions

School Vision and Strategic Planning – achieving the desired learning outcomes	
Building school capacity	**Structure and operation**
Learners What are the expected academic, personal and social outcomes? Which skills and competencies should learners acquire through the curriculum? How will the curriculum motivate, engage and challenge learners? Is the curriculum relevant to the needs of learners – now and in the future? What attributes are being modelled for learners across the school?	Designing a curriculum Which Cambridge programmes and subjects will be included and how will these complement other educational programmes and qualifications offered by the school? Does the curriculum reflect the school's vision and context? How will learning within local or national contexts be developed in the curriculum? How will the school support learners who do not have English as a first language? Which subjects will be taught in English? (In bi-lingual schools)

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School Vision and Strategic Planning – achieving the desired learning outcomes	
Building school capacity	**Structure and operation**
Teachers Which pedagogical and assessment practices should lie at the centre of teaching and learning? What teacher professional development is required to ensure effective planning and delivery of the curriculum? How will teachers be encouraged to self-reflect on their current teaching practices and the learning achievement of their students based on meaningful evidence? Is there provision for teachers to undertake relevant professional qualification courses to enhance their professional learning and the quality of student learning experiences? How will teacher professional development remain relevant and targeted?	Qualifications Will the school offer national as well as Cambridge qualifications? Is progression from one level to the next coherent? Will there be any scheduling or organisational difficulties if dual qualifications are offered? Will these combinations of qualifications support learners applying to higher education (in secondary schools)?
Leadership and Management Does the school have an effective governance structure with clear roles and responsibilities? What role do school administrators have in the delivery of the curriculum and in supporting teachers? How do leaders know that effective teaching and real learning are taking place in classrooms? How is the school measuring the impact of the curriculum? And what are they doing with this information? Are effective collegial and collaborative team structures and dynamics operating school-wide and within subject/learning areas? Are inter-school networking opportunities available for teachers and school leaders to support the implementation and development of the curriculum? How will the school engage with/use professional learning networks? Has the leadership team communicated the school vision to all stakeholders appropriately and effectively?	Timetabling How many subjects will be studied and for how many hours in each subject? How will this vary from one year to the next as learners progress through the school? Will the curriculum be fixed (compulsory) or provide a measure of learner subject choice? How will such flexibility be balanced against the school's current resourcing and staffing provisions?

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School Vision and Strategic Planning – achieving the desired learning outcomes	
Building school capacity	**Structure and operation**
School and the community What involvement will school support groups and other community groups have? What contributions can these groups make in the development of the curriculum? How can the resources of the local community be linked into the school curriculum?	Facilities What facilities will be required to accommodate the requirements of specialist subjects? Does the school provide appropriate learning environments for studying all subjects in the curriculum?
	Resourcing What financial provision is available for delivering the curriculum, in terms of teaching resources, teacher support and administrative requirements? Does the school have effective communication and co-ordination systems and structures for implementing, managing and refining the curriculum?

1.2 Principles fundamental to successful curriculum design and implementation

Cambridge schools operate in a wide range of contexts with differing demands and expectations. The curriculum is at the heart of schools' strategies to raise achievement and improve outcomes for all learners. While some schools will prefer to offer a curriculum made up entirely of combinations of Cambridge courses, combining these to form a programme of study, other schools will select individual subject syllabuses and combine them with qualifications and educational programmes from other national or international providers.

We believe that certain principles are fundamental to successful curriculum design and implementation in all situations:

1. The school curriculum should deliver a broad, balanced and consistent programme of learning with clear and smooth progression routes designed for the needs of all learners.

When planning the school curriculum, the school leadership must choose both the subjects to be studied for each year, as well as a sequential programme from one year to the next. Time and resource limitations mean that school leaders must carefully prioritise and make choices when planning a curriculum. Different societal or cultural norms will influence this process of prioritisation and there is no one-size-fits-all solution.

Certain considerations are, however, universally significant:

- The **values and educational aims** of the school must guide all decisions about the curriculum. Normally this results in a balance of subjects and activities covering different educational processes, objectives and content, developing a holistic set of skills and knowledge.
- **Quality** is more important than quantity. It can be tempting to add more subjects and/or content to the curriculum, with the noble intention of maximising learning. Too much content, however, does not allow time to support depth of understanding and the practice students need for deep learning. Less can actually be more.
- **Progression** through the curriculum must be consistent. The curriculum should give learners the understanding, knowledge and skills they need to allow them to progress to the next educational stage.

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- A spiral approach to skill development is supported. Each successive stage revisits critical learning areas and builds on them, respecting the learners' developmental stage.

In addition to these universal considerations, other aspects for a school to consider include:

- Consistency – This is concerned with progression in knowledge and skills from one stage to the next. Do the different stages align? Are learners appropriately prepared and challenged at each stage? It is reasonable to expect changes in emphasis and approach as learners become more mature. Consistency does not mean that the curriculum will stay the same, but it is important for changes to be planned rather than unintentional.
- Balance – The concept of breadth and balance will be illuminated by the school's vision and educational aims. A balanced curriculum normally includes mathematics, languages, sciences, technology, humanities, creative arts and physical education. A broad curriculum allows learners to experience, acquire and develop essential and valued learning from a variety of contexts. It may be that some disciplines, for example information technology, are infused in the teaching of other subjects rather than being taught as a discrete subject. There is still the need for a clear identification of these activities, supported by a written curriculum that helps define precisely who is responsible for their development. It is also important that literacy and numeracy are supported by teachers of all subjects, not just in languages and mathematics.
- Preparation for higher education – In the senior years of schooling, some narrowing of the curriculum may be expected as learners prepare for specific qualifications required for progression to higher education. Learners should still be expected to take part in activities and programmes that are complementary to the academic qualifications they are preparing for, and the school should provide a breadth of activity and engagement in support of the school's mission.



- Combining curricula – The school is combining Cambridge qualifications with others, it is important to consider compatibility issues. It may be that other qualifications or programmes of study incorporate different approaches to teaching, learning and assessment from those described in this guide. This will require careful planning and coordination to ensure that any differences are clearly understood and accommodated.
- Effectiveness – Cambridge's syllabuses, teacher support material, teacher professional development and assessments are designed by subject experts to support a smooth progression from primary to upper secondary, but it is up to the school to make it happen. It is essential that schools create their own schemes of work and lessons plans to make the Cambridge syllabuses locally relevant and make sure teachers are teaching these effectively. The curriculum is locally constructed in the school.

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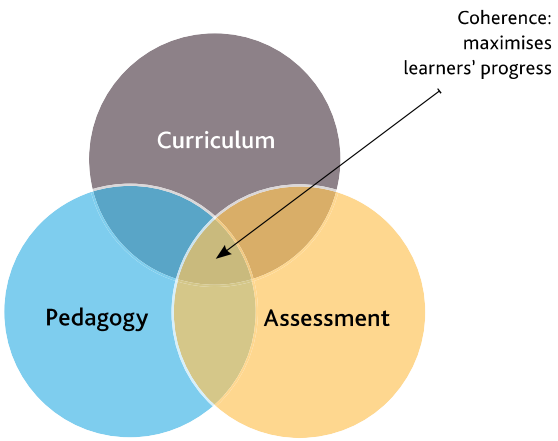
2. The instructional system is well aligned and coherent

A well-designed instructional system is more than the sum of its parts. A curriculum is coherent when the prescribed content, textbooks, resources, and approaches to teaching and assessment are aligned and reinforce one another.

The learning experiences should be thoughtfully sequenced to respect students' developmental stages. The content of the curriculum, the pedagogical approach and the assessment approach must also be aligned in order to maximise learner development and achievement.

Cambridge syllabuses, teacher support material, endorsed textbooks and Cambridge professional development opportunities are designed to ensure alignment of the curriculum and pedagogy. Cambridge assessments are designed to ensure that they are valid, only assessing what is clearly defined in the syllabus assessment objectives.

Figure 1: An aligned instructional system



3. The curriculum supports the development of learners and teachers who are confident, responsible, reflective, innovative and engaged.

To help schools develop good learning habits, Cambridge has developed the learner and teacher attributes (see table 8 in chapter 3). Learning habits describe how students and teachers approach a given situation, environment or challenge. They include a combination of values, attitudes, knowledge, skills and strategies and assume competence – the skilled and appropriate application of the attribute.

Many schools have additional learner attributes, reflecting their school mission, and the way that the attributes are used varies widely. The ● **Developing the Cambridge learner attributes** guide provides a comprehensive resource for schools to consult.

4. Each subject curriculum should provide learners and teachers with inspiring and relevant content and an appropriate breadth and depth of subject knowledge.

Subject curricula should be formulated chronologically in a learning spiral so they provide appropriate progression from one stage of education to the next. The knowledge, understanding and skills acquired at each year level forms the foundation for learning at the next. In order to develop a deep level of understanding, while building a solid foundation for future progression, learners need to revisit and practice important knowledge and skills repeatedly in a number of different contexts. In planning the curriculum, time for this needs to be allowed so that depth of coverage is supported, reinforcing prior learning and creating links to new learning.

Cambridge offers subject curricula that are based on specified educational standards appropriate to the learners' development stage across the years of schooling. We work closely with universities and other higher education providers around the world to ensure they recognise our qualifications and that our qualifications provide the best possible preparation for students to do well in their studies once they get into University.

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5. The school curriculum should recognise the language background of learners and provide them with the support they need to access the curriculum.

Schools almost always have learners with a range of exposure to and competence in different languages. This reality must be reflected in curriculum planning and in a coherent language policy reflecting the school's situation.

Language needs to be prioritised in the curriculum. Learners need to have excellent skills in their native or first language as this will directly influence their cognitive development in all subject areas. They also need to have excellent English language skills in order to access the curriculum if it is taught through the medium of English.

Students attending international schools are often learning the curriculum through the medium of English, so developing a high level of English language competence will help them learn. It is also critical that students continue to develop their first or best language. Language development helps develop student identity, international understanding and the Cambridge learner attributes.

All Cambridge qualifications are assessed in English. Learners must therefore develop sufficient skills in reading and writing in English to be able to take Cambridge assessments. However, they also need English speaking and listening skills to be able to learn effectively. Learning through English becomes an integral component of study. Schools develop a range of strategies that allow learners to progressively advance these skills prior to taking examinations. One such strategy is for all teachers to be 'language aware' - planning language support in their classes, and enabling them to be language teachers as well as teachers of their own subject disciplines.

Cambridge supports schools who want to use bilingual education programmes. This is where two or more languages are used as the medium of instruction for non-language subjects. Learners study some non-language school subjects, such as maths or geography, mainly through a second or third language, and some subjects through their first language. The understanding of bilingual education is linked to other educational concepts such as content and language integrated learning (CLIL). Here, in content classes, learners develop subject knowledge and new language skills at the same time. If dual national and international qualifications are being offered, the curriculum may specify subjects that will be taught through either English or the first language, that is, in a bilingual curriculum design. To find out more about our approach to bilingual education visit www.cambridgeinternational.org/bilingual

> "We are aware that most learners completing our programmes and qualifications are operating in a language that which is not their first language. Examiners apply a positive marking approach, looking to award marks when a learner has demonstrated understanding."

We are aware that most learners completing our programmes and qualifications are operating in a language that which is not their first language. Examiners apply a positive marking approach, looking to award marks when a learner has demonstrated understanding. Learners are not penalised for spelling and grammatical errors except in the assessment of languages which are testing language skills.

6. Assessment has a number of purposes that are essential to the educational process.

These purposes include assessment for learning (providing feedback in support of the learning process), and summative assessment (determining a learner's level of performance).

Assessment is an integral component of each subject's curriculum. Pedagogy and assessment are inseparable in the teaching and learning process, as development in one reciprocates change in the other. Assessment for learning practices are essential teaching strategies that inform teachers and learners about the current level of understanding and skill acquisition during the actual teaching phase, providing guidance and feedback for subsequent teaching. Summative assessment is carried out at the end of a period of learning and its

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purpose is to judge what standard the learner has reached. The final assessments in many Cambridge qualifications are high stakes because results influence progression onto the next stage of education or higher education, and can be used to make external judgements (for example by a university) of the learner's level of performance.

7. Clear and meaningful educational standards are essential to ensure accurate measurement of progress and achievement and allow for international benchmarking and comparability.

Clear standards are necessary for defining learning expectations, measuring progress, setting targets, comparing performance and certifying attainment. They are also critical to help teachers understand learners' strengths and weaknesses and to help learners understand their own learning progression. Assessment of specific and transparent educational standards enables the benchmarking of learner achievement on a local (school), national and international scale. Cambridge uses a number of different standards in relation to our syllabuses and assessments that are considered in detail in our code of practice document. Our teaching resources and endorsed textbooks exemplify these. For information on our school leader and school teacher standards see here and on our school self-evaluation standards see here. Cambridge ensures that all its high-stakes summative assessments are valid, reliable and fair, while adhering to the highest technical standards.

8. Teachers are the most powerful influence on student learning.

Reflective practice supported by professional development is an essential and continuous part of a teacher's life.

Curriculum is intertwined with pedagogy and effective teaching practice is a necessary condition for effective curriculum implementation. Teachers make the curriculum real by translating learning and assessment objectives, syllabus aims, subject content and school policy into meaningful learning experiences. The learner attributes apply to both teachers and learners, as teachers are required to exemplify the processes and practices expected of learners.

Systematic teacher professional development (PD) is therefore a critical tool to enhance both student learning and school performance. Cambridge provides a range of PD opportunities and resources aligned to the different backgrounds and levels of experience of teachers.

These support the teaching of Cambridge programmes and qualifications and the development of pedagogical skills. They help teachers to become confident, responsible, reflective, innovative and engaged. There are also numerous other excellent PD options that teachers can follow. Professional development should not be confined to Cambridge offerings, but does need to be consistent with the principles described in this guide.

One purpose of PD is supporting evidence-based reflective practice in day-to-day teaching. One of the best ways of achieving this is through teachers working collaboratively in professional learning communities and networks of local schools, but they can also draw on the wider international Cambridge community. Digital communications such as the internet let us easily, efficiently and economically share experiences, ideas and initiatives across the community, with our common goal of improving the quality of teaching and learning for all.

Experienced teachers are encouraged to become Cambridge teacher trainers and examiners. Being an examiner or trainer is a most effective way of developing teachers' own practice, helping to improve professional practice within their school as well as contributing to the wider Cambridge International community.

9. The pedagogy required to optimise learning using Cambridge curricula requires the active engagement of the learner.

Good teaching practice is not something that can be easily prescribed, and there are important cultural and local influences that will help to define what 'good' means. One universal principle fundamental to all effective approaches is that the learner must be actively engaged in their own learning.

Knowledge and understanding cannot be transmitted from the teacher to the learner. The learner's existing mental models must be challenged and extended. Teachers have to constantly listen to the voice of the learner, both in the classroom and in the work they produce, and engage with it to support learning

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and understanding. This process helps learners become independent, as they start to model the teacher's approach.

Active learning requires teachers to lead learning, not just be facilitators of learning. This involves constantly monitoring the impact of their instructional approaches and adjusting what they do based on feedback. They need to build meaningful links in learners' minds between prior and newly acquired knowledge and understanding, while providing appropriate challenge.

10. Strong leadership is a necessary condition for sustained school improvement and curriculum development.

School leaders contribute in a variety of ways to the design and successful implementation of the school curriculum. Schools are a complex web of interdependent parts, and responsibilities of school leadership include getting the best out of both individuals and the system, and developing the system to better achieve the school's mission.

Excellent school leaders create the conditions to realise teachers' potential. Teachers should themselves be viewed as leaders. They lead in the classroom by making the curriculum real to learners and creating opportunities for student learning. Teachers, as reflective practitioners, can also play an important role in school improvement and become positive agents of institutional change.

11. Curriculum development involves an ongoing process of evidence gathering and evaluation.

Schools are in a constant state of development, evolving as they respond to changing internal needs and externally imposed requirements. Conducting regular reviews of the school curriculum, and the effectiveness of its implementation and delivery, should be a priority. School leaders and teachers need to be concerned with measuring the impact of the curriculum. Is it actually delivering what it intends? How do we know? What are the perceptions of students? Such reviews are fundamental elements of the annual school management cycle – a process of goal setting, monitoring, evidence collecting and evaluation leading to affirmation or refinement of the school's strategic plan.

12. The curriculum needs to ensure all learners fulfil their potential.

Effective schools can be defined as those that successfully progress the learning and development of all of their students, regardless of intake characteristics, beyond the normal development curve. Schools support all learners to fulfil their potential and overcome any barriers to learning they encounter.

> “Effective schools can be defined as those that successfully progress the learning and development of all of their students.”

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2. Designing the school curriculum

This chapter provides guidance to those who are responsible for designing the school curriculum using Cambridge programmes and qualifications. The chapter describes the Cambridge pathway, giving an overview of the structure of Cambridge programmes from Primary to Advanced. It discusses the practical implications of introducing a curriculum, including timetabling and adapting to different local requirements for the formal years of schooling. Finally, this chapter shows how Cambridge programmes can be used to support the development of bilingualism.

Flexibility is a key feature of Cambridge programmes. Educational needs are not the same everywhere. Cambridge offers a rich menu from which to select, not a total package which schools have to adopt. Schools can use Cambridge alongside local educational programmes and qualifications to meet their needs and requirements.

2.1 The Cambridge Pathway

The Cambridge Pathway is made up of four stages and is characterised as follows:

- Each subject programme builds on the previous stage, providing a coherent curriculum progression. This staged approach helps learners develop knowledge, conceptual understanding, skills and attitudes.
- It is important to distinguish between the written Cambridge programmes, as defined in the documentation and syllabuses, and the taught curriculum in the school, representing the local expression of the programmes. Each subject programme is intended to be adapted to the local context and teachers are able to create a programme of study that includes local content and case studies. This enhances the quality of teaching and learning, and ensures the curriculum reflects national culture and heritage.
- Cambridge's international qualifications are pitched at three levels. The end of upper secondary (IGCSE or O Level) provides an international standard that allows students to access Cambridge AS and A Levels or alternative university preparation courses. In some contexts, students can enter university foundation programmes directly with IGCSE qualifications. At advanced level, the AS standard represents the entrance standard for universities in many countries, with A Level offering advanced placement or credit. In other countries, A Level is preferred or required for direct university entry.



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Table 2: An overview of the Cambridge Pathway and Cambridge Programmes

Cambridge programme	Subjects	Assessment
Cambridge Primary		
Typically for 5–11 year olds. The curriculum frameworks provide comprehensive learning objectives. These provide a structure for teaching and learning and a reference against which learners' progress and understanding can be checked. No part of the curriculum is compulsory, so schools can select the elements that are right for their learners. Develops the skills, knowledge and understanding that will prepare learners for a smooth transition to Cambridge Lower Secondary.	A six-stage programme that provides curriculum frameworks and support materials for each of the following subjects: • Art & Design • Digital literacy • English • English as a second language • Cambridge Global Perspectives • Computing • Mathematics • Music • Physical education • Science Each stage reflects the teaching targets for a school year. The curriculum frameworks are divided into content areas called 'strands'. For English, for example, the strands include reading, writing and speaking and listening.	An optional testing structure, with assessments that provide an international benchmark enabling teachers to: • identify learner strengths and weaknesses, both for individual learners and class groups, and use the information to help inform teaching • provide learners with a statement of achievement if they choose to do Cambridge Primary Checkpoint at the end of their primary schooling. Cambridge Primary Progression tests From stage 3 to stage 6 of the curriculum in English, English as a second language, mathematics and science. Can be given when the teacher feels the class is ready. Marked by teachers in school. Cambridge Primary Checkpoint Cambridge provides diagnostic tests for the end of the Primary programme for English, English as a second language, mathematics and science. Cambridge marks the tests and provides feeback on the strengths and weaknesses of each learner. Cambridge Primary Global Perspectives is assessed through a Team Project. This is marked by teachers and moderated by Cambridge. We provide assessment guidance for art & design, computing, digital literacy, music and physical education.

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Cambridge programme	Subjects	Assessment
Cambridge Lower Secondary		
Typically for 11 to 14 year-olds. The curriculum frameworks provide comprehensive learning objectives. These build on the foundations of Cambridge Primary and help learners to progress smoothly to Cambridge Upper Secondary. No part of the curriculum is compulsory, so schools can select the elements that are right for their learners.	A three-stage programme that provides curriculum frameworks and support materials for each of the following subjects: • Art & Design • Digital literacy • English • English as a second language • Cambridge Global Perspectives • Computing • Mathematics • Music • Physical education • Science Each stage reflects the teaching targets for a school year. The curriculum frameworks are divided into content areas called 'strands'. For English, for example, the strands include reading, writing and speaking and listening.	An optional testing structure, with assessments that provide an international benchmark enabling teachers to: • identify learner strengths and weaknesses, both for individual learners and class groups, and use the information to help inform teaching • provide learners with a statement of achievement if they choose to do Cambridge Lower Secondary Checkpoint at the end of their Lower Secondary schooling. Cambridge Lower Secondary Progression Tests are available for each stage of the curriculum in English, English as a second language, mathematics and science. Can be given when the teacher feels the class is ready. Marked by teachers in school. Cambridge Lower Secondary Checkpoint Cambridge provides diagnostic tests for the end of the Lower Secondary programme for English, English as a second language, mathematics and science. Cambridge marks the tests and provides feeback on the strengths and weaknesses of each learner. Cambridge Lower Secondary Global Perspectives is assessed through a Research Report. This is marked by teachers and moderated by Cambridge. We provide assessment guidance for art & design, computing, digital literacy, music and physical education.

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Cambridge programme	Subjects	Assessment
Cambridge Upper Secondary		
Typically for 14-16 year-olds, the syllabuses for qualifications within this programme describe the knowledge, understanding and skils learners will develop and explain how these will be assessed. Cambridge Upper Secondary provides excellent preparation for the next stage of a Cambridge International education, Cambridge Advanced, as well as other progression routes.	Designed as a two-year programme but can be taken in one year or over three years. Offers over 70 IGCSE courses and over 40 O Level courses. Schools can offer almost any combination of subjects (with a few restrictions known as 'barred combinations'). Learners receive a certificated grade for each subject they take.	Cambridge IGCSE assessment takes place at the end of the course. There is a range of types of assessment, including written, oral, coursework and practical assessment. In mathematics, science and English as a second language there is a tiered structure with the option to enter candidates for Core or for Extended tier, [see page 22 on tiering]. Grades are awarded from A*–G (or from 9–1 if available in the administrative zone/subject). The grade set is capped at Grade C (Grade 5 for 9–1 grading) for Core candidates. Cambridge O Level assessment takes place at the end of the course. There is a range of types of assessment, including written, oral, a limited amount of coursework and practical assessment. Grades are awarded from A*–E. Cambridge O Levels are no longer available to schools in administrative zones 1, 2 and 6. There is more information on administrative zones at www.cambridgeinternational.org/help

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Cambridge programme	Subjects	Assessment
Cambridge Advanced		
Typically for 16–19 year olds, Cambridge Advanced builds on the foundations of Cambridge Upper Secondary and leads to entry to universities worldwide. The focus is on helping learners to develop deep understanding and independent learning and critical thinking skills, which universities value highly. The syllabuses for qualifications within this progarmme describe the knowledge, understanding and skils learners will develop and explain how these will be assessed.	Offers a choice of 50 different subjects and schools can offer almost any combination. A staged approach is available in almost all subjects. An AS Level contains half the content of the corresponding A Level and is normally completed in one year. This allows for flexibility, as learners can complete AS Levels as qualifications in their own right or as the first half of an A Level. The Pre-U programme is available to schools in the United Kingdom. Schools outside the UK need special approval before they can offer Cambridge Pre-U subjects.	Cambridge International AS & A Levels use a range of assessment types, including formal written examinations, orals, practicals and coursework. A level grades range from A* to E. They are directly comparable in standard to A levels awarded in the United Kingdom. Assessment of Pre-U Principal Subjects is at the end of a two-year course. There is a range of nine grades, D1–P3.

There is much more specific information, including details of all the courses available at each stage, in the *Cambridge Prospectus*, available here.

2.2 Cambridge Primary

Designed for 5–11 year olds, Cambridge Primary is structured through curriculum frameworks in 10 subjects including English, English as a second language, mathematics, science and Cambridge Global Perspectives. Each framework is divided into six stages, normally taught over one year each, but they can be covered over shorter or longer time periods depending on the school's circumstances. No subject in the Cambridge Primary programme is compulsory, so schools can select the elements that are right for their learners. Cambridge provides a wide range of support for teachers to help them deliver each curriculum in their context.

The curriculum frameworks are structured by the key 'strands' of learning in each subject. The learning objectives in each strand then clearly show the teaching targets for each stage. Cambridge regularly and systematically reviews each curriculum framework to make sure that primary learners develop a solid foundation in each subject and are well prepared to progress to Cambridge Lower Secondary.

Cambridge Primary English is intended for first language learners who have well-developed oral language skills before they begin school. Therefore, learners are expected to produce language orally and in writing from the earliest stages. This curriculum provides a foundation in language and literacy on which later stages of education can be built. With its emphasis and early focus on literary analysis and critical reading skills, it promotes an understanding of how different language features are used and the impact these have on the reader. It fosters literary appreciation and prepares learners to become skilled users of the language in many contexts.

Primary English as a second language is designed to prepare learners to become skilled users of English as a second language for practical purposes, including

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using English for functional communication and learning other curriculum subjects. It is designed for speakers of other first languages who are learning English as a second (or additional) language. It has been developed in conjunction with Cambridge Assessment English and is based on the Council of Europe's Common European Framework of Reference for Languages (CEFR), used across the world to map learners' progress in English (see page 28). The curriculum can be used to support the implementation of bilingual and multilingual education programmes, where subjects are taught through two or more languages.

The **mathematics** curriculum framework explores principles, patterns, systems, functions and relationships, so that learners can apply their mathematical knowledge and develop a holistic understanding of the subject. It is structured in three content areas: Number, Geometry and Measure, Statistics and Probability. Thinking and Working Mathematically underpins all of the other areas of learning to assist learners in considering the processes involved when solving problems.

Our Computing curriculum introduces learners to block-based programming and how to write clear instructions that computers can use. This helps them to understand how software drives what happens inside each piece of computer hardware.

Computing has five content areas: Computational thinking, Programming, Managing Data, Networks and Digital Communication, and Computer Systems.

The **science** curriculum framework has six strands: A skills strand Thinking and Working Scientifically, Four content strands - Biology, Chemistry, Physics and, Earth and Space, A context strand - Science in Context. In every part of the programme learners think and work scientifically and do hands-on science using everyday equipment. This helps learners to develop an understanding of scientific investigations including considering ideas, evaluating evidence, planning, investigating, recording and analysing data. The content in the Biology, Chemistry, Physics and, Earth and Space strands introduce learners to the main areas of science, while the Science in Context strand also places these in a broader cultural and historical context.

Cambridge Primary Global Perspectives develops the skills of research, analysis, evaluation, reflection, collaboration and communication. The skills are taught



through a wide range of topics using personal, local and global perspectives. It strengthens the links across the other subjects in the primary programme and provides an interdisciplinary approach to learning. Flexible delivery options are a key characteristic of the programme and it can be taught as a weekly lesson, integrated into other subjects or through occasional full days of activities.

Find out more about how the Cambridge Global Perspectives primary programme is taught and assessed.

The art, digital literacy, music and physical education curricula have unique features. The art curriculum has learning objectives that describe the concepts and approaches that apply to artists of all ages and levels of expertise. For this reason, the same learning objectives are used to structure learning from Stage 1 to Stage 6. The digital literacy curriculum covers digital skills that students need today but they will also acquire knowledge and understanding about safety and wellbeing online that will equip them for the future. The music curriculum emphasises musical exploration with opportunities for learners to perform and present their music at every stage of development. The focus is on play and on

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responding to music which leads to an increasing awareness of self and personal musicality. The physical education curriculum is a vital part of a balanced Cambridge school curriculum. Regular exercise improves both physical and mental health and there is growing evidence that it improves academic performance across the curriculum. Establishing good patterns of exercise in primary schools also provides learners with the foundation of an active and healthy lifestyle for life.

Cambridge Primary testing:

Cambridge Primary includes two voluntary testing options: Progression Tests and Primary Checkpoint. These are used by schools globally to monitor their learners' progress and attainment against an international benchmark.

Cambridge Primary Progression Tests can be used whenever a class is ready to be assessed on their learning from a stage of the curriculum framework. Once teachers have marked the tests, they can use the unique analysis tools provided by Cambridge to produce detailed reports from the results. These highlight the strengths and weaknesses of learners so teachers can make targeted improvements to teaching and learning. Learners' results can be compared against their class, school or other schools around the world, and on a year-by-year basis.

Primary Checkpoint is for learners at the end of the final year of Cambridge Primary. It provides evidence of readiness for the next stage of education, assessing skills, knowledge and understanding. English, English as a second language, mathematics and science are all assessed through written tests provided and marked by Cambridge. Cambridge Primary Global Perspectives is assessed through a Team Project which is marked by teachers and moderated by Cambridge.

For more information see here.

2.3 Cambridge Lower Secondary

Designed for 11–14 year olds, Cambridge Lower Secondary builds on the learning from Cambridge Primary and prepares learners for Cambridge Upper Secondary study. As with the primary programme, no part is compulsory and schools can select which elements will be most useful for their learners. There are three stages in the curriculum framework for each subject. These are commonly taught over one year for each stage, but they can be taught over shorter or longer time periods, depending on the school's circumstances.

Cambridge regularly and systematically reviews each curriculum framework to make sure that lower secondary learners build on their learning in primary and are effectively prepared for Cambridge Upper Secondary qualifications.

Cambridge Lower Secondary English is intended for first language learners, or those with an equivalent competence in English. Learners build on their understanding and use of language features and become more sophisticated in using language effectively in a range of oral and written contexts. They also continue to develop their literary analysis and critical reading skills. This programme provides learners with the language and literacy skills they need for further study and life. In addition it prepares them for Cambridge Upper Secondary qualifications in English literature, language and drama.

Cambridge Lower Secondary English as a Second Language continues seamlessly from the primary curriculum, developing independent users of English (B1 and B2 on the CEFR see page 28). This programme provides learners with the English language skills they need to access Cambridge Upper Secondary qualifications through English. In addition, learners can continue their studies to Cambridge IGCSE English as a second language.

The **mathematics** curriculum continues to emphasise Thinking and Working Mathematically. Algebra is formally introduced, building on concepts from the Number strand in the Primary programme, alongside Number, Geometry and Measure and Statistics and Probability. This programme leads to upper secondary qualifications in mathematics. It also provides learners with the numeracy and statistical literacy needed for life as well as further study in a wide range of subjects (such as sciences and social sciences).

Our computing curriculum furthers learners knowledge of programming languages by introducing text-based software. Learners will explore algorithms using flowcharts and pseudocode, spreadsheets and databases, data transfer across networks and new technologies such as Artificial Intelligence.

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The science curriculum framework builds further understanding of Biology, Chemistry, Physics, Earth and Space and, Thinking and Working Scientifically. All of the science disciplines are taught in each stage so that learners develop an integrated view of science. The emphasis on scientific investigations continues from primary with learners being introduced to specialist scientific equipment, where available. This programme prepares learners for all of the scientific qualifications available at upper secondary level.

Cambridge Lower Secondary Global Perspectives continues to use a range of topics to develop the skills of research, analysis, evaluation, reflection, collaboration and communication. Learners identify a wider range of personal, local and global perspectives and begin to evaluate why these may be different. As with the primary programme, it is designed to be delivered flexibly through specific lessons, existing subjects or full days of activities. The skills developed prepare learners for all upper secondary subjects and they can continue to study Cambridge Global Perspectives at Upper Secondary. For more information, see here.

The art, digital literacy, music and physical education have a smooth transition from the Primary programme. The art curriculum continues to include the same learning objectives as primary cross Stages 7 to 9. The digital literacy curriculum emphasises that staying safe is an important aspect of all digital activity. Learners develop online skills that enable them to protect themselves and their devices, and to demonstrate concern and respect for others. The music curriculum allows learners to experiment with a wide variety of possible musical paths. This will help each learner to develop a personal affinity to music as well as find ways to express their unique musical personality. The physical education curriculum develops a wide variety of age-appropriate physical activities, including games, team sports, gymnastics and dance. Through these activities learners develop a foundation of an active and healthy lifestyle for life.

Cambridge Lower secondary testing:

Cambridge Progression Tests and Cambridge Lower Secondary Checkpoint allow schools using Cambridge Lower Secondary to monitor their learners' progress and attainment against an international benchmark.

Cambridge Lower Secondary Progression Tests are available as paper or onscreen tests which can be taken when a class has completed a stage of the curriculum framework. Once the tests are marked (by teachers, with some auto-marking for the onscreen version) the unique analysis tools provided by Cambridge will use the results to provide detailed reports. These highlight the strengths and weaknesses of learners so teachers can make targeted improvements to teaching and learning. Learners' results can be compared against their class, school or other schools around the world, and on a year-by-year basis.

Lower Secondary Checkpoint is for learners who have completed the Cambridge Lower Secondary curricula. It provides evidence of readiness for the next stage of education, assessing skills, knowledge and understanding. English, English as a second language, mathematics and science are all assessed through written tests provided and marked by Cambridge. Cambridge Lower Secondary Global Perspectives is assessed through an individual Research Report which is marked by teachers and moderated by Cambridge. For more information see here.

2.4 Cambridge Upper Secondary

The Cambridge Upper Secondary programme has an extensive range of subjects available at Cambridge IGCSE or Cambridge O Level. This diverse range allows teachers to design either a broad and balanced curriculum, or a more specialised one, depending on their educational aims. Some schools opt for a specialised programme with a number of compulsory subjects (including English language, mathematics and science) and only a few, if any, learner electives. Others give learners more choice. It is recommended that learners are offered some choice, to allow them to follow their interests and talents, but there may be higher costs for staff, and perhaps specialist rooms and equipment, as more subjects are offered.

What is a Cambridge IGCSE?

IGCSE stands for International General Certificate of Secondary Education. Over 70 subjects are available. Schools can offer almost any combination of subjects and each subject is certificated separately.

- A Cambridge IGCSE is the formal recognition of a learner's achievement at the end of a particular subject course. The content of the course is based on

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an international curriculum developed for 14–16 year olds (although it can be studied by younger or older learners).

- The content of each course is created to suit a wide variety of schools and to avoid cultural bias. It helps to develop creative thinking, enquiry and problem-solving skills and supports the development of the Cambridge learner attributes.
- Each qualification is made up of a number of assessments (called components), the majority of which take place at the end of the course. The methods of assessment include written papers, orals, coursework and practicals.
- Learners have to pass a particular combination of these assessments to achieve the qualification. Some syllabuses offer learners and teachers different assessment options through which to achieve the qualification. This broadens opportunities for students to demonstrate their learning, particularly when their first language is not English.
- In the UK, Cambridge IGCSE is accepted as an equivalent to the GCSE.
- The Cambridge IGCSE grades awarded are A*–G, with A* being the highest. They are designed to cover a wide ability range. Cambridge IGCSE is also available graded 9–1 in certain subjects and administrative zones – grade 7 is aligned to grade A and grade 4 is aligned to grade C.

The main differences between Cambridge IGCSE and qualifications offered by other providers as well as UK GCSEs, are in the syllabus content and methods of assessment:

- Several Cambridge IGCSE subjects have an optional coursework element, whereas with most GCSE and equivalent qualifications offered by other providers, coursework is not an option and where there is coursework, it is compulsory.
- The content of Cambridge IGCSE subjects is tailored to the multicultural, multilingual audience they serve, in a way the GCSE content or the content of IGCSEs offered by other providers is not.
- All UK GCSEs from 2019 will be graded 9-1, where IGCSEs are offered as A*-G. For some zones and subjects, IGCSEs are also available graded 9-1.
- Cambridge provides time-zone variation of papers for its IGCSEs. This ensures that students who sit examinations before others cannot compromise the security of the examinations while examinations are timetabled at sensible local times.

What is a Cambridge O Level?

O Level stands for Ordinary Level, and is an internationally recognised qualification equivalent to the UK General Certificate of Secondary Education (GCSE) and Cambridge IGCSE. Over 40 subjects are available to schools, except those in administrative zones 1, 2 and 6.

- A Cambridge O Level is the formal recognition of a learner's achievement at the end of a particular subject course. The content of the course is based on an international curriculum developed for 14–16 year olds (although it can be studied by younger or older learners).
- The qualifications were developed from the academically focused O Level introduced in the UK in the 1950s and replaced in 1988 in the UK by the GCSE.
- The content of each Cambridge O Level syllabus is designed especially for an international market, and is sensitive to the needs of different countries. In many instances, IGCSEs and O Levels share the same content, have common assessments and share common assessment standards.
- Each qualification is made up of a number of assessments (called components), the majority of which take place at the end of the course. The methods of assessment include written papers, orals and practicals, and for some subjects, coursework.
- Learners have to pass a particular combination of these assessments to achieve the qualification. Some of the syllabuses offer learners and teachers different assessment options to achieve the qualification. This broadens opportunities for students to demonstrate their learning, particularly when their first language is not English.

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- In the UK, Cambridge O Level is accepted as an equivalent to the GCSE.
- Cambridge O Level assessment standards are aligned to those of the Cambridge IGCSE, and are equivalent on a subject-for-subject, grade-for-grade basis. The grades awarded are A* to E, with A* being the highest.

The main difference between Cambridge O Level and GCSE and Cambridge IGCSE is the grade range: O Levels are graded on an A*–E scale, whereas Cambridge IGCSEs are on an A*–G scale (and 9–1 grade scale for certain subjects and administrative zones). O Levels, therefore, do not provide as many grades recording student performance at lower levels of attainment. The grades are consistent so an A* or C grade in either represents the same level of performance and both IGCSE and O Level provide an excellent preparation for students going onto Cambridge Advanced.

Syllabus content and assessments are often shared for Cambridge O Level and Cambridge IGCSE, although in several subjects the assessment model at Cambridge IGCSE additionally includes coursework options.

Science specifics

In Cambridge Lower Secondary, the curriculum is called 'science' but in Cambridge Upper Secondary there are important choices to make. Schools may choose to offer biology, chemistry and physics as separate subjects. In this case, learners can take all three or specialise in one or two of them. These 'separate sciences' have the greatest amount of content and offer the very best preparation for Cambridge Advanced science. Separate sciences are available at both Cambridge IGCSE and Cambridge O Level and are extremely popular with schools. At IGCSE level, Co-ordinated Science is also offered. This has two-thirds of the content of each of the separate sciences and is known as a double award, meaning that it is worth two IGCSEs. This still offers good preparation for Cambridge Advanced science and many learners will progress to taking one or more sciences after IGCSE through this route. Some schools offer Co-ordinated Science as the only science option. At both IGCSE and O Level, Combined Science is also offered. This has one third of the content of each of the separate sciences. It is a good choice for learners who need to complete their general science education at this level but do not plan to take sciences further.

> "Schools know their own students best. Streaming them into either the core pathway or the core and extended pathway will clearly impact their future options."

'Core' and 'supplement' tiering

Cambridge IGCSE science subjects, mathematics and English as a second language offer two curriculum options. These are referred to as 'core' and 'extended' or 'supplement' curriculum options. Everyone entering for the subject has to complete the core curriculum, but the extended curriculum can be studied in addition. Students who complete core and extended will be assessed on the full A* - G scale. Students who complete the core can attain grades in the range of C to G.

The extended curriculum provides an opportunity to study the subject in more depth and experience wider coverage of the content. The use of tiering means that questions are set at appropriate levels of demand for the ability range of students taking the tier. Strong candidates can access more demanding material that will prepare them better for studying the discipline at a higher level, including AS or A Level. The extended material, however, can prove to be too cognitively demanding for weaker students while the core is designed to provide a well-rounded education accessible by all. Use of tiering supports a positive assessment experience for all students, to allow everyone to demonstrate what they know, understand and can do.

A school may decide that all learners will study the extended as well as the core, and schools are encouraged to ensure all students are appropriately challenged. Schools know their own students best. Streaming them into either the core pathway or the core and extended pathway will clearly impact their future options. Some students may be struggling because of gaps in their previous teaching, so providing extra support may make it possible for them to access the extended material. The option to enter some candidates for the core examination papers remains until the entry deadline so the decision does not have to be made when the course is first taught.

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Alternative course options in IGCSE

Apart from English language, there are several other Cambridge Upper Secondary subjects that have alternative courses (detailed at the end of this guide in the appendices). This flexibility helps teachers identify and select specific courses to meet their teaching requirements.

Some alternative subject courses have particular restrictions ('barred combinations') when it comes to the exams. For example, learners cannot take Cambridge IGCSE Mathematics and Cambridge IGCSE International Mathematics in the same exam series. These restrictions do not mean it is not possible to offer both courses; only that learners cannot undertake the exams or associated assessments of the barred combinations in the same exam series.



Length of study and number of courses

Learners usually study Cambridge IGCSE and Cambridge O Level over one or two years and a few schools offer IGCSE over three years (see section 2.8 on fitting the Cambridge pathway to years of schooling). In many schools, learners study eight or nine subjects, and occasionally more, over a period of two years. In others, learners study a reduced number of subjects, typically about five or six, over one year. Reducing the Cambridge Upper Secondary programme to a one-year period has a direct influence on the balance of the curriculum, as the curriculum will be narrower for any individual learner studying fewer subjects. Some schools allow very able learners to study for exams in selected subjects a year early.

2.5 Cambridge Advanced

By the time learners begin studying the Cambridge Advanced programme, they often want to specialise more, depending on their current interests, ambitions for higher learning and potential career paths. However, it is still possible to study a wide range of different subjects at this level, creating a broad programme of study, and the co-curricular programme can add breadth and balance to the educational experience.

'Planning a Cambridge International AS & A Level Programme' below sets out some different approaches and gives detailed guidance on how teachers can use the programme flexibly to suit their needs. However, in most Cambridge schools it is typical for learners to study three or four subjects. Working at a more advanced level they will need more curriculum time in class for each subject as well as more independent study time. Teachers may decide to include this independent study time on the learner's timetable but it should not normally need teacher time.

What are Cambridge International AS & A Level?

A Level stands for Advanced Level and AS Level stands for Advanced Subsidiary Level. An AS Level contains half the content of the corresponding A Level and is normally completed in one year. This allows for flexibility, as learners can complete AS Levels as qualifications in their own right or as the first half of an A Level, for which they are allowed to carry forward their AS result. Some learners

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take all the assessments for their full A Level at the end of the second year (see the 'Planning a Cambridge International AS & A Level programme' below).

Cambridge International AS & A Level are the names of the qualifications that formally recognise a learner's achievement at the end of a particular subject course. The content of the course is more in-depth and demanding than Cambridge IGCSE or O Level. It is based on an international curriculum developed for 16–19 year olds preparing for higher education.

The assessment standards of Cambridge International A Levels are aligned to those of UK A Levels and are equivalent on a subject-for-subject, grade-for-grade basis. The grades awarded are A* to E, with A* being the highest. There is no A* grading in the certification of Cambridge International AS Levels. Cambridge International A & AS Levels are viewed as equivalent to AS & A Level qualifications taken by learners in the UK.

The main differences between Cambridge International AS & A Level qualifications and the UK AS & A Level qualifications are in the syllabus content and mode of assessment:

- Cambridge offers a staged approach no longer available in the UK. For most subjects, the Cambridge AS Level can either be taken as an end-point qualification in its own right, normally after one year of study, or AS Level components can contribute directly to the A Level in a linear examination normally taken at the end of two years along with the other A Level components. Candidates can also build on their AS Level results to count into their A Level result. Cambridge has preserved the staged approach because of the flexibility it provides. In most parts of the world, the AS Level standard represents the level required for direct university entry. Many universities also like to use AS Level results as evidence of student attainment in their admissions process.
- The context or examples used in Cambridge AS and A Level syllabuses and assessments are designed to be culturally sensitive and to provide an international context.
- There is a wider range of subjects available at Cambridge International AS and A Level, for example the wide range of languages offered.
- Cambridge provides time-zone variation of papers for AS and A Level. This ensures that students who sit examinations before others cannot compromise the security of the examinations while examinations are timetabled at sensible local times.

Planning a Cambridge International AS & A Level programme

There are three different approaches for planning and scheduling Cambridge International A Level (see table 3 on next page). Each approach will have a different effect on the structure of the school curriculum and the school timetable.

Before schools decide on which of the three approaches they might allow, it is important for them to check the requirements of universities and other higher education institutions where their learners are likely to want to go. Universities in some countries require three full A Levels for their most popular courses – Approaches 1 or 2 could work for these. Approach 3, AS only, has the potential to provide the broadest and most balanced curriculum but the compromise is less specialisation. This may however be ideal in countries where AS Levels are accepted on their own.

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Table 3: Cambridge International AS and A Level options

Approach 1	Approach 2	Approach 3
A 'non-staged' assessment route. Learners take all papers of the Cambridge International A Level course in the same examination series, usually at the end of the second year of study.	A 'staged' assessment route. Learners take the Cambridge International AS Level in Year 1 and/or Year 2 and complete the final Cambridge International A Level in the second series.	Cambridge International AS Level only. Learners take the Cambridge International AS Level exams only. The syllabus content for Cambridge International AS Level is half of a Cambridge International A Level programme.
A learner who successfully completes the non-stage option will normally have studied three or four Cambridge International A Level courses.	A learner who successfully completes the staged assessment option might have outcomes that include: • three Cambridge international A Levels and one AS Level (first example below) • two Cambridge International A Levels and Four AS Levels (second example below) • three Cambridge International A Levels and two AS Levels (third example below).	A learner who successfully completes the Cambridge Internaitonal AS Level only assessment option might have studied eight Cambridge International AS Level courses, completing four in each year. This could represent a broad and balanced curriculum but with less specialisation and depth.

In the first example below, the learner has selected a programme that will result in three Cambridge International A Levels in History, Geography and French and one AS Level in Global Perspectives & Research.

Curriculum level	Subjects selected for study			
First year	AS Level Global Perspectives	AS Level History	AS Level Geography	AS Level French
Second year		A Level History	A Level Geography	A Level French

In the second example on the next page the learner has selected a programme that will result in two Cambridge International A Levels in Mathematics and Economics. They have broadened their programme by selecting an additional two AS Level subjects in the final year. Together with their first year AS Level subjects, they will achieve four Cambridge International AS Level qualifications: English Literature, Biology, Art and Design and Global Perspectives & Research.

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Curriculum level	Subjects selected for study			
First year	AS Level Literature - English	AS Level Mathematics	AS Level Biology	AS Level Economics
Second year	AS Level Art & Design	A Level Mathematics	AS Level Global Perspectives	A Level Economics

In the third example below, the learner has selected a more specialised programme, resulting in three Cambridge International A Levels supported by two Cambridge International AS Level awards. In this case, Cambridge International AS Level Business reinforces the mathematics–economics combination, with a possible career in the financial world in mind. On the other hand, this could be criticised as being over-specialised, and it might be preferable for the learner to select a different sort of discipline, for example art or Global Perspectives.

Curriculum level	Subjects selected for study			
First year	AS Level Literature - English	AS Level Mathematics	AS Level Biology	AS Level Economics
Second year	A Level Literature – English	A Level Mathematics	AS Level Business	A Level Economics

Learners need guidance to ensure their intended course of study provides the learning and qualifications they need, either for admission into higher level studies or for pursuing a particular career. As mentioned, it is very important to consider admission requirements for both national and international universities and other higher learning institutions, when constructing curriculum and qualification pathways and guiding learners on subjects to choose.

What is Cambridge Pre-U?

Cambridge Pre-U is a qualification designed by Cambridge to help schools equip learners with the skills they need to succeed at university. The qualification formally recognises a learner's achievement at the end of a particular subject course. It is based on a curriculum that promotes deep understanding of subjects through specialisation.

Learners can take Cambridge Pre-U qualifications separately, and receive grades for each one, or choose three Principal Subjects to achieve the Cambridge Pre-U Diploma. To achieve the Diploma, they also need to complete Global Perspectives & Research, a qualification that gives learners the chance to develop independent thinking, research and communication skills.

- Cambridge Pre-U Principal Subjects are assessed at the end of the two-year course.
- Cambridge Pre-U Principal Subjects are recognised by UK universities as equivalent to A Levels.
- Cambridge Pre-U qualifications have an extended grade range at the top to recognise outstanding achievement. The grades awarded are reported on a nine-grade scale, reflecting three broad bands of achievement: Distinction, Merit and Pass. Each band is sub-divided into three grades: Distinction 1, 2, 3 (D1, D2, D3), Merit 1, 2, 3 (M1, M2, M3) and Pass 1, 2, 3 (P1, P2, P3). Each subject a learner takes at Cambridge Pre-U receives a separate grade, for example, D3.

Cambridge Pre-U is not time-zoned and schools outside the UK need special approval before they offer it. Schools considering offering Cambridge Pre-U outside the UK should contact Cambridge at **info@cambridgeinternational.org**

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2.6 Alternative approaches to English language development and demonstrating English language proficiency

Cambridge International offers English as a school subject, with pathways designed for first language, bilingual learners and learners who have English as a second language. Our sister organisation, Cambridge Assessment English (Cambridge English, part of Cambridge Assessment), also offers a range of English language qualifications that are widely accepted by universities, governments and employers around the world.

Both Cambridge International English as a second language and Cambridge English qualifications reference language attainment against The Common European Framework of Reference for Languages (CEFR), a widely used international standard for describing language ability. CEFR describes language ability on a six-point scale, from A1 for beginners, up to C2 for those who have mastered a language. This makes it easy for anyone involved in language teaching and testing, such as teachers or learners, to see the level of different qualifications. It also means that employers and educational institutions can easily compare Cambridge International and Cambridge English language qualifications to other exams in their country.

Cambridge International English as a Second Language is designed primarily for schools where part or all of the curriculum [not just English] is taught through the medium of English. English as a second language is available as one of the subject choices at each stage of the Cambridge Pathway from Primary to Upper Secondary. Schools receive a syllabus, support and assessment materials that are consistent with all Cambridge International courses and reporting and assessment approaches are also consistent so English as a second language fits in seamlessly with the rest of the Cambridge International curriculum.

Cambridge International English as a second language programmes

Cambridge International offers a progressive set of learning objectives designed to prepare learners to become skilled users of English as a second language through the Primary and Lower Secondary programmes. The learning objectives are organised into five strands, which together support the development of knowledge, skills and understanding. The *Use of English* strand articulates the linguistic features learners need to be able to understand and use when engaging with the language productively and receptively in the *Reading, Writing, Speaking* and *Listening* strands. By identifying aspects of the curriculum which are reflected in the CEFR text and level descriptors, guidance is provided as to how the curriculum aligns to the CEFR levels. This is where appropriate, as some learning objectives are not addressed by the CEFR but considered important for supporting language learning at Primary and Lower Secondary level. The Cambridge Checkpoint tests at the end of Primary and Lower Secondary provide teachers and learners with feedback on their achievement in reading, writing, listening and use of English.

IGCSE English as a second language also aligns to CEFR but, as with primary and lower secondary, additional learning objectives considered important for a school curriculum at this stage are included. Cambridge IGCSE English as a Second Language (E2L) aims to develop communication skills in listening, speaking, reading and writing, enabling learners to become independent users of English, and to be able to use English to communicate effectively in a variety of practical contexts. Learners will be presented with a variety of stimuli that will build up their skills in reading and writing. They will learn to select relevant details, understand the difference between what is directly stated and implied, and practise writing for different purposes and audiences. They will listen to a range of spoken material, including talks and conversations, in order to develop listening skills. They will also engage in conversations on a variety of topics, and develop their skills in responding to different situations and audiences with a degree of accuracy and clarity.

Cambridge English Language programmes for schools

Cambridge English programmes are often most appropriate for contexts where English is the only subject being taught through the medium of English in the school and close CEFR alignment is considered a high priority. Its in-depth examinations are targeted at specific levels of the Common European Framework of Reference for Languages (CEFR), with clear progression pathways from one level to the next. Cambridge English qualifications encourage development of all four language skills. See here for more information.

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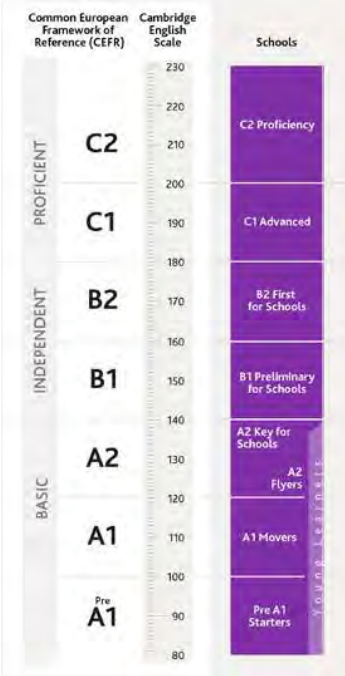
Figure 2: Cambridge Assessment English Language Assessments Programmes for Schools



Meeting University English language admission requirements

For learners planning to gain entry into universities in English-speaking countries, the English language component of their learning programme is really important. Universities set their own admission criteria for courses and these are usually available on their websites. In order to demonstrate English language proficiency for degree courses, some universities will accept a good grade in IGCSE English as a second language, others require IGCSE First Language English. In the United Kingdom, for example, some universities require a Secure English Language Test [SELT], such as the International English Language Testing System (IELTS) assessed by Cambridge English. There is more information on English language university admissions requirements here.

2.7 Timetabling the curriculum

Although it is important to start the curriculum planning process by designing a school curriculum that delivers the school's mission, schools will also need to consider practical timetabling issues. These are largely determined by school context, local laws and practices, and the scale of the school budget to support resourcing. This section aims to briefly consider some of these.

The school context, vision and educational aims will influence a number of timetabling decisions including:

- the length of the school day, the number of days' schooling a week and the length of the school year
- how much flexibility is built into the curriculum to allow learners to select options and, where applicable, options within subjects
- the extent and nature of co-curricular activities and expectations or requirements for learner participation in these
- the inclusion of any additional courses or programmes that do not end in some form of external assessment, such as religious education, values education, cultural or heritage courses, student leadership and career experience programmes, and decisions about whether or not these are compulsory
- whether multi-levelling is introduced so that learners in different year groups can be scheduled in the same class depending on their needs
- whether there will be setting by ability within a year group in some subjects such as mathematics, so that several parallel classes are run in the same timetable slots

The timetable has to be developed within the resource constraints of the school. These constraints include:

- number of teaching and support staff
- staff contracts stipulating conditions and expectations
- subject expertise and experience of teaching staff

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- availability of classrooms and specialist rooms – for example, science laboratories and technology rooms
- availability of resources for language support, special educational needs and gifted learning programmes

When constructing the timetable, curriculum planners must decide how much teaching time to allocate to each subject. This can be expressed in hours per week, but because schools operate different annual calendars, it is often better calculated as hours per year. This equates to the number of periods per week multiplied by the duration of these allocated periods and the number of weeks in the school year. Some schools operate timetables on a 10-day (two-weekly) cycle or some other system of rotation, for example an eight-day cycle. This can create flexibility. Most schools use a regular weekly cycle.

Table 4: Factors influencing timetable decisions

Internal influences	External influences
Organisation structure	Cambridge programme requirements
Resources including staff and facilities	Cambridge qualification requirements
Compulsory subjects or options (degree of learner choice)	Recommended hours a week for each subject
English language capability of learners	National curriculum and qualification requirements
Multi-levelling or fixed school years	External agency requirements, for example, ministry of education
Co-curriculum. Addiitonal courses and activities outside core curriculum	University admissions criteria
Employment contracts	Requirement to take exams in English
	Core vs supplementary subject options

The guided learning hours recommended for Cambridge International programmes are shown opposite.

Table 5: Recommended guided learning hours

Programme	Subject suggested teaching hours
Cambridge Primary	**Art & design** 30 hours per year (about 1 hour per week) **Computing** 22–45 hours per year (about 0.5 – 1.5 hours per week) **Digital literacy** 30 hours per year (about 1 hour per week) **English** 120–150 hours per year (about 4–5 hours per week) **English as second language** 120–150 hours per year (about 4–5 hours per week) **Global Perspectives** Refer to page 15 of the Teacher Guide as teaching time is dependent on the context and how it is implemented at each school **Mathematics** 120–150 hours per year (about 4–5 hours per week) **Music** 30 hours per year (about 1 hour per week) **Physical education** 60–90 hours per year (about 2–3 hours per week) **Science** 45–60 hours per year (about 1.5–2.5 hours per week)
Cambridge Lower Secondary	**Art & design** 45 hours per year (about 1.5 hours per week) **Computing** 45 hours per year (about 1.5 hours per week) **Digital literacy** 30 hours per year (about 1 hour per week) **English** 120–150 hours per year (about 4–5 hours per week) **English as second language** 120–150 hours per year (about 4–5 hours per week) **Global Perspectives** Refer to page 15 of the teacher guide as teaching time is dependent on the context and how it is implemented at each school **Mathematics** 120–150 hours per year (about 4–5 hours per week) **Music** 45 hours per year (about 1.5 hours per week) **Physical education** 60–90 hours per year (about 2–3 hours per week) **Science** 90 hours per year (about 3 hours per week)
Cambridge Upper Secondary	About 130* hours per Cambridge IGCSE or O Level subject before taking the assessments.
Cambridge Advanced	• Staged option 180* hours per Cambridge AS Level subject, further 180 hours per subject to complete the Cambridge A Level. • Non-staged option 360* hours per Cambridge A Level, normally spread over two years.

** Includes teaching time and directed study. Does not include the independent study the learner is expected to carry out. It is recommend that learners are given opportunities for independent study outside of normal timetabled lessons for Cambridge Upper Secondary and Cambridge Advanced courses.*

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There are many models for constructing a timetable. However, timetabling should take into account not only providing a schedule of lessons for particular learners in a year group, but also the practical considerations of having the right staff and the right rooms and facilities available for them to take place. The following simplified example is based on practice in one Cambridge school and is intended to illustrate one approach. Detailed consideration of different timetable options is beyond the scope of this guide.

Table 6: Example of school timetable

Period	Time of day	Year 8 class	Year 12 class
1	8:00–8:40	English	Art Business Studies IT
2	8:40–9:20	Arabic	
Break			
3	09:40–10:20	Religious Studies	Mathematics
4	10:20–11:00	Mathematics	
5	11:00–11:40	Science	English
6	11:40–12:20		
Lunch			
7	13:00–13:40	Physical Education	Chemistry/History/Geography
8	13:40–14:20		Second Language (French, Mandarin, Spanish)
9	14:20–15:00	Geography	

In this timetable, the day is divided into nine teaching periods of 40 minutes. For the Year 8 level (typically 12–13 year olds studying a blend of Cambridge Upper Secondary and the school's own curriculum) most periods are single periods of 40 minutes in length. Periods can be combined to form double periods which allow an extended amount of time for particular subjects or activities. For example, the double period for science gives the time needed to carry out practical experiments, and for physical education it includes the time needed for changing.

In Year 12, (typically 16–17 year olds studying for Cambridge AS Levels) subjects are mostly scheduled with double periods, providing 80 minutes for each lesson. Each subject has equal amounts of allocated teaching time, with three double periods and one single period throughout the week, equating to four hours and 40 minutes per subject per week. Because of the greater degree of specialisation at this level, it is possible for the school to schedule subjects to be taught at the same time (for example chemistry, history and geography in the example given above) if no learners want to study more than one of the combinations of subjects timetabled together.

Some schools have longer school days for older learners so that more time is available. This could be every school day or specific days. Extending the day to accommodate the curriculum is a way of increasing the amount of teaching time for subjects, or increasing the number of subjects on offer. Depending on a learner's choice of subjects, they may have study periods allocated in the school day to work on projects or to study in the library. This is consistent with the aim of creating independent and responsible learners but will also depend on the school's ability to provide the facilities learners need and the school's attitude to learners' time management.

The length of timetabled periods can have an impact on the types of pedagogy used in the classroom. Teachers will often adapt their teaching style and the types of activities they create to fit the available lesson duration. There is a tendency for shorter periods to become dominated by whole class instruction. Longer lessons can become wasteful if teachers have not planned and prepared enough work to fill the entire lesson. The school's quality assurance programme

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should ensure that teachers have the right amount of time for engaging and effective lessons. Ideally, there should be enough time for the teacher to run several different activities which collectively fulfil the prescribed requirements of the syllabus or curriculum.

2.8 Teaching Cambridge Programmes in school systems with different requirements for the formal years of schooling

The Cambridge pathway has 13 stages and typically, a stage is covered in one year. However, in some countries, schools teach Cambridge stages in shorter or longer time periods, due to differences in the number of formal schooling years. Schools can also choose to teach some Cambridge programmes over different lengths than those most commonly adopted to meet local needs. Cambridge programmes are designed to be flexible and the following examples illustrate how some schools or regions adapt the Cambridge pathway to suit their own circumstances and needs:

Case Study 1:

The Cambridge continuum in 12 years: the experience in Southern Africa

Countries in Southern Africa typically have 12 rather than 13 years of formal schooling. Students start school aged 6 years old in grade 1. Secondary school usually starts at grade 8, when students are 13 years old. Some schools choose to base their school curriculum around Cambridge while others offer Cambridge alongside the national curriculum. In primary and lower secondary it is the norm for Cambridge to be used to complement national curriculum requirements or the school's own curriculum offer. In the IGCSE and A level years some schools choose to use Cambridge as an alternative to the national curriculum while others allow students to complete both providing extra lessons and support for Cambridge preparation.

Most Cambridge schools teach IGCSE over two years in grade 10 and 11 and sit final IGCSE assessments when students on average are 16 years old, while a few schools offer IGCSE over 18 months. Typically, students go on to do Cambridge

Case Study 1 *continued*

AS Level qualifications in the final year of school (grade 12). In some countries, IGCSE is considered the equivalent of the local school leaving certificate and schools teach up to this level. In others, AS Level is accepted as the equivalent to matriculation and the entry standard required for universities. A few schools also offer a post matriculation year grade 13 for students to do the full A Level programme (AS plus A2).

Some schools choose to accelerate Cambridge. This usually involves starting secondary school one year early at grade 7. Students complete Lower Secondary in grade 7 and 8, completing Cambridge Secondary 1 Checkpoint assessments at the end of grade 8 before moving to IGCSE which is taught in grades 9 and 10. Students then go on to do the A Level over two years. Students then have time to do AS Levels over two years (which also might also include resitting some IGCSEs). For students aspiring to the full A Level [AS and A2] they can do the staged AS to A2 route or the full A Level over two years and still graduate in grade 12. Completing the full A Level will help students who want to go to competitive universities overseas and also provides additional points strengthening their application to universities in southern Africa.

A few schools offer very flexible pathways at the secondary level. Students who perform particularly well are allowed to take IGCSE courses over one year, usually in subjects they plan to take through to the full A Level. In a few cases, students can take IGCSEs over three years. This degree of flexibility requires a timetable built around individual student needs and strengths and which can be challenging for schools.

Case Study 2:

The Cambridge Pathway in 12 years: Case study example of Saudi Arabia and Bahrain

Schools in Saudi Arabia and in Bahrain deliver a 12 year programme from the age of 6 to 18. It is not permitted to begin Grade 1 at the age of 5, nor can a school be licensed to deliver a 13 year programme ending at the age of 19. This leaves schools with the challenge of delivering the 13 year Cambridge Pathway in 12 years.

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Case Study 2 *continued*

Figure 3 (below) shows three different ways that schools structure the Cambridge Pathway from Primary to Advanced.

In all structures, candidates sit for Cambridge IGCSE, Cambridge International AS & A Level at the same age and Grade or Year; IGCSE – Grade 10 (Year 11 in the UK), AS – Grade 11 (Year 12 in the UK), A Level – Grade 12 (Year 13 in the UK).

Age of compulsory education in the Middle East

Year of external asssessment

Figure 3: Three different structures used for teaching the Cambridge Pathway.

Structure 1*

Age	Cambridge Stage	Year/Grade in KSA
5-6	Cambridge Primary (1)	KG2
6-7	Cambridge Primary (2)	1
7-8	Cambridge Primary (3)	2
8-9	Cambridge Primary (4)	3
9-10	Cambridge Primary (5)	4
10-11	Cambridge Primary (6) (Cambridge Primary Checkpoint)	5
11-12	Cambridge Lower Secondary (7)	6
12-13	Cambridge Lower Secondary (8)	7
13-14	Cambridge Lower Secondary (9) (Cambridge Lower Secondary Checkpoint)	8
14-15	Cambridge IGCSE Year 1 (10)	9
15-16	Cambridge IGCSE Year 2 (11)	10
16-17	Cambridge International AS & A Level Year 1 (12)	11
17-18	Cambridge International AS & A Level Year 2 (13)	12

Structure 2

Age	Cambridge Stage	Year/Grade in KSA
6-7	Cambridge Primary (1)	1
7-8	Cambridge Primary (2)	2
8-9	Cambridge Primary (3)	3
9-10	Cambridge Primary (4)	4
10-11	Cambridge Primary (5+6)* (Cambridge Primary Checkpoint)	5
11-12	Cambridge Lower Secondary (7)	6
12-13	Cambridge Lower Secondary (8)	7
13-14	Cambridge Lower Secondary (9) (Cambridge Lower Secondary Checkpoint)	8
14-15	Cambridge IGCSE Year 1 (10)	9
15-16	Cambridge IGCSE Year 2 (11)	10
16-17	Cambridge International AS & A Level Year 1 (12)	11
17-18	Cambridge International AS & A Level Year 2 (13)	12

** See Structure 2 information on the next page*

Structure 3

Age	Cambridge Stage	Year/Grade in KSA
6-7	Cambridge Primary (1)	1
7-8	Cambridge Primary (2)	2
8-9	Cambridge Primary (3)	3
9-10	Cambridge Primary (4)	4
10-11	Cambridge Primary (5)	5
11-12	Cambridge Primary (6) (Cambridge Primary Checkpoint)	6
12-13	Cambridge Lower Secondary (7+8)**	7
13-14	Cambridge Lower Secondary (9) (Cambridge Lower Secondary Checkpoint)	8
14-15	Cambridge IGCSE Year 1 (10)	9
15-16	Cambridge IGCSE Year 2 (11)	10
16-17	Cambridge International AS & A Level Year 1 (12)	11
17-18	Cambridge International AS & A Level Year 2 (13)	12

*** See Structure 3 information on the next page*

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Case Study 2 *continued*

In **Structure 1**, schools begin delivering Cambridge Primary in the equivalent of reception i.e. KG2 (the second year of Kindergarten), and begin Cambridge Primary stage 2 in Grade 1 at the age of 6. Although this structure is designed according to Cambridge's recommended age guidelines, it is challenging to implement. The main challenge is that most new enrolments at Grade 1 (which usually accounts for over 50% of students) are from children that had no prior formal education experience, making stage 2 of the Cambridge Primary programme a challenge to teach. By using this structure, candidates sit for the Cambridge Primary Checkpoint in Grade 5 (equivalent to Year 6 in the UK) and Lower Secondary Checkpoint in Grade 8 (equivalent to Year 9 in the UK).

In **Structure 2**, schools begin delivering Cambridge Primary in Grade 1 (equivalent to Year 2 in the UK), and compress the Cambridge Primary Programme into 5 years. This is typically done by covering Stage 4 and 50% of Stage 5 of the Cambridge Primary curriculum in Grade 4, and covering the remaining 50% of Stage 5 and Stage 6 in Grade 5. By using this structure, candidates sit for the Cambridge Primary Checkpoint in Grade 5 (equivalent to Year 6 in the UK) and Lower Secondary Checkpoint in Grade 8 (equivalent to Year 9 in the UK).

Structure 3 is the most common way the Cambridge Pathway is delivered. Schools begin delivering Cambridge Primary in Grade 1, and teach the six stages in six years. This way, any new students joining the school during primary, don't face the challenge of having to cover more content in a shorter period. They then compress Cambridge Lower Secondary by teaching the three stages of the curriculum in two years. They achieve this by delivering Stage 7 and 50% of Stage 8 in Grade 7, and the remaining 50% of Stage 8 together with Stage 9 in Grade 8 (as shown in Table 7).

Table 7 compression stages 7-9 into two years

Stage 7	Stage 8	Stage 9
Grade 7	Grade 8	

Case Study 2 *continued*

Example of Structure 3

A school in Bahrain covers the content of all three stages effectively in approximately 64 teaching weeks (32 in Grade 7, 32 in Grade 8) by delivering 9 periods a week for science (chemistry x 3, biology x 3, physics x 3), eight periods a week for English, and eight periods a week for mathematics (each period is 45 minutes). This school has found the planning templates Cambridge provides as an effective tool to support planning the delivery of these three stages – in particular the long-term planning templates with learning objectives. The cumulative grade distribution at IGCSE for School A is higher than the country's average – an indication that this structure has worked effectively for their students.

Case Study 3:

Covering the Cambridge Primary programme in five years at HLC International School, Karanai, India

HLC serves students aged 2.5 to 18 years old (from Kindergarten to pre-university). It bases its curriculum around the Cambridge Pathway, offering Primary and Secondary Checkpoints, IGCSE, AS and A Levels. The school strongly emphasises and supports inclusion and diversity and strives to develop the whole person through five initiatives. Supporting inclusion and diversity [Elina]; Differentiated instruction based on evidence [Kognify]; Global citizenship [Karthauyam]; collaboration and sport [Explorers]; and community learning [Militvaa]. The school was one of the first Ashoka Changemaker schools in the world.

One challenge the school faces is that the school system in India is based on 12 rather than 13 years of schooling. In order to cover the six stages of Cambridge Primary in five years, the school has re-organised the stages - placing some a year earlier. Some stages are introduced in the final year of Kindergarten so that students are accelerated into the programme. Teachers have taken the Cambridge curriculum and carefully planned their schemes of work for each year with progression in mind. Expectations for progression for all students are high and students are supported through the Elina and Kognify initiatives.

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Case Study 4:

Teaching Cambridge IGCSE in One year at the RDFZ Chaoyang Branch School in Beijing

RDFZ Chaoyang Branch School (RDFZ CBS) is a secondary school. It is a branch of RDFZ, which is affiliated to Renmin University of China under the jurisdiction of the Ministry of Education. The school offers the best of Chinese education together with an international programme that complements the local requirements. In addition to the mandatory Chinese curriculum, RDFZ CBS provides a range of international courses, some compulsory, but many are voluntary. The school strives for academic excellence and the development of broader skills and competencies supporting the development of individual interests.

The main component of the Senior 1 programme (Year 10) are Cambridge IGCSEs. They are intensively taught over the course of nine months from September to May. All of the students are Chinese nationals so are second language English speakers. Students must study English, either English as a second language (or literature for the more able), mathematics and a science - they can choose from biology, chemistry, environmental management or physics). Students can then pick an additional three option subjects from a choice of: accounting, art & design, biology, business studies, chemistry, drama, economics, environmental management, ICT, music, or physics. Examination results are pleasing typically with 48% receiving A* or A.

The timetable is made up of 45, 40-minute periods in a week. All students do eight lessons of English and weaker students also do 5 lessons of extra English (taught by bilingual teachers). All other Cambridge IGCSE subjects are taught in five lessons per week. Students must also complete all compulsory elements of the Chinese curriculum. This includes Chinese language & literature, Chinese music, Chinese art, PE, Chinese history, geography, PE, political science and counselling. Students also have to do two extra-curricular activities after school on a Tuesday and a Thursday. They choose from over 100 activities which are offered by the staff.

Case Study 5:

A broad and balanced curriculum offer at the International School of Brunei

The International school of Brunei (ISB) is an inclusive and not-for-profit co-educational day and boarding school serving approximately 1,400 students aged 2-18 through the early years, primary and secondary sections. The student body comprises over forty different nationalities. The school emphasises academic success and the self-development of students through involvement in a wide range of sport, music, art, drama and outdoor education and is a non-selective school, with a wide range of abilities and aptitudes.

CLICK AND HOLD TO ENLARGE



The curriculum for students between the ages of 13 and 16 (years 9, 10 and 11 in the UK system) is designed around the IGCSE. A student's compulsory (core) curriculum requirement is made up of English, mathematics, coordinated science or two single sciences, and a language.

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Case Study 5 *continued*

To widen the curriculum offer, and create the flexibility that the ability range requires, the school starts vertical option blocks in Year 9. Under this system, options are chosen and these run for one year, with the recommended Cambridge time allocation. This creates a range of benefits: minority subjects run as choices across much bigger student totals comprising three year groups, international student movement is better accommodated through the one year cycle and the problem of subjects being over-subscribed is eradicated as the system is not a 'one-off'.

Furthermore, it greatly helps to create additional subject challenge for the higher ability Year 9 and 10 students outside the normal l examination cycle. In addition, due to the overall time savings (six hours per week), accrued through early IGCSE study, the school is able to offer a wider range of enrichment opportunities based on staff interest and expertise, which are scheduled on the main timetable and viewed as part of the formal curriculum and not as extra-curricular. These run after school and in lunchtimes.

In terms of student welfare, it could be argued that there is a benefit to spreading the examinations over three years, rather than confining them all to the end of Year 11. Through this system, students are able to study a broader and more balanced curriculum, allowing them more opportunity to explore areas of personal interest and develop a wider range of skills and understanding. Physical education and a school based course on 'essentials for learning and life' are also taken by all and are non-examinable. These are not shown in the diagram.

2.9 Curriculum models for bilingual and multilingual schools

Many schools find it ideal to use Cambridge programmes and qualifications for the English-medium (second-language) strand of a bilingual (or trilingual) education programme. They then use their own national curriculum and qualifications for the first-language strand of the programme.

There are many ways of organising bilingual education and the best approach will depend on the school vision and practical considerations, including resources, suitable teaching staff, environment and the exposure of learners to English language outside the school.

A bilingual/multilingual curriculum model is based on how many subjects are taught and learnt through each language and over how much time.

For example, some schools:

• begin in a small way by teaching one module or project in English	Short-term	Low intensity
• prepare learners by immersing them in English for a short period, e.g. through overseas student exchanges, or by teaching all curriculum subjects in English for one school term	Short-term	High intensity
• teach one or two content subjects in English over several years	Long-term	Low intensity
• teach a substantial part of the curriculum in English over several years	Long-term	High intensity

Fundamental to all these approaches is having teachers who are able to teach their content through the medium of English. Cambridge recommends content and language integrated learning (CLIL) as a methodology to support this process. This means teachers are supporting students in learning the language they need to achieve in their subjects. Schools will need a training strategy to allow local teachers to build up their second-language skills so they can teach their subject through the medium of English unless teachers are already well prepared.

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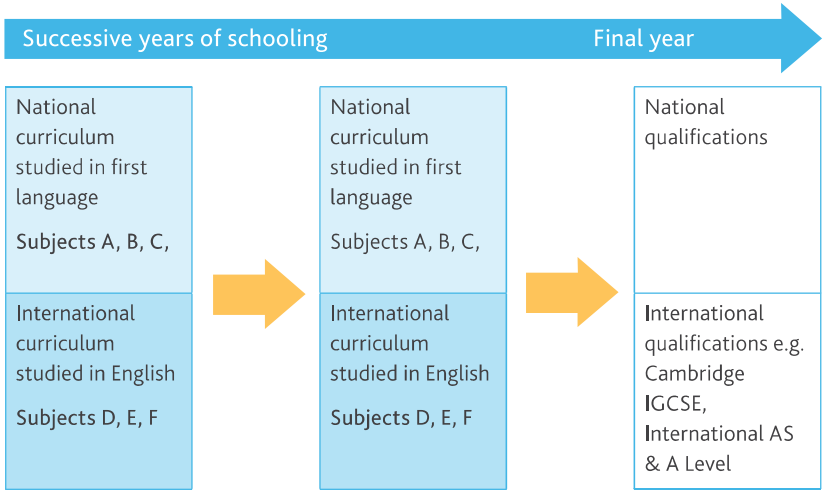
Bilingual education usually requires meeting the needs of two curricula – a national (or sometimes regional) curriculum and an international curriculum. How do schools organise the timetable?

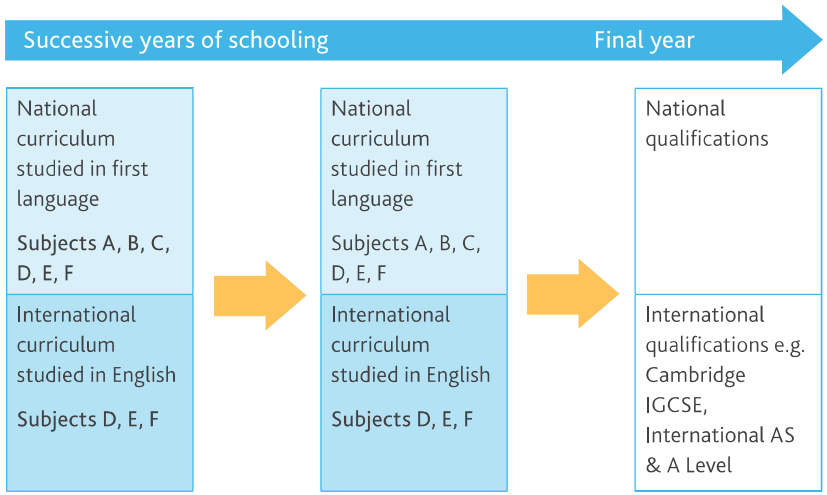
There are two key approaches.

Approach A: Split curriculum



In Approach A, learners study some subjects as part of the national curriculum and other subjects as part of an international curriculum. In this way the problem of double timetabling is avoided. This model is only possible if equal official recognition is given to the qualifications taken in both curricula.

Approach B: Shared subject currciulum



In Approach B, learners study some subjects in both the first language and English. This could allow learners to take both national qualifications and Cambridge qualifications. They study the remaining subjects in the first language. The common subjects (D E F) could be taught using:

1. **An integrated curriculum**. Teachers should first compare the national curriculum against the Cambridge curriculum for a subject. This will allow them to identify areas of overlap and difference and help them work out what they need to teach in total. Then they can teach the integrated curriculum:
   - **either** in the same class using one bilingual teacher or two team-teachers, one for each language/curriculum. In this way, the same teaching and learning can enable learners to take two qualifications – the national qualification in the first language and the Cambridge qualification in English.

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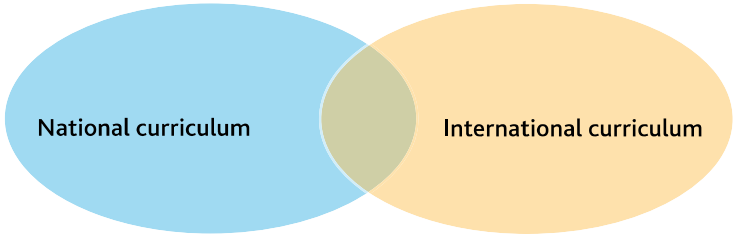
- or rotating classes/weeks/topics/terms/years between the first language and English. Sometimes the learning is rotated or sandwiched over several years. In this way, learning starts in the early years with the national curriculum through the first language, then switches for a period of years to the Cambridge curriculum, when this 'learning in English' period allows learners to work towards international qualifications, before returning to national curriculum priorities in the final years.

An integrated curriculum means that learning is streamlined for the benefit of the learner – the learner just goes to one timetabled class for a subject. However, this does require curriculum mapping, planning and teacher coordination.

2. **Two separate curricula.** The national and Cambridge curricula for a subject are covered in separate classes and languages, with no mapping of areas of overlap/difference.

If the curricula are separate, the learner is probably aware they are going to a national curriculum class and then to a separate Cambridge (e.g. IGCSE) class. Also, some of the learning may be duplicated. However, this may be easier for the school to organise if it is difficult to map the two curricula, if there is not enough overlap between curricula, or if there is a language barrier which prevents teachers coordinating to produce and teach a single, integrated curriculum.



Curriculum mapping for a subject
Curriculum mapping builds an intergrated, flexible sequence for learning by comparing two curricula and identifying common and different topics and skills



Learners in all Cambridge schools need to be able to complete their studies and undertake assessments in subjects through the medium of English. This can be challenging for learners with English as a second language, but there are educational advantages in supporting language development and bilingualism. Not only are learners better prepared for participation in the modern global world, bilingualism also helps support individual cognitive development.

Even if a school is not running a bilingual education programme, there are other ways of developing 'language awareness' in international English-medium schools in order to help support bilingualism or multilingualism. An effective language policy can help to achieve this. Cambridge is committed to supporting schools to develop and implement strategies successfully to support learners in multilingual settings. Cambridge ensures that assessments are fair to learners who do not have English as a first language.

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More information is available here.

Case Study 6:

Supporting the development of multi-lingualism and global perspectives in the Netherlands

A number of state schools in the Netherlands complement the national curriculum with Cambridge programmes, usingthe support of Nuffic. Nuffic is an independent, Dutch, not-for-profit organisation dedicated to supporting institutions in the Netherlands with educational and other programmes that foster international co-operation, awarness and language development. Two examples are the Christelijke Scholengemeenschap [CS] Vincent van Gogh in Assen and the Sintermeerten College, Heerlen.

CS Vinvent Van Gogh supports the development of critical thinking, global awareness and English proficiencey by requiring all students to complete Cambridge IGCSE and AS Level Global Perspectives and IGCSE English as a Second Language. Cambridge Global Perspectives is taught as a separate class and IGCSE English as a Second language is integrated into regular English lessons. Global Perspectives fits in particularly well with the international scope of the school's bilingual education, as well as nurturing important research skills and IGCSE English as a Second Language is an ideal way to show that students have reached CEFR B2, as well as a good extra certificate for students at the end of Year 3.

Sintermeerten college requires all students in the bilingual programme to take Cambridge Global Perspectives at IGCSE and AS Level. Cambridge Global Perspectives has been successful at supporting the development of English language and research skills and provides a stimulating and relevant course for bilingual students. The school has recently introduced IGCSE History as an option to challenge the more capable students and they have found this course challenging because of the level of English demanded. The school is considering other Cambridge options, for example AS English and possibly a science.

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3. Approaches to teaching and learning

This chapter considers approaches to instruction that have the highest impact on students' learning and performance and support the development of the Cambridge learner and teacher attributes.

Further reading about the ideas in this chapter is available in:

- The *Developing the Cambridge learner attributes* guide
- Chapter 4 of the '*Developing your school with Cambridge*' guide and;
- Other resources in the '*Teaching Cambridge at your schoo*l' area of the Cambridge International website

3.1 The Cambridge teacher

Excellent teaching – including the development of the learner attributes – is the single most significant factor impacting on learners' academic performance and personal growth that a school can influence. Successful schools, and successful school systems, develop and nurture highly skilled teachers who are encouraged to be creative professionals working in a collaborative culture.

It is important to stress that there is no single recipe for excellent teaching, and that different schools, operating in different countries and cultures, will have strong traditions that should be respected. However, there is a growing, evidence-based consensus that a certain number of powerful practices and approaches help learners fulfil their potential and be prepared for modern life.

Understanding cannot be transmitted from one person to another; it is always constructed in learners' minds. In order to develop a learner's understanding, their existing mental models must be challenged and extended. Teachers have to listen to the voice of the learner, in the classroom and as evidenced in the work they produce, and engage with it to support learning to help the learner develop their own understanding. This process helps to develop independent learners as they start to model the teacher's approach.

The most effective teaching practices and learning environments challenge learners' thinking beyond what they could achieve independently. The role of the teacher is to support (sometimes referred to as 'scaffold') student learning in what Vygotsky (1978) described as the 'zone of proximal development'. This is the area of challenge beyond what the learner can manage on their own but achievable with the help of a skilled other person. As a collection of practices and principles, Cambridge International describes this as 'active learning'. The word 'active' refers to learners' being actively engaged in learning rather than passive recipients of teaching. Teachers also need to be active leaders of learning rather than transmitters of knowledge or facilitators of learning. This involves constantly challenging student thinking, monitoring the impact of their instructional approaches and adjusting what they do based on feedback. See the '*Getting started with Active Learning* guide'.

Teaching and learning strategies

Teachers need to employ a variety of teaching strategies in the classroom. This will normally include carefully-designed individual learning activities, group work and whole-class instruction. The key element is the quality of learner engagement and the opportunities provided for feedback between the learner and teacher to guide the next learning steps. Whole class instruction can be a highly effective instructional approach if it includes discussion and learners have the opportunity to respond and contribute.

Teachers should apply assessment practices that regularly inform them whether learners are reaching their objectives. These assessment techniques also allow learners to understand where they are on their learning journey and how they can improve (see the '*Getting started with Assessment for Learning* guide').

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Teachers as role models

Outstanding teachers model the Cambridge learner attributes. They are confident, responsible, reflective, innovative and engaged because they:

- **Have mastery of their subject area**. They can relate concepts and skills in such a way that students learn to understand and appreciate the nature of the academic discipline they are studying, and what constitutes excellence for the developmental stage they are teaching.
- **Teach for understanding as well as coverage**. They have the ability to engage with learners' mental ideas about the really important concepts, and take them on a journey of discovery. This approach requires learners to revisit concepts over an extended period of time and within different contexts. This spiralling strategy reinforces learning and leads to deeper levels of understanding.
- **Connect learning to the real world**. They connect learning to other topics in the subject, other disciplines and the experience of learners – making learning relevant.
- **Scaffold learning**. Teachers need to constantly challenge student thinking in the proximal zone of development. The optimal level of performance for a learner is the level that they can reach when they receive expert support, as distinct from the functional level, which they can achieve independently. Scaffolding learning helps to close this gap.
- **Have a learning rather than a performance orientation**. Chris Watkins (2010) points out that too many schools and teachers are more concerned about students looking good rather than learning well. There is considerable evidence that learning to learn is an effective strategy at raising student performance and preparing them to be independent, self-regulated learners equipped for modern life.
- **Are able to model problem solving and consider themselves as mentors as much as teachers**. They are concerned with the holistic development of the learner and understand the critical role that attitudes, emotions and self-confidence play in learning. They communicate a love of learning and believe every learner can achieve.
- **Understand, and can apply, assessment for different purposes**. They have an excellent grasp of summative assessment practices, but they also understand how to use assessment to support student learning. This is the process of identifying what the learner has or has not achieved in order to plan the next steps in learning and provide appropriate support.
- **Use a variety of different teaching strategies and activities**. This includes whole class instruction, collaborative group work and creative assignments and activities, as well as overseeing individual learning.
- **Are reflective and creative practitioners** engaged in ongoing effective professional learning.
- **Are collaborative and supportive of their colleagues**, the school and the school's community.

In order to support schools, Cambridge has developed a set of teacher standards which define the key professional characteristics and practices that teachers should develop to enable effective student learning in Cambridge schools. The standards can help to provide benchmarks against which teachers and their schools can evaluate their current practice and plan future development. They can show how the Cambridge Teacher and Cambridge Leader attributes are demonstrated in practice and they can contribute to the development of a shared frame of reference within which schools can work to improve the quality of teaching and leadership. The standards are flexible and have been developed so that they can be used to best effect in each school context providing a benchmark of what Cambridge considers to be teacher quality. See here:

3.2 The Cambridge learner and teacher attributes

Schools want their learners to combine both a deep understanding of their own culture and nation, with the skills to be global learners who are able to contribute and adapt to the uncertainties of the modern world. Cambridge introduced the learner/teacher attributes (Table 8), which recognise that a

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meaningful curriculum is more than a collection of different subjects. Learners need to develop the academic abilities, life skills and attitudes needed to be successful in higher education and in the world of work.

The purpose of the Cambridge learner and teacher attributes is to support the development of five powerful and highly desirable learning habits that will inspire students to love learning and help them to lead fulfilled and successful lives. Students who demonstrate the attributes habitually and skilfully employ a broad range of cognitive skills and socio-emotional skills (including personality qualities such as resilience, self-motivation and self-regulation) towards effectively managing their performance.

Table 8: Learner and teacher attributes

	Cambridge learners	Cambridge teachers
Confident	Confident in working with information and ideas – their own and those of others. Cambridge learners are confident, secure in their knowledge, unwilling to take things for granted and ready to take intellectual risks. They are keen to explore and evaluate ideas and arguments in a structured, critical and analytical way. They are able to communicate and defend views and opinions as well as respect those of others.	Confident in teaching their subject and engaging each student in learning. Cambridge teachers know their subject well and know how to teach it. They seek to understand their students and their educational needs. They strive to communicate a love of learning and to encourage students to engage actively in their own learning.
Responsible	Responsible for themselves, responsive to and respectful of others. Cambridge learners take ownership of their learning, set targets and insist on intellectual integrity. They are collaborative and supportive. They understand that their actions have impacts on others and on the environment. They appreciate the importance of culture, context and community.	Responsible for themselves, responsive to and respectful of others. Cambridge teachers are highly professional in their approach to teaching, and they are collaborative and supportive. They understand that their actions will help shape future generations and they are concerned about the holistic development of every individual they teach.
Reflective	Reflective as learners, developing their ability to learn. Cambridge learners understand themselves as learners. They are concerned with the processes as well as the products of their learning and develop the awareness and strategies to be life-long learners.	Reflective as learners themselves, developing their practice. Cambridge teachers are themselves learners, seeking to build on and develop their knowledge and skills through a virtuous circle of reflection on practice – involving research, evaluation and adaptation. They support students to become independent and reflective learners.
Innovative	Innovative and equipped for new and future challenges. Cambridge learners welcome new challenges and meet them resourcefully, creatively and imaginatively. They are capable of applying their knowledge and understanding to solve new and unfamiliar problems. They can adapt flexibly to new situations requiring new ways of thinking	Innovative and equipped for new and future challenges. Cambridge teachers are creative, experimenting with new ideas and pursuing an enquiring approach in their teaching. They are open to new challenges, being resourceful, imaginative, and flexible. They are always ready to learn and apply new skills and techniques.
Engaged	Innovative and equipped for new and future challenges. Cambridge teachers are creative, experimenting with new ideas and pursuing an enquiring approach in their teaching. They are open to new challenges, being resourceful, imaginative, and flexible. They are always ready to learn and apply new skills and techniques.	Engaged intellectually, professionally and socially, ready to make a difference. Cambridge teachers are passionate about learning within and beyond the classroom, sharing their knowledge and skills with teachers in the wider educational community.

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These attributes are not intended to be exhaustive. Schools may want to supplement them with others derived from the school's vision. To make the learner attributes more meaningful, school leaders should actively engage the school community with them, helping people understand why they matter and how they fit in with the school mission.

Subject curricula are more than subsets of knowledge to be taught and assessed by teachers and learned by students. They are the basis for the teaching and learning programmes that teachers use to express and deliver their wider expectations of learners. When planning lessons, teachers can build in opportunities for students to participate in learning activities and events that help grow and advance the development of learner attributes – consistent with the active learning approach described in the previous section.

The learner attributes apply across the curriculum and need to be supported both through the school's curriculum and co-curricular programmes.

When designing the school curriculum, it is important to ensure a breadth and balance of subjects and educational activities that contribute to cognitive, creative and psychomotor development. Some subjects lend themselves particularly well to collaborative work, creative expression and developing learner research skills, whether individual or collaborative (for example Cambridge Global Perspectives).

Having a rich selection of co-curricular activities will provide learners with opportunities to develop the inter- and intra-personal skills described in the attributes.

The school's environment, culture and the unacknowledged learning that permeates the school community beyond the classroom, will also have an important role in nurturing these attributes. Hence, the whole school community needs to be engaged with them.

In every school there will be some discrepancy between planned learning outcomes and the experience learners actually receive. It is extremely important to monitor and evaluate the experienced curriculum to see if what learners actually experience corresponds to what was intended. School evaluation procedures involving learners, teachers and parents can provide insightful feedback (see Chapter 4).

> "Becoming a reflective learner also requires being confident, responsible, innovative and engaged."

3.3 Becoming a reflective learner

The reflective attribute highlights the importance of learners understanding themselves as learners. This requires them to constantly reflect on their learning and accurately judge their own progress. They are able to employ a range of strategies to overcome the learning challenges they will inevitably face. Becoming a reflective learner also requires being confident, responsible, innovative and engaged. All of the learner attributes are interconnected.

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Reflective learners:

- are effective at planning and managing their work and performance and accurately evaluating their progress
- understand themselves as learners and the nature of the knowledge they are learning
- apply their understanding to performance, constantly monitor what they are doing and produce appropriate responses
- are able to think both critically and creatively so as to overcome barriers to learning and engage with subject content deeply
- learn from mistakes and see failure as a learning opportunity
- are emotionally resilient when confronted with setbacks
- are confident, but not arrogant, in working with others and sharing ideas
- care about the learning of others and realise that learning is social and collective.

While most schools would agree that learning how to become a reflective learner is critical, many assume that learners will develop these skills independently and so it is not considered as part of the curriculum.

All teachers should prioritise and understand their role in helping students to learn how to learn. Some schools have tried to teach learning/reflective/study skills as an extra course. Separate classes tend not to be very successful because learning strategies and reflective practice are best developed in the context of the learning students experience in their classes.

Effective learners understand that learning is an active process involving questioning, discovery of barriers, devising strategies to overcome the barriers, constantly evaluating progress and changing what they do if it does not work.

Less effective learners often take a passive approach. When trying to revise, for example, they read and re-read books and their notes, trying to absorb the material. This is based on the false premise that understanding can be transmitted from a text (or a person) to the memory.

Active learning has to be deliberately practised in different contexts, and supported by the school and individual teachers who understand and model the practices themselves. This will not happen unless it is emphasised as a curriculum competence and supported by structures and systems that emphasise:

- clearly identifying learning aims and objectives in each subject
- the development of concepts (and therefore language) that help individuals understand and describe the learning process they are going through
- emphasising a holistic understanding of each academic discipline, building bridges between what is learned in one context and in another
- ongoing professional development for teachers and the creation of professional learning communities that support teaching practice.

Reflection and learning to learn are considered in more detail in chapter 3 of the '*Developing the Learner Attributes*' guide.

3.4 Disciplinary and inter-disciplinary approaches

Schools usually, and for good reason, design the school curriculum around the provision of a balance of different subjects appropriate for each age group. However, there are many areas of overlap between subjects. The school curriculum should therefore enable students to develop a holistic understanding of themselves as learners, and to reflect on the similarities and differences between different subject approaches.

The main reason for including academic disciplines in the curriculum is that they nurture the ability to think critically and solve problems with applications that are not easily acquired from everyday experience. Michael Young describes this as 'powerful knowledge' (see Young, 2013). The humanities, social sciences, science, mathematics, languages and the arts - when well taught and appropriately assessed - all develop the ability to think critically and creatively. They do this in ways that are not easily transferable to other contexts.

In order for students to become effective critical and creative thinkers in everyday life, they need to be able to reflect on and apply approaches they learn

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in academic disciplines in an interdisciplinary way. Interdisciplinary understanding is extremely important. It refers to the ability - and confidence - to navigate between disciplines, make connections and develop a holistic appreciation of knowledge that provides new perspectives.

Disciplinary understanding needs to be the foundation on which a rigorous interdisciplinary approach is based. Without this foundation, learning can lead to superficial coverage and confusion. Teachers, backed by a supportive curriculum, can help make connections in students' minds between what they learn in one context and another.

Excellent schools support the development of interdisciplinary understanding by expecting teachers to plan collaboratively. Teachers need to understand what their colleagues are teaching to a particular year group in order to make connections with their own classes. Some schools identify interdisciplinary links in the curriculum. This may be done in an informal way with individual teachers sharing their teaching plans in the staff room, or during meetings scheduled for this purpose. One simple example of this would be where students have learned some statistical skills in mathematics, and the geography teacher makes them apply this knowledge to their geography coursework, thereby reinforcing the concepts.

Another way of reinforcing interdisciplinary links is to have curriculum coordinators examining the learning across particular age groups, helping to identify and support meaningful connections. This complements the work of heads of department, who oversee coherence and consistency within a vertical subject curriculum.

Curriculum planning is very important when it comes to choosing the activities, courses and qualifications that will enable learners to draw on their experiences across the curriculum in order to think in interdisciplinary ways. Learners need to be challenged, required to produce extended project work and make presentations on their findings, working collectively and individually on different assignments. This is the approach adopted in Cambridge Global Perspectives.

Cambridge Global Perspectives

Cambridge Global Perspectives is an interdisciplinary programme, offered at Cambridge Primary, Lower Secondary, IGCSE, AS & A Level.

Cambridge Global Perspectives focuses on the nature of argument and evidence, encourages understanding and respect for the perspectives of others, and develops a range of skills needed for success in higher education and the world of work in the 21st century.

Students learn to appreciate a variety of alternative perspectives on global issues where ideas and interests compete and there are no easy answers. They learn how to evaluate different arguments, in particular the evidence and reasoning used to support them, as well as to improve the quality of their own arguments. These important skills are transferable to learners' other subjects.

Through studying global topics, learners gain an international context in which they can develop their skills. Students develop flexible, reflective, creative and critical thinking. They learn how to research issues, arriving at well-reasoned and evidence-based conclusions. Students also learn to work collaboratively with others and effectively communicate and critique ideas so that they become more confident, responsible, reflective, innovative and engaged.

Cambridge Global Perspectives can be taught as a stand-alone subject. However, schools can also opt to use Cambridge Global Perspectives as the curriculum core. This places it at the heart of the school curriculum and emphasises its interdisciplinary nature. Teachers of other subjects would be made aware of its learning and assessment objectives and, where applicable, support them in the teaching of their own subject. Learner research and project work would be coordinated, with subject-expert teachers acting as mentors across the curriculum.

3.5 Using conceptual frameworks to support learning

Concepts are a way of categorising things to make sense of a complex and diverse world. Through this grouping we create a shared framework for understanding, communication and action. Each school subject involves a large number of concepts. Substantive concepts are part of the substance or content

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knowledge in a subject, for example in geography these might include 'river', 'trade', 'city' or 'ecosystem'. Second-order concepts shape the key questions asked in a subject and organise the subject knowledge, for example second-order concepts in history might include 'cause and consequence', 'change and continuity', 'similarity and difference' and 'historical significance'. There will often be an overlap of substantive concepts between subjects. A student might learn about 'renewable energy' in science, geography, economics and politics. There may even be some overlap of second-order concepts, for example 'change' in both history and geography. It is the particular combination of substantive and second-order concepts that makes each discipline distinct and unique.

A threshold concept is one that, once understood, modifies learners' understanding of a particular field and helps them to make progress to the next level. It helps them to go through a 'doorway' into a new way of understanding a topic or subject (Meyer and Land, 2003).



Part of effective teaching, supported by effective curriculum and assessment planning, is identifying which concepts are most important or 'key' for a particular developmental stage of learning. Cambridge syllabuses help scaffold learning through identifying important concepts. However, teachers need to adapt these to their own circumstances and incorporate them into their lesson planning and instructional design. Thinking carefully about key concepts can help teachers and heads of Department to better understand their subject discipline, and to support their learners 'progress.

Key concepts help create an understanding of the structure of a discipline, providing opportunities to link, review and put knowledge into context. This helps learners to progress, as well as to think and behave as a skilled mathematician, historian, chemist etc. A key concept will often link one topic to another, for example in economics, the concept of 'opportunity cost' links other areas of the curriculum such as production possibility frontier and the theory of comparative advantage.

For more guidance see the '*Getting started with Key Concepts*' guide.

3.6 Collaboration

Students need to learn to function effectively as team members and leaders, as this is an important ability in life and the workplace. They also need to learn to solve problems collaboratively. The Organisation for Economic Co-operation and Development (OECD, 2013, p. 6) defines collaboration as follows:

'Collaborative problem-solving competency is the capacity of an individual to effectively engage in a process whereby two or more agents attempt to solve a problem by sharing the understanding and effort required to come to a solution and pooling their knowledge, skills and efforts to reach that solution.'

Collaborative problem-solving requires teamwork where individuals actively, responsibly and productively work towards a shared goal. Individual responsibilities may change as progress or obstacles are met. The skills required to be an effective collaborator are different from those required to be a good

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individual learner. Students need to be able to define the problem and ensure they have a joint understanding of what is being asked, think critically as a group, communicate and reflect on how well the group is progressing towards solving the problem. Collaboration is not the same as cooperation and this distinction needs to be understood by teachers planning group work.

Schools that focus on the learner attributes have a responsibility to provide opportunities for collaborative learning through well-planned learning activities. Many academic disciplines can provide such learning opportunities through collaboration, including social science fieldwork and science practicals, or project work in courses like Cambridge Global Perspectives and enterprise. The co-curricular programme provides opportunities for group work and collaboration.

3.7 Information literacy and using information & communications technology [ICT] in the classroom

Effectively using ICT resources is another essential skill all learners need to develop. Over the past decade, the use of digital technologies in classrooms has continued to expand. Desktops, laptops, tablets and smart phones are commonly used for learning, as educators find ways to employ today's technologies in school classrooms across all subjects. Including ICT-based resources and activities in teaching programmes can be challenging, but it is vital for today's generation of learners as they use ICT resources to access, process, evaluate and communicate information and data.

It is essential that ICT is used to support good classroom practice. Any technology used must enhance carefully planned teaching and learning goals - not replace them. One example of this is when teachers use technology, e.g. an interactive whiteboard, to develop understanding of new ideas in a way that engages the whole class as active participants rather than as another medium for the teacher to lecture. Cambridge offers professional development qualification courses and qualifications that focus on the optimum use of ICT in classrooms. See here for more information.

With an abundance of information on the internet information literacy has become critically important. Knowing how to access information is one skill but even more important is the ability to critically engage with the information and make balanced judgements about its meaning and reliability. This ability requires an understanding of the nature of the data and the area of knowledge to which it relates. For this reason information literacy needs to be at the heart of each discipline and an area of interdisciplinary inquiry. Information literacy, for example, is as the heart of Cambridge Global Perspectives.

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4. Leadership, curriculum evaluation and building school capacity

This chapter considers the critical role played by school leadership in planning, implementing and evaluating the curriculum. The final section of the chapter considers ways of measuring the impact of interventions or changes in practice in order to make judgements about progress.

4.1 Leadership

Schools offering Cambridge International's programmes and qualifications operate using many different administrative structures. Many are state funded, while others are independent. Some schools are privately owned and commercial, while others are run by school boards and are not-for-profit. No matter what the structure, this chapter aims to highlight leadership principles and practices that are most likely to support the development of an effective school.

Effective schools are schools that:

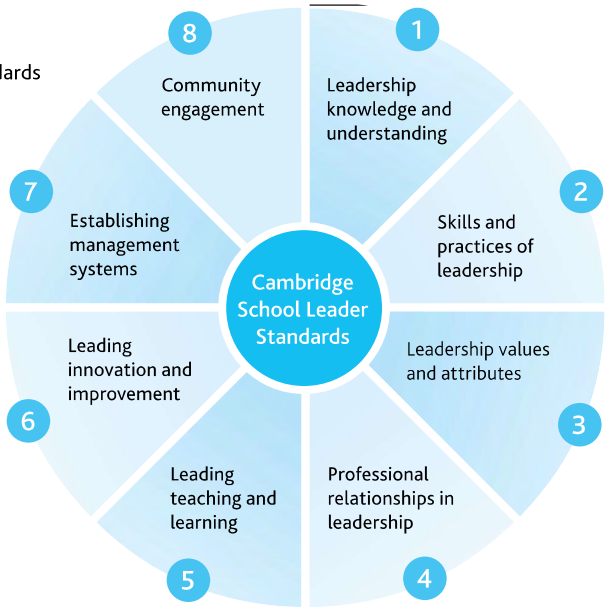
- successfully progress the learning of all of their students, regardless of background, beyond their normal expected developmental rate of growth.
- ensure the educational experience students actually receive, including the impact of the school curriculum, teaching approaches, the co-curriculum and the learning environment, closely aligns to the school vision and educational aims.

Schools will assign different management responsibilities to different individuals within the senior administration team. All schools need to have an individual in the school, normally the principal or school head, who is the senior educational leader. In some schools, this role is separate from the school business head or chief executive, who is responsible for school administration. In other contexts, the business head is line managed by the principal, who has overall responsibility for the school. The focus of this chapter is very much on the role of the senior educational leader.

The Cambridge School Leader Standards define the key professional characteristics and practices that leaders should develop to enable effective teaching and student learning in Cambridge schools. Teachers cannot achieve and sustain high quality outcomes for all students without effective leadership and so the Cambridge School Leader Standards identify and support the challenges of achieving such leadership. They confirm what successful leadership practice looks like and help leaders to determine areas and priorities for their own professional development.

The Standards are divided into eight headings (see figure 3) and 40 standards statements which are detailed and concrete. These enable users to understand how to demonstrate achievement in individual standards.

Figure 3: Cambridge School Leader Standards



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Instructional leadership

The Cambridge School Leader Standards place a clear emphasis on the role of the educational leader as an instructional leader.

Instructional leadership focuses on the quality of instruction and maintaining a focus on learning. Robinson's [2007] study of the leadership styles and behaviours that had the greatest impact on student outcomes, concluded that: *"The more leaders focus their professional relationships, their work and their learning on the core business of teaching and learning, the greater their influence on student outcomes."*

Robinson [2011] goes onto identify 5 key functions 'student centred' leaders engage in:

1. Establishing Goals and Expectations. This includes creating a positive and inclusive school climate focused on a culture of learning.
2. Resourcing Strategically. The focus is on using resources in strategic ways to maximum impact to optimise student learning.
3. Ensuring Quality Teaching.
4. Leading Teacher Learning and Development. Professional learning opportunities are focused on improving instructional impact.
5. Ensuring an Orderly and Safe Environment so that everyone in the school, students and staff, feel safe and supported.

> "Everyone in the school community - heads of department, heads of year, teachers and other educators, parents and students, are empowered to play an appropriate leadership role."

In effective schools, the principal is a strong instructional leader. Moreover, leadership is widely distributed as it is viewed more as a process than a position of responsibility. Everyone in the school community - heads of department, heads of year, teachers and other educators, parents and students, are empowered to play an appropriate leadership role.

School administrators (including the principal, heads of department and heads of year) are responsible for building school capacity in a way that allows teachers to realise their full potential.

A number of the school's senior administrators should be actively involved with teachers, observing teaching and learning, and engaging in a professional discussion with teachers about what is happening in the classroom. This professional link can become a very powerful motivational force for teaching professionals, and critical for senior administrators in developing a deep appreciation of what is actually happening in the school.

Administrators need to support teachers so that they can concentrate on student learning and planning teaching. They are responsible for ensuring that the right structure is in place, and that there are enough appropriately qualified staff to deliver the curriculum. Roles and responsibilities need to be well defined and clearly communicated. Ideally, planning time is built into teachers' schedules so that they can work collaboratively in teams (in academic departments or year groups) on developing learning activities. Where possible and practical, teachers should be encouraged to visit each other's class and provide peer support to their colleagues. This is particularly important in developing less experienced teachers and a very cost-effective form of professional development.

Teachers also play a leadership role, in that they are involved in creating, implementing, monitoring, reviewing and refining practices and systems, and then measuring impact in order to improve student learning. Nurturing and using teacher talent in this way creates a virtuous circle of motivation, desire to learn more, commitment and enhanced practice. Working collaboratively to resolve collective challenges can also create a shared sense of purpose and a powerful instrument of change.

Listening to the learner voice is crucial to understanding their perspective on the curriculum and how it is implemented.

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Leadership and management functions relating to the curriculum include:

1	Curriculum planning and evaluation
2	Teacher recruitment and evaluation
3	Professional development (PD).
4	Development and implementation of quality assurance policies and procedures.
5	Managing change
6	Involvement with the school and local community.
7	Management of the assessment process and relationships with Cambridge (exams officer).
8	Timetable (considered in the previous chapter).
9	Student admissions, progression through the school and guidance on to higher education.
10	Measuring impact



4.2 Curriculum planning and evaluation

Periodic curriculum evaluation, focused on evidenced-based judgement with a view to improving practice, will help ensure that the curriculum is accomplishing its purpose. Evidenced-based evaluation processes will help to measure what achievements have been made and to identify what needs more work. Table 9 identifies some of the key questions that evaluations should address, although this is by no means a complete list.

Table 9: Some essential questions for curriculum planning and evaluation

Area for review	Examples of questions
Curriculum planning	Does the school's curriculum: • deliver the most appropriate programme of study to support the school's mission and educational aims? • deliver a balanced, coherent and consistent programme of learning with clear and smooth progression routes designed for the needs of learners? • appropriately challenge all ability levels? • recognise the language background of learners and provide them with the support they need to access the curriculum? • provide sufficient opportunity for learner choice? • provide pathways that enable learners to achieve the entrance or admission requirements for university, higher education courses and employment?
Quality assurance policies and practices	• Are your quality assurance policies and practices fit for purpose, clear in their intent and easily understood? • How do you know that the school's quality assurance policies are being adhered to? • What areas need additional quality assurance policies and practices?

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4. Leadership, curriculum evaluation and building school capacity

Area for review	Examples of questions
Teacher evaluation Fulfilling Cambridge (and other qualification) subject requirements Effective delivery of learning and meeting learner needs	• Are the stated aims of the curriculum being addressed within the teaching programme? • Are teachers teaching to the syllabus correctly, covering all the prescribed content and skills? • Is there evidence that teachers are using a variety of appropriate teaching strategies and learning activities? • Are the assessment objectives and methodology for assessment being respected? • Are coursework components being correctly implemented and supported? • Is there evidence that teachers are using formative assessment appropriately to inform their teaching practice? • Is there evidence that teachers are differentiating their practice to the needs of individual learners? • Do learning activities provide opportunities for the development of the desired skills and learner attributes? • How are the views of learners taken into account? • Is there a process of lesson observation with supportive feedback to effect improvements in teaching and learning? • Are lessons supported with sufficient resources, suitable for the level of study? • Do lessons include topics of national relevance by structuring and delivering content in local contexts?
Professional development	• Are all teachers engaging in suitable professional development activities to ensure successful implementation of the desired curriculum? • Is your professional development programme meeting the specific needs of teachers and the requirements of the strategic plan? • Is the balance between internal and external professional development opportunities appropriate? • What evidence do you have that the professional development programme is positively influencing classroom practice or learner achievement?

Area for review	Examples of questions
Resources and facilities	• Are facilities and administrative resources appropriate to support teaching programmes? • Do learners and teachers have access to appropriate library/ media centre and IT resources? • Are appropriate student welfare and learning support services provided? • Do you have appropriate facilities for the security of examination material?
Formal examinations and qualifications	• Do you have an exams officer to manage the administration of any Cambridge exams you offer? • Is there a process in place to make sure the exams officer carries out their duties in line with Cambridge requirements? • Are the Cambridge (and national) examination requirements and procedures being strictly adhered to? • Are the mechanisms for checking accuracy in, and completeness of, learner data sufficient? • Are the policies regarding authenticity of learners' work being followed? • Are the systems for entering, storing and exchanging learner records secure, with appropriate back-up and retrieval safeguards?
Communication and evaluation methodology	• How can you improve your evaluation procedures to get more meaningful or accurate information? • How is this information shared or disseminated to other stakeholders? • How can the school become more effective in making use of this information to refine and further develop the curriculum? • Is there effective communication and exchange of information with external agencies, for example, Cambridge, other qualification organisations, ministries and other governmental agencies? • Are learner and teacher schedules (timetables) and calendars of events accurate, clear and informative?

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Many schools use recognised evaluation/accreditation frameworks to support the process of curriculum and whole-school evaluation. These will provide their own list of questions, processes and criteria. Often these are external, provided by national authorities or accreditation agencies. What is important is that they lead to school improvement and that the whole school community is involved in relevant evaluation and development activities so that everyone takes ownership of the process.

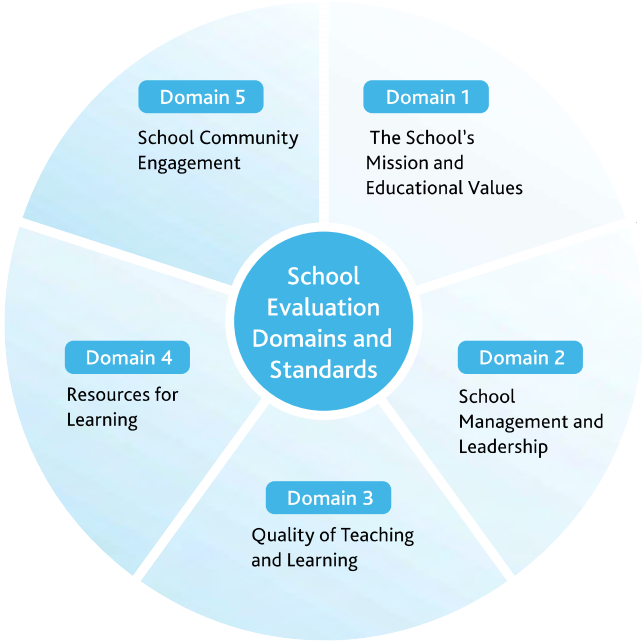
Larger scale school-wide evaluations are very time consuming. For this reason they are conducted only occasionally. It is important that smaller evaluation cycles are built into the regular operations of the school so that evaluation and development are seen as an ongoing process.

Cambridge offers a school self-evaluation service that can contribute powerful insights as part of a broader evaluation strategy. The Cambridge instrument investigates five domains [see figure 4]. These are centred on research-based indictors of effective schools including:

- high academic standards and expectations
- a school climate that focuses on achievement
- instructional leadership
- high performing teachers
- students with a strong self-efficacy and confidence as learners
- parents with high aspirations and expectations
- learning resources that are fit for purpose
- excellent school governance that includes responsible financial management.

> “Cambridge offers a school self-evaluation service that can contribute powerful insights as part of a broader evaluation strategy.”

Figure 4: Cambridge School Evaluation Domains



The self-evaluation process provides an opportunity for schools to engage with their three main stakeholders - students, teachers and parents. It allows them to collect data that will help them reflect on their performance, design improvement strategies and track progress over time. See more here.

4.3 Teacher recruitment and evaluation

As good teaching is such a powerful influence on student learning, nothing is more important than ensuring teaching is as consistently excellent as it can possibly be. Schools should recruit teachers who share the school's vision and, ideally, display the teacher/learner attributes. The best way to improve teaching

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practice is to conduct well-designed teacher evaluation and professional development, while building a culture where it is valued and understood.

Teacher evaluation is a very important quality assurance process. Schools will operate different systems, often prescribed by national authorities. While the summative element of judgement or appraisal is important, the formative aspect is even more so. The most effective forms of evaluation allow teachers to self-reflect against elements of clearly-defined criteria. These criteria include the Cambridge Teacher Standards and the learner/teacher attributes, as well as performance criteria in terms of learner results and value added to student learning. Reflective practice, one of the key concepts in the learner/teacher attributes, is reinforced.

Many schools also involve learners in providing feedback to teachers, whether formally or informally. Learner evaluations of their classes, when they are carefully designed and non-threatening, are a powerful practice that provides valuable formative feedback to teachers.

Teacher evaluation needs to relate closely to the school's professional development programme. This ensures that professional development supports areas identified for development during the evaluation process.

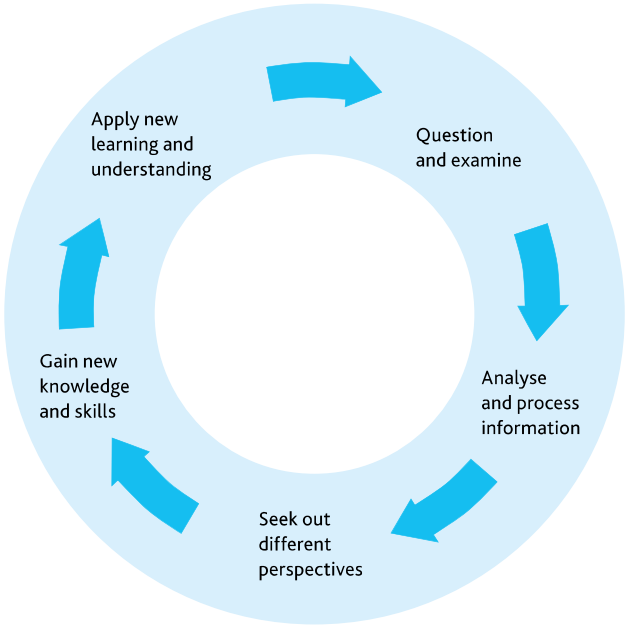
Chapter 6 of the '*Developing your school with Cambridge*' guide provides more information.

4.4 Professional development [PD]

Professional development (PD) includes a wide range of activities and practices that support ongoing and evidenced-based reflective practice (see Figure 5: The reflective cycle). This involves participants in:

- reflecting on current practice through the teacher evaluation process, which will identify PD priorities
- working with peers to share ideas and to observe, record and give feedback on classroom experiences
- reviewing relevant resources to introduce and become familiar with new concepts
- accessing recognised local or international educational expertise to enhance understanding
- planning, trialling, evaluating and modifying new practices and resources
- using collaborative support structures and processes, including peer critiquing and online services.

Figure 5: The reflective cycle



PD needs are likely to span the following areas:

- subject and resource support, including familiarisation with subject content, learning activities and skill acquisition and development
- enhancing understanding of pedagogic and assessment practices and their planning and integration into teaching programmes

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- building professional capacity through collaboration with other teaching professionals in the school and through inter-school subject cluster groups or networking
- opportunities to upgrade professional qualifications, with the potential to become teacher-trainers or examiners, or to contribute in other ways that advance the introduction of the curriculum and the uptake of the associated new pedagogy and assessment methodology.

PD needs will be situational. Teachers new to the profession and/or to Cambridge programmes will need close support by experienced colleagues and to attend appropriately targeted training. Experienced teachers will want to improve their professional practice by completing advanced PD programmes, doing PD qualifications, and by becoming involved in professional communities of practice. These resources, courses and professional collaborations stimulate participants to reflect on their experience of working in a school environment and to evaluate their practice.

In this way, participants to reflect on their experience of working within a school environment through stimulus from resources, courses and professional collaboration. Reflective PD encourages individuals to develop action plans and experiment with new strategies. This experimentation gives them additional experiences on which they can reflect, and more opportunities for professional growth.

PD opportunities should not just be for teachers. The school leadership team and teaching support staff will also contribute to the successful implementation of the curriculum and will therefore benefit from relevant and constructive professional development.

For more information about our professional development services see chapter 5 in this guide and Chapter 7 of the '*Developing your school with Cambridge*' guide.

4.5 Developing and implementing quality assurance policies and procedures

Policies and procedures should provide teachers and learners (and where appropriate, parents) with clear direction, guided by the school's mission and aims. They need to be understood by the school community and enforced through quality assurance practices, including teacher evaluation. These resources, courses and professional collaborations stimulate participants to reflect on their experience of working in a school environment and to evaluate their practice.

In addition to the teacher evaluation policy, those that relate to the curriculum usually include:

Language policy: Every school will have its own language profile, so it is important that this is reflected in a policy that recognises the language needs of different groups of learners and teachers. It will consider the solution to questions including: How will English as a second language be supported? How will learners be encouraged to develop their first or best language? What responsibilities do teachers have to support language learning?

Assessment policy: How often are internal summative grading and reporting conducted? What are the grading procedures and how does this relate to the criterion system used by Cambridge and/or other qualifications taught in the school? How is assessment for learning supported? What can learners and parents expect from teachers in terms of reporting and detailed feedback on specific assignments and over specified lengths of time?

Homework policy: What are the expectations? How is this organised to ensure classroom learning is supported?

Special Educational Needs and Gifted and Talented policy: What are the expectations for teachers to differentiate so that all learners are appropriately challenged? How does the school support learners with specific needs?

Co-curricular expectations: What does the school provide for learners beyond regular classes? How does this fit in with teacher contracts and expectations? How does the school work with the local community to support learner participation in activities that it cannot provide itself, or are better provided outside the school?

Discipline policy: What is the code of conduct for teachers and the code of conduct for learners? How is the code of conduct supported and enforced?

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What support does the school provide to learners who display discipline problems?

For further information see chapter 3 of the '*Developing your school with Cambridge*' guide.

4.6 Managing change

Introducing Cambridge curricula for the first time will present challenges, particularly if teaching staff are not familiar with the programmes or do not have a background of relevant experience. The high value Cambridge places on teachers becoming creative professionals means that preparation is vital. In other words, we expect teachers to develop their own schemes of work and apply the syllabus to the needs of their learners in the context of the school. To a lesser extent, this is also true for experienced staff who will also need time to plan and refresh their lesson plans, recognising that every class of learners is unique.

Teachers new to Cambridge will be involved in:

- becoming familiar with subject requirements, including assessments, and planning how to satisfy those requirements
- writing or rewriting schemes of work and producing new teaching material
- accessing and evaluating subject resources, for example, textbooks, websites and workbooks
- planning and trialling teaching strategies and assessment practices.

Teachers should be supported so that they have enough time to prepare properly and have access to professional development. One option is to have a 'pre-implementation year', to give teachers the opportunity to review, prepare, practice and evaluate the new material and approaches before full implementation. The opportunity to trial units of work and practise assessment tasks will help to build teachers' confidence and develop a sense of purpose towards the new curriculum.

Mentoring and team teaching are excellent strategies to help manage curriculum change and development. Experienced teachers can support less experienced colleagues and can also lead professional development activities within the school. Team teaching allows teachers to share expertise, provide professional support and learn new skills. While the content in different academic disciplines is different, many of the teaching and assessment principles and practices are often similar, so inter-departmental collaboration can also be very productive. Finally, we recommend working with another school that has experience of Cambridge to support teachers during a time of change. This can be very useful in smaller schools where there may only be one subject teacher at each school level.

> "Teachers should be supported so that they have enough time to prepare properly and have access to professional development."

4.7 Involving the local community

It is very useful if parents understand the curriculum, and the choices that learners have to make at different stages. Parent information sessions with question and answer sessions can support school communications.

Parents should support the development of the Cambridge learner attributes at home. Schools can encourage this by using the school reporting process to map learners' progress against these broader attributes, explaining their significance. In the same way that it can be beneficial for staff evaluation to include self-reflection, learners will also benefit from an element of self-evaluation in reporting. Some schools require students to write their own self-evaluations as part of the reporting process. Other schools conduct parent / student conferences where the student leads the discussion. For an example of this see case study 9 on page 43 of the *learner attributes guide*.

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To understand the wider world, learners must first develop a deep appreciation of their local context and culture. Participating in community activities can enrich the curriculum, but can also benefit learners by giving them insights into career options through links with local businesses. Becoming aware of post-school options can help learners choose the subjects they want to study, enabling them to be responsible for their next steps in learning. It can also increase motivation levels and encourage greater participation in classroom activities. Community service can support the development of the learner attributes and help nurture a sense of social responsibility.

4.8 Administering our assessments (exams officers)

The exams officer is the person appointed by the head of centre to act on behalf of the school, with specific responsibility for administering Cambridge exams. We provide detailed support and training for exams officers managing our assessment processes. For more information please see here.

4.9 Student admissions, progression through the school and guidance on to higher education.

Transparency is key in student admissions. The school's policies and selection criteria must be clearly published on the school website and in other relevant documentation. For instance, if potential students must pass an entry test, the requirements must be freely available for students and parents to understand.

Once a student has been accepted, it is important to provide the appropriate level of challenge at each stage of the students' education as described in chapter one and two. The choice of subjects at IGCSE/O Level can be vitally important. If a student decides they wish to study medicine but they did not take chemistry IGCSE, they would be unable to undertake A Level study in the subject and therefore unable to pursue their chosen pathway. It is recommended that students study English, mathematics, at least one science, at least one humanities and one language in IGCSE plus other subjects as appropriate for future career paths. For those wishing to pursue higher education in science, engineering and medicine, all three science subjects in IGCSE would provide good foundations.

At A Level, subject choice becomes even more important. In the UK, the Russell Group universities publish a guide called 'Informed Choices'. This guide gives a list of what they refer to as 'facilitating subjects' as well as guidance on some of the subjects considered less desirable. Mathematics is regarded highly by all subject disciplines. The sciences, history and English literature are all regarded as facilitating subjects. If you wish to study economics, most universities require A Level mathematics rather than A Level economics.

It is recommended that those staff who are involved in advising students on subject choice and on their university/college applications look at the information available on the Cambridge Assessment International Education website. The recognitions database provides a tool for students to search by country and qualification to see where their qualifications are accepted worldwide and if they are given credit in institutions in North America.

General guidance and resources are provided here.

Information on the entry requirements and admissions processes of top destination countries can be accessed here.

4:10 Understanding and measuring impact

Measuring impact is critical to evaluation, and thereby to developing practice and improving student learning. Without measuring impact, how will we know if curriculum revisions or new approaches to teaching and learning have made a difference to our learners' progress and attainment? This section looks at how leadership in schools can answer these questions by introducing the concept of effect size and focusing on three areas in particular:

1. Improvements in student progress and attainment.
2. Changes in teacher self-efficacy.
3. Impact on student self-efficacy.

Impact focus 1: Improvements in student progress and attainment

Measuring effect sizes is one way of helping school leaders and teachers understand the impact of changes they have introduced on student progress and

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teacher and student self-efficacy. If teaching strategies or the curriculum are changed in some way, calculating effect sizes helps determine not just if learning and self-efficacy have improved, but by how much. Effect size is a useful way of quantifying or measuring the size of any difference between two groups or data sets helping school leaders and teachers understand the impact of any changes they have introduced and understand what has the maximum benefit for learners and teachers.

An effect size is found by calculating the standardised mean difference between two data sets or groups. In essence, this means we are looking for the difference between two averages, whilst taking into account the spread of values around those averages at the same time. Case study 6 below illustrates this through providing a worked example:

Case Study 6:

Using effect size to measure improvements in student progress following an intervention

Ultimately, as school leaders and teachers, we are interested in the impact of a specific educational intervention or change on student outcomes. We want to know how much progress our learners have made, as well as what they been able to attain or achieve.

Consider the following scenario:
Over the course of a term, a teacher has worked hard with her learners on understanding 'what success looks like' for any given task or activity. She has stressed the importance of everyone being clear about the criteria for success, before learners embark upon the chosen task and plan their way through it. She has even got to the point where learners have been co-authors of the assessment rubrics used, so that they have been fully engaged in the intended outcomes throughout and can articulate what is required before they have even started. The teacher is happy with developments so far, but has it made a difference to student progress? Has learning increased beyond what we would normally expect for an average student over a term anyway?

Case Study 6 *continued*

Here is an extract from the teacher's mark-book:

Student	Sept Task	Nov Task
Katya	13	15
Maria	15	20
Joao	17	23
David	20	18
Mushtaq	23	25
Caio	25	38
Cristina	28	42
Tom	30	35
Hema	32	37
Jennifer	35	40

Before we start analysing this data, we must note the following:

- The task given in September was at the start of the term – the task in November was towards the end of the term.
- Both tasks assessed similar skills, knowledge and understandings in the student. The November task needs to be as close as possible to the September task in assessing the same construct.
- The maximum mark for each was 50.
- The only variable that has changed over the course of the term is the approach to teaching and learning by the teacher. All other things are equal.

With that in mind, looking at the extract above, what conclusions might you draw as an external observer?

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Case Study 6 *continued*

You might be thinking something along the lines of:

"Mushtaq and Katya have made some progress, but not very much… Caio and Cristina appear to have done particularly well… David, on the other hand, appears to be going backwards!"

What can you say about the class as a whole?

Calculating effect sizes:

What if we were to apply the concept of 'effect sizes' to the class results above, so that we could make some more definitive statements about the impact of the interventions over the given time period? Remember, we are doing so in order to understand the size of the effect on student progress.

Let's start by understanding how it is calculated. An effect size is found by calculating the standardised mean difference between two data sets or groups. In essence, this means we are looking for the difference between two averages, whilst taking into account the spread of values (in this case, marks) around those averages at the same time.

As a formula, and from our scenario above, it looks like the following:

Effect Size = Average class mark after intervention – Average class mark (before intervention) Spread standard deviation of the class

In words: the average mark achieved by the class before the teacher introduced her intervention strategies is taken away from the average mark achieved by the class after the intervention strategies. This is then divided by the standard deviation of the class as a whole. The standard deviation is merely a way of expressing by how much the members of a group (in this case, student marks in the class) differ from the average value (or mark) for the group.

Case Study 6 *continued*

Inserting our data into a spreadsheet helps us calculate the effect size as follows:

	A	B	C
1	Student	September Task	November Task
2	Katya	13	15
3	Maria	15	20
4	Joao	17	23
5	David	20	18
6	Mushtaq	23	25
7	Caio	25	38
8	Cristina	28	42
9	Tom	30	35
10	Hema	32	37
11	Jennifer	35	40
12			
13	Average mark	23.8 =AVERAGE(B2:B11)	29.3 =AVERAGE(C2:C11)
14	Standard deviation	7.5 =STDEV(B2:B11)	10.11 =STDEV(C2:C11)
15			
16			Standard deviation overall 8.8 =AVERAGE(B14:C14)

Therefore, the effect size for this class = (29.3-23.8)/8.8 = 0.62

But what does this mean?

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Case Study 6 *continued*

Interpreting effect sizes to understand impact

In pure statistical terms, a 0.62 effect size means that the average student mark, after the intervention by the teacher, is 0.62 standard deviations above the average student mark before the intervention.

We can state this in another way: the post-intervention average mark now exceeds 61% of the student marks previously.

Going further, we can also say that the average student mark, post intervention, would have placed a student in the top 4 in the class previously. You can see this visually in the table above where 29.3 (the class average after the teacher's interventions) would have been between Cristina's and Tom's marks in the September task.

We know from results' analyses of the Program for International Student Assessment (PISA) and the Trends in International Mathematics and Science Study (TIMMS) that, across the world, a year's schooling on average leads to an effect size of 0.4. John Hattie and his team at The University of Melbourne reached similar conclusions when looking at over 900 meta-analyses of classroom and whole-school interventions to improve student learning – 240 million learners later, the result was an effect size of 0.4 on average for all these strategies. What this means, then, is that any teacher achieving an effect size of greater than 0.4 is doing better than expected (than the average) over the course of a year. From the example given in case study 6, not only are the learners making better than expected progress, they are also doing so in just one term.

Impact focus 2: teacher self-efficacy

Teacher self-efficacy is a term we use to refer to a teacher's level of confidence in their ability to guide learners to success. It captures the idea that, both individually and collectively, teachers believe they can have a highly positive effect on student learning and attainment, regardless of a student's socio-economic background and the level of motivation s/he brings to the learning environment.

This level of confidence can be found by asking teachers to self-report against questions (or items), such as:

1. How much, in your current practice, do you feel you can gauge/measure student understanding of what you have taught?
2. To what extent, in your current practice, do you feel you can use a variety of assessment strategies?
3. How well, in your current practice, do you feel you can implement a variety of active learning strategies?
4. How much, in your current practice, do you feel you can motivate learners who show little or no interest in school work?

A teacher's responses to such questions, before an intervention or change is put in place, can then be compared with their responses afterwards. Allocating a numerical code to the response options, e.g. 0 = No influence; 1 = Some influence; 2 = A lot of influence, etc, enables statistical analysis and the calculation of effect sizes (see above). An exemplar questionnaire, for adaptation by the school, can be found in the appendices.

Impact focus 3: student self-efficacy

Linked closely to the above is the idea of student self-efficacy, which refers to a learner's level of confidence about their ability to be successful within a given context (task, subject, etc) – both now and in the future. Learners with strong self-efficacy are more likely to challenge themselves when faced with difficult situations or tasks and be intrinsically motivated. They willingly exert a high degree of effort in order to be successful, and see failure as a learning opportunity or something that is within their control. Such learners tend also to recover quickly from setbacks, and, ultimately, are likely to achieve their personal goals. One of the main reasons Cambridge developed the learner attributes was to support the development of student self-efficacy.

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The level of a student's sense of efficacy can be found by asking them to self-report against questions/descriptors/items, such as the following:

1. I can succeed at anything if I try hard enough.
2. If I practised every day, I could develop any skill.
3. Once I have decided to accomplish something that is important to me, I keep trying, even if it is harder than I originally thought.
4. When I am struggling and taking longer to complete something difficult, I focus on my learning and change my approach, instead of feeling discouraged.
5. I believe that the brain can be developed, just like a muscle.
6. I think that, no matter who you are, you can significantly improve your level of capability.

Once more, a student's responses to such questions, before an intervention or change is put in place, can then be compared with their responses afterwards. Allocating a numerical code to the response options, *e.g. 0 = Not like me at all; 1 = A little like me; 2 = Like me; 3 = A lot like me*, etc, thereby enables statistical analysis and the calculation of effect sizes (see above).

An exemplar questionnaire, for adaptation by the school, can be found in the appendices.

Considerations on measuring impact

In reality, measuring and using effect sizes is not a perfect tool as the assumptions made about similar tasks and identifying only one variable as changing are not fully achievable. That said, calculating effect size provides one set of data to measure impact and needs to be part of a broader discussion and analysis.

Much of this analysis will be qualitative, trying to understand why some students have done better than others and trying to make sense of patterns in the data. School leaders and teachers must look at the data carefully and intelligently in order to understand 'why'. Why did some learners do better than others? Why did some not make any progress at all? In what areas has student attainment or self-efficacy improved, stayed the same or got worse? Its most important function is to support collaborative work and discussion around student learning and progress, helping departments and teachers to work out a common language, high expectations and a clear focus around improving student outcomes.

John Hattie's work (2010 and 2012, see annotated bibliography) provides insightful guidance to schools about what they should prioritise based on effect sizes from international research. Another valuable study is by the Education Endowment Foundation / Sutton Trust (see annotated bibliography).

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5. Cambridge International Resources and Support Services

This chapter highlights the range of support services and resources we offer to schools that are implementing Cambridge programmes. It gives an overview of the different types of support available and points to where to find more detailed information. The chapter also sets out the next steps for schools planning to introduce Cambridge or to expand their Cambridge offer.

We offer a range of support materials and services for teachers. These are aimed both at helping them effectively deliver our programmes and at meeting their professional development needs. All teachers can access this support, regardless of whether their school curriculum is wholly or partially based on Cambridge programmes.

For Upper Secondary and Advanced programmes, all our support can be accessed through the School Support Hub:
www.cambridgeinternational.org/support

For our Primary programme, all our support can be accessed via the Primary support site: https://primary.cambridgeinternational.org

And for our Lower Secondary programme, all our support can be accessed via the Lower Secondary support site:
https://lowersecondary.cambridgeinternational.org

There are four major areas of support:

1. curriculum materials and resources
2. professional development
3. school improvement services and consultancy
4. help with expanding a school's Cambridge offer or becoming a Cambridge school.

5.1 Curriculum materials and resources

Our new School Support Hub for Cambridge Upper Secondary and Advanced programmes has now replaced the Teacher Support site, making it easier for teachers to find and download the assessment and teaching support materials that they need to deliver Cambridge programmes. We provide a wide range of resources to support teaching and learning, including schemes of work, past papers, mark schemes, example candidate responses and examiner reports.

All registered Cambridge schools teaching our Cambridge Upper Secondary and Cambridge Advanced stages should make use of the School Support Hub regularly to find the resources they need.

The School Support Hub includes online teacher forums, which are a great way to keep up to date with the global Cambridge community. Cambridge teachers can use them to ask questions about their syllabus and get help and ideas from other teachers and subject experts.

Teachers can also use the 'Community Resources' area to upload their own resources to share with other Cambridge teachers, or download materials that others have uploaded to use in lessons.

www.cambridgeinternational.org/support

Assessment tools for Primary and Lower Secondary.

We provide dedicated online support to schools registered to offer Cambridge Primary and Cambridge Lower Secondary. For Primary and Lower Secondary programmes, Progression Tests are end-of-stage tests available for English, English as a Second Language, Mathematics and Science. They are designed to measure learners' progress and identify their strengths and weaknesses. For the Lower Secondary programme you can choose between paper-based and on-screen versions, depending on which is most suitable for your learners and your school.

http://www.cambridgeinternational.org/programmes-and-qualifications/cambridge-primary/cambridge-primary/assessment/

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http://www.cambridgeinternational.org/programmes-and-qualifications/cambridge-secondary-1/cambridge-secondary-1/assessment/

Curriculum Support

Schemes of work are medium-term course plans that are available for many of our subjects. They provide suggested teaching sequences and activities for the classroom. We have designed our schemes of work to be as flexible as possible and teachers choose which approach to take.

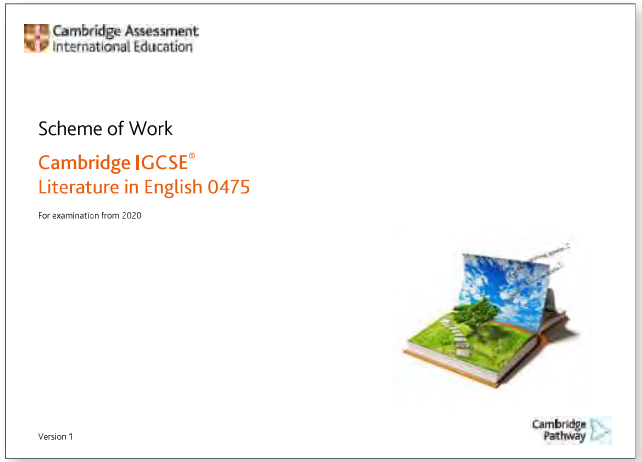
Teacher guides - some subjects have teacher guides which provide extra guidance to help teachers plan their lessons effectively, taking into account the language needs of learners. There are also suggestions to help prepare Upper Secondary and Advanced learners for their final assessment.

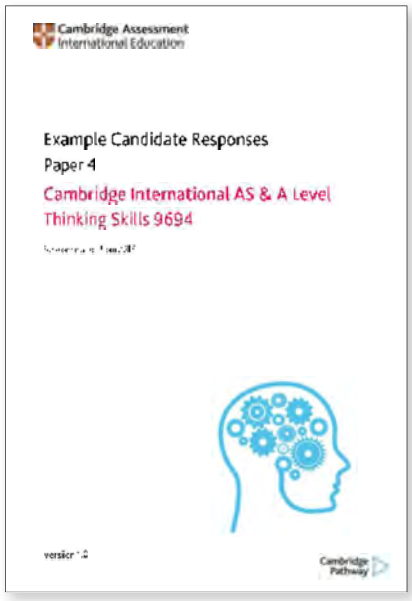
Learner guides are for teachers to share with Upper Secondary and Advanced learners to help them plan their revision programme and better understand what to expect in the examinations.

Resource Plus

Resource Plus is a collection of additional teaching and learning resources designed to help Cambridge teachers deliver challenging concepts and skills in some of our most popular syllabuses. Resource Plus materials have been created by subject experts to give you the confidence to teach new syllabus content, deliver engaging lessons, and clearly explain concepts that can be difficult for learners to understand. Some resources provide teaching support for the syllabus as a whole, while others cover individual areas in depth. More information can be found at: www.cambridgeinternational.org/resourceplus

For our Upper Secondary and Advanced qualifications there are also example candidate responses. These booklets use examples of candidates' work to show how different levels of performance (high, middle, low) relate to the subject's curriculum and assessment objectives. Each answer is annotated with examiner comments on the awarded mark and any mistakes the candidate has made. The examiner explains how the candidate could have improved their answer, and lists common mistakes made in this question across all candidates who sat the





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exam. They help teachers to understand the standard required to achieve marks, beyond the guidance of the mark scheme.

Endorsed resources

In addition to the resources produced by Cambridge International, we also endorse resources from a range of publishers. Endorsed resources go through a rigorous quality-assurance process to make sure they closely reflect the curriculum framework or syllabus and are appropriate for Cambridge schools worldwide. Resources may be 'endorsed for full syllabus coverage' or endorsed to cover specific sections, topics or approaches.

http://www.cambridgeinternational.org/support-and-training-for-schools/endorsed-resources/

Exam preparation materials

Past question papers: We publish past papers for each subject. These give learners the opportunity to practice at answering different types of question.

Examiner reports: Our principal examiners write detailed reports describing learners' overall performance on each part of the question. The reports give insight into common misconceptions shown by learners, which teachers can address in lessons.

Grade thresholds: These show the minimum number of marks learners needed to achieve in order to be awarded a particular grade.

Mark schemes: These help teachers understand how marks are awarded for each question and what examiners look for when they mark.

Coming soon: Test Maker - a new online service allowing teachers to compile customised test papers using a large bank of past exam questions

For more information go to www.cambridgeinternational.org/support
see also: ● https://vimeo.com/259843531

5.2 Professional development

The overarching aim of Cambridge professional development is to work with schools to transform classroom practice in order to improve student outcomes.

We offer a coherent framework of training and professional development for teachers in Cambridge schools, designed to meet the needs of teachers who have different levels of experience. The support we offer for teachers includes courses and resources aimed at developing the knowledge and skills teachers need to deliver specific programmes and qualifications, and others that are more general, aimed at developing teaching strategies, skills and reflective practice.

We offer courses, seminars and conferences, face-to-face and online training events and webinars. Our online courses are delivered via our virtual learning environment and help teachers to build links and exchange ideas with other Cambridge schools internationally.

Teaching Cambridge programmes and qualifications

We offer three levels of programme-specific and qualification-specific professional development, which we are continually developing and expanding:

Introductory level

Introductory Training is for teachers who are new to Cambridge programmes and qualifications. It introduces teachers to Cambridge programmes, syllabuses and curriculum frameworks and enables them to teach our syllabuses with greater confidence. We strongly recommend this training to teachers who are new to Cambridge or new to a specific qualification.

Teachers will typically learn about:

- Cambridge Assessment International Education
- the aims and structure of Cambridge programmes, syllabuses and curriculum frameworks
- assessment aims and objectives
- question papers, marking exercises and examiner feedback (only applicable for Cambridge Upper Secondary and Cambridge Advanced qualification training)

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- Progression Tests, Cambridge Primary Checkpoint and Cambridge Lower Secondary Checkpoint tests
- teaching ideas and approaches, endorsed resources that are available to support teaching.

This training is available face-to-face and online. All of our online training can be accessed on our **Professional Development Learning Community** website.

Extension level

Extension Training is for teachers who have some experience of teaching Cambridge programmes and qualifications. The training in this area enables teachers to engage with our syllabuses and curriculum frameworks in greater depth and build confidence in their delivery. We recommend this training to teachers who have attended Introductory Training and/or have been teaching Cambridge programmes and qualifications for at least one year or one exam cycle.

Teachers will:

- review syllabus and curriculum framework design and the assessment aims
- learn about any major updates to our syllabuses or curriculum frameworks
- extend their understanding of the assessment process through reviewing past question papers, marking exercises, examiner feedback as well as developing practice questions for Cambridge O Level, Cambridge IGCSE, Cambridge International AS & A Level and Cambridge Pre-U
- explore Progression Tests, Cambridge Primary Checkpoint and Cambridge Lower Secondary Checkpoint
- create schemes of work and curriculum resources
- share a range of approaches to teaching and learning.

Enrichment level

Enrichment Professional Development is for teachers and school leaders who have been teaching or implementing Cambridge programmes and qualifications for at least a year and would like to develop their practice in specific areas. This level of our training encourages teachers to reflect on, and take greater responsibility for their teaching, as well as become more innovative in their classroom practice.

There are three different strands to our offer at this level. Teachers and school leaders can choose to focus on:

- skills, concepts or ideas (subject based)
- skills, concepts or ideas (not subject-based)
- a particular aspect of a syllabus or curriculum framework.

This training is available face-to-face, online or a blend of both.

Examples of Enrichment Professional Development include Active Learning and Assessment for Learning, The Inclusive Classroom, and Developing your Leadership with Cambridge.

For a list of forthcoming courses, as well as details of how to enrol, go to: **http://www.cambridgeinternational.org/cambridge-professional-development/events-and-training-calendar/**

Cambridge Professional Development Qualifications

Cambridge Professional Development Qualifications (Cambridge PDQs) transform professional learning for practising teachers and leaders. They provide formal recognition and reward for a school's commitment to establishing a culture of ongoing teacher and school leader development.

Specifically, Cambridge PDQs:

- meet the needs and priorities of the individual and the school
- scaffold school-based professional development
- enhance professional thinking and practice to improve the quality of learning
- provide international benchmarks for professional learning, leading to valuable certification and progression
- energise professional learning communities.

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For full details of our Professional Development Qualifications, go to:
www.cambridgeinternational.org/pdq

5.3 School improvement services

School Self-Evaluation

Effective schools successfully progress the learning and development of all of their students, regardless of background, beyond their normal expected rate of growth. To support the progress of their students, many schools regularly review their performance to identify ways in which they can become more effective.

As part of this review process, schools often base their evaluations on evidence from practice. This means that any decisions about how to improve school performance are informed by data.

We have developed a range of surveys that form the basis of a school self-review. Schools can use these to collect feedback from the school's key stakeholder groups: parents, students and teachers. Each of the surveys is based around a set of standards for School Self-Evaluation, which have been developed by Cambridge International and tailored specifically for Cambridge schools. The standards are grouped into five key areas, or domains. Each domain contains a set of standards which help to define the features of an effective school.

Once the school has conducted the surveys, Cambridge will produce a report on the results that combines and compares responses from parents, students and teachers. We will then schedule a video conference or face-to-face meeting with the school leadership team. This meeting is an opportunity to discuss the report's findings, decide on any areas for further analysis, and identify the next steps in the school improvement process. For full details visit:
www.cambridgeinternational.org/support-and-training-for-schools/school-improvement/

School consultancy

We can provide local support and guidance for teachers and school leaders involved in implementing the Cambridge curriculum. By working closely together, we are able to respond to specific needs and provide a more personalised experience. We can also help identify solutions or processes to address any specific problems or challenges. For longer term support, we can work together to develop and implement a more formalised programme. Specific areas might include:

- school improvement planning
- improving the quality of teaching and learning
- teacher appraisal and development
- student assessment and tracking
- resourcing the school
- mobilising the school community.

To talk to Cambridge International about further support, please email:
info@cambridgeinternational.org with 'Local support request' in the email subject line.

For more information, see:
www.cambridgeinternational.org/school-improvement

5:4 Expanding the Cambridge offer or becoming a Cambridge school

For Cambridge schools interested in taking on additional Cambridge qualifications and programmes,, please contact us at:
info@cambridgeinternational.org

To find out more about how to become a Cambridge school, please refer to the registration process here:
www.cambridgeinternational.org/i-want-to/join-cambridge/

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Griffin, P., McGaw, B. and Care, E. (Eds.). (2012).
Assessment and Teaching of 21st Century Skills. London, UK: Springer.
See also www.atc21s.org
Schleicher, A. (2011). The case for 21st century learning.

OECD Education Directorate. Accessed 11th November 2012.
www.oecd.org/general/thecasefor21st-centurylearning.htm

Robinson, V. [2007]
The impact of leadership on student outcomes: Making sense of the evidence.
Australian Council for Educational Research. ACER Conference archive.
Accessed on 6th June 2018 at:
https://research.acer.edu.au/cgi/viewcontent.cgi?referer=&httpsredir=1&article=1006&context=research_conference_2007

Robinson, V. [2011]
Student centered leadership.
Jossey – Bass USA.

Vygotsky, L. S. (1978).
Mind in society: The development of higher psychological processes.
Cambridge, MA: Harvard University Press. USA.

References specific to Leadership, curriculum evaluation and building school capacity.

The measuring impact session has drawn extensively on the influential work of the academics John Hattie and Robert Coe. The following resources can be used to develop understanding further:

Hattie, J. (2012).
Visible Learning for Teachers – Maximising Impact on Learning. Routledge.
London and New York.

Coe, R. (2002).
It's the Effect Size, Stupid. What effect size is and why it is important. Paper presented at the Annual Conference of The British Educational Research Association, University of Exeter, England, 12-14 September, 2002. A version of the paper is available online:
http://www.leeds.ac.uk/educol/documents/00002182.htm

The Centre for Evaluation and Monitoring, University of Durham, has produced a very useful effect size calculator: http://www.cem.org/effect-size-calculator. Note that it also calculates a confidence interval for any effect size generated. Confidence intervals are useful in helping you understand the margin for error of an effect size you are reporting for your class. These are particularly important when the sample size is small, which will inevitably be the case for most classroom teachers.

For a further explanation of the concept of 'standard deviation' and its use in statistical analysis: https://en.wikipedia.org/wiki/Standard_deviation

Rachel J. Eells (2011)
Meta-analysis of the relationship between collective teacher efficacy and student achievement. A dissertation submitted to the faculty of the graduate school, in candidacy for the degree of Doctor of Philosophy, Program in Educational Psychology, Loyola University Chicago, Chicago, il. August 2011. Online version can be found here:
https://pdfs.semanticscholar.org/6167/a32cba0f727d72b071df00f8fc2d8b6d8673.pdf

Elements of this chapter can also be found in the *Approaches to Learning and Teaching* series of books published by Cambridge University Press, working with Cambridge Assessment International Education (2017-18):
http://www.cambridge.org/us/education/subject/teaching-practice-and-professional-development/approaches-learning-and-teaching

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Annotated bibliography and other resources

This guide has presented an overview of the issues and questions that you will need to consider in developing your curriculum. In this section we identify a few texts and other resources and links for schools interested in exploring ideas further. We recommend these because they are relevant, research-based and obtainable. They would make a good initial collection for a staff room resource centre easily accessible to all teachers. They are good starting points, from which you can follow your particular interests, but represent only a few of the wide range available. We encourage schools to share any literature and resource material they have found useful through the teacher support community. We have divided texts and resources into sub sections but most cross over boundaries and are relevant to more than one category.

Curriculum planning and Teaching

Approaches to Learning and Teaching series [2017 / 2018]. Various Authors. Cambridge University Press
This series of books have been written in collaboration with Cambridge Assessment International Examinations. Each book focuses on a different subject and gives examples of effective teaching approaches translating theory into practice.
See: http://www.cambridge.org/gb/education/subject/teaching-practice-and-professional-development/approaches-learning-and-teaching

English, F. (2010).
Deciding what to teach and test: Developing, aligning and auditing the curriculum.
3rd Ed. Thousand Oaks, CA: Corwin Press.

Addresses the fundamentals of curriculum design in the context of a standards-based environment, with guidance and useful tools, e.g. for curriculum mapping from a United States perspective.

Flinders, D. and Thornton, S. (2009).
The Curriculum Studies Reader.
3rd Ed. Abingdon: Routledge.

A comprehensive survey of historical and contemporary keynote writing on the curriculum, balanced with concrete examples of innovative curriculum and an examination of contemporary topics, e.g. globalisation.

Kelly, A. V. (2009).
The Curriculum: Theory and Practice.
6th Ed. London: SAGE.

Summarises and explains the main aspects of curriculum theory aimed at experienced readers, and shows how these can and should be translated into practice, in order to create an educational and democratic curriculum for all schools at all levels.

Law, E. and Nieveen, N. (Eds.) (2010).
Schools as curriculum agencies: Asian and European perspectives on school-based curriculum development.
Rotterdam: Sense.

Contemporary concepts of school-based curriculum development and case studies of practice in a range of Asian and European nations, exploring commonalities and differences.

McCormick, R. and Paechter, C. (Eds.) (1999).
Learning and Knowledge.
London: SAGE.

Learning as knowledge construction and the implications of this for the nature of knowledge and for the way it is acquired, e.g. learning within domains and different subject perspectives.

Marsh, C. J. (2009).
Key Concepts for Understanding Curriculum.
4th Ed. Abingdon: Routledge.

An evaluation of major international curriculum concepts and practices including planning, development and management, teaching perspectives, collaborative design and involvement, and ideology.

Myatt, M. (2018)
The Curriculum: Gallimaufry to coherence.
Melton: John Catt Educational Ltd.

An informative, straightforward and concise book whose argument is clear; a proper and demanding curriculum is the entitlement of every child and this book explores how educators can make this a reality. Covering a large amount of information on the curriculum, from cognitive science to individual subject commentaries, this book weaves theory and day-to-day practice together. Anyone involved in curriculum planning would find this a useful resource.

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Priestly, M. and Biesta, G. (2014)
Reinventing the Curriculum. New Trends in Curriculum Policy and Practice.
Bloomsbury Academic.

Divided into two halves the first half of this book focuses on Scotland's Curriculum for Excellence (CfE) with contributions from authors discussing and commenting on its defining aspects of developing responsible citizens, effective contributors, confident individuals and successful learners. In the second half of the book the CfE is placed within an international context to highlight recent trends in curriculum policy. Despite a focus on English speaking countries, this book offers all readers useful ways of thinking critically about the direction and tensions of curriculum policy.

Turner, S. (2016)
Secondary Curriculum and Assessment Design.
Bloomsbury Education.

Written from a UK perspective and drawing on ideas from current UK educationalists, this book offers a step by step approach to designing a curriculum and assessment model at both a whole school and subject level. Reflective questions throughout the chapters aim to consolidate the thinking of the reader regarding areas such as the purpose of a curriculum, its key principles and which key researchers the reader aligns themselves most closely with.

Westbury, I. and Milburn, G. (2007).
Rethinking Schooling.
Abingdon: Routledge.

A critical selection of seminal articles from the Journal of Curriculum Studies by international experts. Themes include classrooms and teaching, pedagogy, science and history education, school and curriculum development, and students' lives in schools.

Wiggins, G. and McTighe, J. (2005).
Understanding by Design.
2nd Ed. Alexandria, VA: ASCD.

A backwards design process in which the curriculum planner starts by identifying clear learning outcomes and relevant facets of understanding, and makes explicit the essential questions to be explored.

Young, M., and Lambert, D. (2014)
Knowledge and the Future School.
New York: Bloomsbury Academic.

This book introduces important arguments about the role of knowledge, the work of schools and what a good education involves. It offers a way of thinking for anyone developing a curriculum and places 'powerful knowledge' as an underlying curriculum principle.

Effective schooling

Brighouse, T. and Woods, D. (1999).
How to improve your school.
Abingdon: Routledge.

Focuses on how ideas and intentions can be turned into direct actions that will help a school improve its performance and effectiveness, looking at effective schools and how they have achieved their goals, leadership within schools, teaching and learning effectively, making critical interventions to secure improvement and how schools involve others to support improvement.

Brighouse, T. and Woods, D. (2008).
What makes a good school now?
London: Continuum.

Draws upon extensive work on school improvement over the last 15 years, and is set in the real context of the many changes and new agendas that are a feature of schools today.

Brown, C. and Poortman, C. (2018)
Networks for Learning. Effective Collaboration for teacher, School and System Improvement.
Abingdon: Routledge

This book explores the nature and impact of Professional Learning Networks (PLNs) evaluating different case studies from the Netherlands, Sweden, UK, Canada, Australia and New Zealand, each case study with a different focus such as research networks to child support teams. Each chapter is dedicated to a case study and designed to get the reader reflecting upon how they would engage with and use networks to enhance and sustain school improvement.

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Crossley, D. (2013)
Sustainable School Transformation. An Inside-Out School Led Approach.
London: Bloomsbury

Argues change comes for within the school itself. This book draws on numerous international case studies from Finland, Canada, Australia, USA and UK to highlight good practice for sustained improvement as well as lessons learnt. Themes discussed include use of data to inform, approaches to accountability and the importance of community.

Coe, R., Aloisi, C., Higgins, S., and Major, L. (2014).
What makes great teaching? Available online at:
https://www.suttontrust.com/wp-content/uploads/2014/10/What-Makes-Great-Teaching-REPORT.pdf

Review of findings from over 200 evidence-based articles.

Hattie, J. (2009).
Visible learning: A Synthesis of over 800 Meta-Analyses Relating To Achievement.
Oxford: Routledge.

Hattie and colleagues have researched the most powerful influences on achievement in schools. This books presents a synthesis of over 800 meta-analyses and is one of the largest collections of evidence about what works in schools to improve learning. See also Hattie, J. (2012). Visible learning for teachers. London: Routledge. See also Hattie, J. (2015) Visible Learning into Action: International Case Studies of Impact.

Knight, O. and Benson, D. (2014)
Creating Outstanding Classrooms. A whole-school approach.
Abingdon: Routledge

A self-titled 'training manual' the focus of this handbook is to develop excellent teaching and learning through teaching for understanding and being acutely aware of the learner experience. Topics range from curriculum planning, language progression and assessment models; case studies help to link the theory to practice.

MacBeath, J. and Mortimore, P. (Ed.) (2004).
Improving School Effectiveness.
Buckingham: Open University Press.

Reviews findings from seminal international work to analyse school effectiveness, its measurement, and impact for teachers, parents and pupils.

Measures of Effective Teaching project (MET)
www.metproject.org/reports.php

A number of resources are available on the website, primarily focused on measuring teaching effectiveness. Research base entirely in the USA.

Mercer, N. and Hodgkinson, S. (Ed.) (2010).
Exploring Talk in School.
London: SAGE.

Classroom talk is essential for guiding the development of understanding and for learners to understand their teachers and their peers in constructing knowledge. This book considers the practical steps teachers can take to develop effective classroom interaction, looking at: classroom communication and managing social relations; talk in science classrooms; using critical conversations in studying literature; exploratory talk and thinking skills; talking to learn and learning to talk in the mathematics classroom; the 'emerging pedagogy' of the spoken word.

Rose, R. (Ed) (2010)
Confronting Obstacles to Inclusion. International responses to developing inclusive education.
Abingdon: Routledge

This book opens up an international dialogue on the challenges of, and approaches to, developing an inclusive education. Each author puts forward their own views, which deliberately introduces varying perspectives and interpretations of inclusion.

Rudduck, J. and Flutter, J. (2004).
How to Improve Your School.
London: Continuum.

Focuses on those who are most affected by changes in education policy and systems – the learners. Based upon and distilling empirical evidence from a number of research projects, this is an account of contemporary schooling from the learners' perspective. The research indicates that we need to see pupils differently, to re-assess their capabilities and reflect on what they are capable of being and doing.

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Bilingualism and learning

Baker, C. (2011).
Foundations of Bilingual Education and Bilingualism.
5th Ed.
Bristol: Multilingual Matters.

A comprehensive introduction to bilingualism and bilingual education, covering all the crucial issues in bilingualism at individual, group and national levels. The 6th edition (2017) updates on technological advances, issues of assessment, identity and bilingualism. There are updated international examples of policy, research and practice.

Chadwick, T. (2012).
Language Awareness in Teaching: A Toolkit for Content and Language Teachers. Cambridge: Cambridge International Examinations and Cambridge University Press.

Aimed primarily at those who teach learners for whom English is not their first language, this Toolkit helps teachers to develop language awareness and support through classroom approaches and coordination with other teachers.

Coyle, D., Hood, P. and Marsh, D. (2010).
CLIL: Content and Language Integrated Learning.
Cambridge: Cambridge University Press.

This is a comprehensive overview of CLIL, from theory to practice, for both language and content-subject teachers, providing guidance on the development of learning activities and materials, teaching approaches, assessment and evaluation.

Cummins, J. and Early, M. (2011).
Identity Texts: The Collaborative Creation of Power in Multilingual Schools.
Stoke on Trent: Trentham Books.

Identity texts describes a variety of creative work by children, led by classroom teachers: collaborative inquiry, literary narratives, dramatic and multimodal performances. This book shows how identity texts have proved to be an effective and inspirational way of engaging learners in multilingual schools around the world.

García, O. (2009).
Bilingual Education in the 21st Century: A Global Perspective.
Oxford: Wiley-Blackwell.

Provides an overview of bilingual education theories and practices throughout the world, and extends traditional conceptions of bilingualism and bilingual education to include global and local concerns in the 21st century. García questions assumptions regarding language, bilingualism and bilingual education, and proposes a new theoretical framework and alternative views of teaching and assessment practices.

Mehisto, P. (2012).
Excellence in Bilingual Education: A Guide for School Principals.
Cambridge: Cambridge International Examinations and Cambridge University Press.

The first guide available to focus on the development and organisation of a bilingual education programme from the perspective of the school leader, providing international perspectives on planning and partners, leadership, learners, teachers and parents. This is a practical guide to support implementation, and evaluation and improvement of practice.

Mehisto, P. and Genesee, F. (2015).
Building Bilingual Education Systems: Forces, Mechanisms and Counterweights.
Cambridge: Cambridge University Press.

In order to provide practical knowledge that is crucial to creating and implementing successful bi/trilingual education systems this book draws on case studies and the lessons learnt from them, practical tools and practitioner stories.

Mehisto, P., Marsh, D. and Frigols, M.-J. (2008).
Uncovering CLIL: Content and Language Integrated Learning in Bilingual and Multilingual Education.
Oxford: Macmillan.

This handbook gives many practical insights into CLIL, at each stage in the cycle of reflective practice, helping teachers to know why and how to facilitate CLIL.

School Leadership

Harris, J., Carrington, S. and Ainscow, M. (2018)
Promoting Equity in Schools. Collaboration, Inquiry and Ethical Leadership.
Abingdon: Routledge

Set against a backdrop of high stakes testing, competition between schools, parental choice and school autonomy in Australia, the agenda of this book is to find ways of promoting equity in schools to break the link between disadvantage and

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educational failure and the implications this has for ethical leadership. The collaborative enquiry builds on international research, shares findings from student voice, use of school data, and examines factors that act as barriers to equity.

Fullan, M. (2007).
Leading in a Culture of Change.
San Francisco: Jossey-Bass.

How leaders in all types of organisations can accomplish their goals and become exceptional leaders. Draws on the most current ideas about and theories of effective leadership, with case examples of change, and analyses five core competencies for successful leadership of complex change: attending to a broader moral purpose; keeping on top of the change process; cultivating relationships; sharing knowledge, and setting a vision and context for creating coherence in organisations.

Macbeath, J. and Cheng, Y. C. (Eds.) (2008).
Leadership for Learning: International Perspectives.
Rotterdam: Sense Publishers.

Considers the impact of globalisation on school leadership and the importance of distributed leadership making schools into learning organisations. Examples are taken from 12 countries in different parts of the world.

MacBeath, J. and Dempster, N. (2009).
Connecting Leadership and Learning: Principles for Practice.
Abingdon: Routledge.

Five key principles for practice, tested by teachers, school leaders and learners, across cultural and language boundaries, are explored in school and classroom practice: a focus of learning; an environment for learning; a learning dialogue; shared leadership; internal and external accountability.

Robinson, V. [2011]
Student centered leadership.
Jossey – Bass USA.

Focuses on leadership that improves student outcomes.

Wiliam, D. (2016)
Leadership for Teacher Learning
Florida: Learning Sciences International

Includes a critique of methods of meta-analysis, explanation of the file-drawer problem and logic models.

Wise, C., Bradshaw, P. and Cartwright, M. (Eds.) (2013).
Leading Professional Practice in Education.

Focuses on leading learning and learner leadership, change processes and distributed leadership, and leading professional development, exploring the application of theory in authentic practice in a range of school contexts.

Assessment and assessment for learning

Black, P. et al. (2003).
Assessment for Learning: Putting it into Practice.
Maidenhead: Open University and McGraw-Hill.

Based on a two-year research project involving 36 teachers in UK schools in Medway and Oxfordshire, the specific assessment for learning practices that teachers found fruitful are described. The underlying ideas about learning illustrated by these developments are explored. The problems that teachers encountered when implementing the new practices in their classroom are discussed, with guidance for school management about promoting and supporting such changes.

Christodoulou, D. (2016)
Making Good Progress? The future of Assessment for learning.
Oxford: Oxford University Press

This book highlights the flaws of assessment and suggests alternative ways of assessing learning and the implications this has on teaching methods. Deliberate practice, a knowledge based curriculum and suggested principles behind formative and summative assessments are some of the areas highlighted in this book.

Education Endowment Foundation (2018)
Metacognition and self-regulated learning guidance report.

An accessible overview of existing research with guidance on how to translate this into practice. This report is for senior leaders and classroom teachers who are interested in how research can improve their teaching.

Gardner, J. (Ed.) (2006)
Assessment and Learning.
London: SAGE.

A comprehensive overview of assessment to support

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learning, practice-based theory on assessment for learning, and formative assessment to support individual development and motivate learners. Research-informed insights and practical examples come from a wide variety of international contexts.

Harlen, W. (2007).
Assessment of Learning.
London: SAGE.

A critical review of how learners' achievements are assessed for a range of purposes, from reporting progress to selection and qualification. It considers the relationship between learning outcomes and assessment, the use of assessment for target setting and evaluation, and the role of teachers' judgements.

James, M. et al. (2007).
Improving Learning How to Learn.
Abingdon: Routledge.

Focuses on the conditions within schools, and across networks of schools, that are conducive to the promotion, in classrooms, of learning how to learn as an extension of assessment for learning.

Murchan, D, and Shiel, G. (2017)
Understanding and Applying Assessment in Education.
London: SAGE

A comprehensive guide on current practice and trends in assessment. Whilst primarily aimed at new teachers, this book is ideal for anyone wanting to get to grips with the nature of assessment in schools. Topics covered range from theoretical constructs of assessment to implementing assessment for learning in the classroom to assessment planning and policy at a whole school level.

Stobart, G. (2008).
Testing Times: The uses and abuses of assessment.
Abingdon: Routledge

Assessment is a social activity is one of the main themes of this book critically discussing a range of assessment practices and their consequences for teaching and learning. Suggestions of how to reclaim assessment and ensure it is used for legitimate reasons conclude this book.

Swaffield, S. (Ed.) (2008).
Unlocking Assessment: Understanding for Reflection and Application.
Abingdon: Routledge.

This book explores the values, principles, research and theories that underpin our understanding and practice of assessment. It provides practical suggestions and examples, and addresses key points about the future development of assessment. Complex but crucial ideas and issues are made accessible, so that teachers can be more confident and proactive in shaping assessment in their classrooms, in ways that support learning and avoid unintentional harmful consequences.

Weeden, P., Winter, J. and Broadfoot, P. (2002).
Assessment: What's in it for Schools?
Abingdon: Routledge.

Shows how theory can best be put into practice, using as little jargon as possible. Issues discussed include: how skills of reflection, self-evaluation and personal target setting can impact on learning; how far learners are able to evaluate their own performance and what schools can do in the short, medium and long term to promote more effective learning.

Wiliam, D. (2011).
Embedded formative assessment.
Bloomington: Solution Tree.

Wiliam outlines five key strategies of formative assessment: clarifying, sharing and understanding learning intentions and criteria for success; engineering effective classroom discussions, activities and learning tasks that elicit evidence of learning; providing feedback that moves learners forward; activating learners' instructional resources for one another; activating learners as the owners of their learning. Through a summary of the research evidence he shows the impact of each of the above strategies, and offers many practical techniques that teachers can use to incorporate the strategies into their classroom practice.

Wylie, E.C. et al. (2012).
Improving formative assessment practice to empower student learning.
Thousand Oaks, CA: Corwin SAGE.

This practical guide can be used by individual teachers or collaboratively as a study guide in a professional learning community. Case studies provide examples of formative assessment in practice, along with examples of teachers implementing changes in their practice. Readers are encouraged to select a specific aspect of formative assessment to investigate, explore relevant personal practice relevant to that aspect, implement necessary changes, reflect on those changes, and continue the change process.

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School evaluation

Hopkins, D. (1989).
Evaluation for School Development.
Buckingham: Open University Press.

Provides a practice-focused guide to school evaluation, its methods, approaches and impact.

MacBeath, J. and McGlynn, A. (2002).
Self-Evaluation: What's in it for Schools?
London: RoutledgeFalmer.

Makes school self-evaluation accessible, and through case studies helps schools and teachers to develop self-confidence in working with evaluation tools. Discusses the concerns and issues of schools to propose challenging ideas for the future.

Ofsted (2012).
School Inspection Handbook (UK).
www.ofsted.gov.uk/resources/school- inspection-handbook
(page 23ff).

In Part 2, the evaluation schedule, grade descriptors for each of the key areas: the achievement of pupils at the school, the quality of teaching in the school, the behaviour and safety of pupils at the school, the quality of leadership in, and management of, the school are given. This might form the basis from which a school could develop its own self-evaluation schedule.

Professional development

Alexandrou, A., and Swaffield S. (Eds.) (2014)
Teacher Leadership and Professional Development.
Abingdon: Routledge.

Both leadership and professional development are central to school improvement. This book brings these two areas together to explore the role of teachers as leaders and raises the question of what difference this makes to student learning. Authors write primarily about their own experiences and research in the UK and USA but a wider international perspective is acknowledged.

Craft, A. (2002).
Continuing Professional Development: A Practical Guide for Teachers and Schools. 2nd Ed.
London: RoutledgeFalmer

For teachers and school leaders to develop understanding of professional and institutional development and of the principles of appraisal and review; to review their own professional development; develop and apply criteria for evaluating the quality and value of professional development; and identify appropriate areas for future development.

Colwell, J. and Pollard, A. (2015)
Readings for Reflective Teaching in Early Education
London: Bloomsbury

This book describes itself as a 'portable library', which is made up from a collection of 88 key readings from important contemporary and seminal publications on early years teaching and learning.

Gilchrist, G. (2018).
Practitioner enquiry: Professional development with impact for teachers, schools and systems.
London: Routledge.

An introduction to all aspects of practitioner enquiry, including case studies from schools.

Hargreaves, A. and Fullan, M. (2012).
Professional Capital: Transforming Teaching in Every School.
New York: Teachers College Press.

Presents action guidelines for classroom teachers and school leaders to transform the culture of teaching and teacher development.

Kennedy, A. (2005)
Models of Continuing Professional Development: a framework for analysis

An analysis of the potential nine models of teacher professional development has for transformative practice and professional autonomy. This article draws on international literature and uses specific examples from Scotland to raise the issues of purpose and power in continued professional development.

Moon, J. (2004).
A Handbook of Reflective and Experiential Learning.
Abingdon: RoutledgeFalmer.

Guide to understanding and using reflective and experiential learning, with practical ideas, tools, activities and photocopiable resources for classroom practice.

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O'Leary, M. (2014)
Classroom observation: A guide to the effective observation of teaching and learning.
London: Routledge

Whilst not a tool-kit as such, this book explores the role of classroom observation in teaching. It is situated within the academic literature, but also including practical techniques.

O'Leary, M. (2017)
Reclaiming Lesson Observation. Supporting excellence in teacher learning.
Abingdon: Routledge.

The contributors to this book come from varying educational contexts in the UK, each putting forward their own experiences of lesson observation. The experiences elaborated upon in this book range from the process of transitioning from graded to un-graded observations, an analysis of observation feedback, suggestions for embedding coaching into the observation process and an evaluation of lesson study. This is a useful book to inform reflections on the purpose and outcomes of current models of observation that take place in schools.

Pollard, A. et al. (2008).
Reflective Teaching.
London: Continuum.

The textbook for reflective classroom professionalism, summarising latest research, analysing key topics and principles, and providing resources for continuing professional development.

Pollard, A. (Ed.) (2002).
Readings for Reflective Teaching.
London: Continuum.

This book is a 'portable library' of 120 essential readings for the reflective practitioner, concerning teaching and learning.

Impact

Bassey, M. (1999).
Case study research in educational settings.
Buckingham: Open University Press.

Introduction to using the case study approach in education.

Baumfield, V., Hall, E., and Wall, K. (2013).
Action research in education: Learning through practitioner enquiry (2nd Edn.).
London: Sage Publications Ltd.

A guide to practitioner enquiry, with examples from teachers and guidance on data collection methods.

Churches, R. & Dommett, E. (2016).
Teacher-led research: Designing and implementing randomised controlled trials and other forms of experimental research.
Camarthen, UK: Crown House Publishing.

A guide to all aspects of conducting RCTs in an education context.

Cohen, L., Manion, L., and Morrison, K. (2017).
Research methods in education (8th ed.).
London: Routledge.

A guide to key data collection methods such as questionnaires and interviews.

Denscombe, M. (2017).
The good research guide for small-scale social research projects (6th Edn).
London: Open University Press.

An introduction to strategies and methods for research.

Education Endowment Foundation (EEF)
https://educationendowmentfoundation.org.uk/

The website summarises research on education initiatives. The DIY evaluation tool gives a step-by-step approach to generating effect sizes. https://v1.educationendowmentfoundation.org.uk/uploads/pdf/EEF_DIY_Evaluation_Guide_(2013).pdf

White, R., and Gunstone, R. (1992).
Probing understanding.
London: The Falmer Press.

Techniques for investigating students' learning in detail.

Yin, R. (2018).
Case study research (6th Edn.).
Los Angeles: Sage.

A guide to all aspects of case study research, including use in evaluations.

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Active learning

Learning which engages students and challenges their thinking, using a variety of activities.

Assessment for learning

Essential teaching strategies during learning to help teachers and students evaluate progress in terms of understanding and skill acquisition, providing guidance and feedback for subsequent teaching and learning.

Backwash effect

The impact of an examination on teaching and learning, by influencing the design of the learning programme and activities.

Balanced curriculum

A school curriculum with a complementary range, combination and weighting of subjects. This normally includes mathematics, languages, sciences, technology, humanities, creative arts and physical education.

Benchmarking

Measuring performance against an established standard.

Bilingual education

Teaching and learning in two or more languages, developing both subject and language knowledge and skills.

Broad curriculum

Every student experiences a wide range of different subjects and learning activities.

Cambridge community

Schools using Cambridge educational programmes [currently about 10,000 schools worldwide, located in approximately 160 countries].

Cambridge Handbook

The official document detailing the regulations for running Cambridge examinations and assessments. It details the responsibilities of Centres and forms part of the customers' contract with Cambridge.

Co-curriculum

Valued educational activities that support learning beyond the school curriculum, which the school encourages and supports.

Component

A component is an assessable part of a subject examination, not certificated as a separate entity, e.g. a written paper or a practical.

Concept

A mental representation of a class of things. A concept may refer to concrete or abstract things.

Content and language integrated learning (CLIL)

In a CLIL approach to bilingual education, students develop their subject knowledge and language skills at the same time using specific teaching and learning strategies.

Core subject

A subject which is an essential part of the curriculum, typically English, Mathematics and Science.

An alternative meaning is a subject (like Global Perspectives) which becomes a focus of learning in other subjects enhanced by interdisciplinary approaches and connections with other subjects.

Coursework

Classroom assignments undertaken by learners as prescribed in the syllabus. Normally assessed by the learner's teacher according to criteria set by Cambridge. The work is moderated within the school and then by Cambridge.

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Creative development
Enabling learners to develop their imagination and original thinking in solving problems and producing ideas, images, artefacts, performances and actions which have value to themselves and others.

Critical thinking
The ability, underlying all rational discourse and enquiry, to assess and evaluate analytically particular assertions or concepts in the light of either evidence or wider contexts.

Curriculum
An overall description of the aims, content, organisation, methods and evaluation of the learning programme and the factors influencing the quality of learning.

The term curriculum is often used in different contexts and different ways (please see page 5 for examples).

Curriculum framework
The systematic structure of the curriculum as set out in document(s) specifying the way in which learning and assessment is to be organised.

Curriculum mapping
Documents all the interrelationships within the curriculum, e.g. what is to be learned, how and when.

Differentiated learning
Adapting one's teaching to suit the needs of different learners for their current level of understanding and performance, by providing appropriate learning activities, support, and assessment, so that all students in the group can learn effectively (see 'Scaffolding learning').

Directed study
Learning in which the teacher as expert authority sets out and transmits the knowledge to be learned.

Distributed leadership
Builds capacity in schools by giving teachers the responsibility for leading in areas of pedagogy, curriculum development and the social and emotional wellbeing of learners.

Dual qualifications
Cambridge and national qualifications.

Educational aims
Statements of the broad purposes or intentions of the curriculum or learning programme.

E-learning
Learning that takes place using electronic media, for example online.

ESOL
English for speakers of other languages.

Exams officer
The person appointed by the principal to act on behalf of the school with responsibility for the day-to-day administration of its Cambridge examination cycle.

Experienced curriculum
What students actually learn from their whole educational experience, including both planned and unintended outcomes, as a result of all their activities in the learning environment.

First language
The language that the learner mainly uses, from childhood and at home.

Formal assessment
Planned and structured measurement of learning.

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Formative assessment

Provides students with developmental feedback on their progress during the learning programme and informs the design of their next steps in learning.

Guided learning hours

The average amount of teacher-learner contact time a school typically needs to allocate for students to be well-prepared for a qualification.

Higher education

Courses in universities and colleges beyond upper secondary school, e.g. degrees.

Impact

The effect that one thing has on another thing. In schools, this could be the effect a new marking technique has on student progress.

Inclusion

Refers to integrating learners in the regular school system (and class) as opposed to placing a learner in a special school or class. Learners with special educational needs are provided with the technical, assistive or personal supports needed.

Interpersonal skills

Skills used to interact effectively with people on a day to day basis, e.g. communication, empathy

Intrapersonal skills

Skills used to reflect on, manage and develop your own thinking, behaviour and progress.

Long-term planning

Preparation for learners' progress and development over a year or more.

Management cycle

An iterative process in which school leaders set goals, implement actions, monitor and evaluate progress and outcomes in relation to the school's strategic plan.

Metacognition

In simple terms, metacognition is being aware of and in control of one's own mental processes.

Mission statement

A formal statement of the education purpose of the school.

Moderation

The process of checking that assessment standards have been applied correctly, consistently and fairly, and making adjustments if necessary to ensure that all assessments are aligned to the standards.

Multi-levelling

Assessments specifically targeted at different levels of ability.

Multilingual curriculum

Specifies subjects that will be taught in either English or the native language(s).

Non-staged assessment

All the assessment components are taken in one examination session.

Partnership in learning

Active and sustained cooperation between individuals and between institutions to achieve clear shared aims and objectives.

Pedagogy

The theory and practice of teaching and learning.

Pre-university qualifications

Provide the preparation and recognition for entry into higher education, e.g. Cambridge International A levels.

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Professional development (PD)

Teachers continuously and systematically reflect on and improve their professional thinking and practice, engaging in appropriate learning opportunities to improve and upgrade their knowledge and skills.

Programme of study

A planned schedule of teaching and learning activities, relating to the curriculum framework and qualification.

Progression route

Movement of the student from one stage of learning to another in a systematic and planned sequence.

Psychomotor development

Learning and developing skills incorporating physical movement and coordination.

Qualification

The formal certificated recognition of a student's achievement at the end of a particular course, based on successful performance demonstrated through assessed evidence.

Reflective practice

The process through which the teacher continuously learns from the experience of planning, practice, assessment and evaluation and can improve the quality of teaching and learning over time.

Scaffold learning

The teacher provides appropriate guidance and support to enable students to build on their current level of understanding progressively to acquire confidence and independence in using new knowledge or skill.

Scheme of assessment

The set of examination components through which a learner's achievement in relation to a particular qualification is determined.

Scheme of work

A set of planned units of learning relating to a topic, subject or stage.

School curriculum

Refers to the combination of subjects studied within a school year and in sequential years as the learner moves through the educational system provided by the school.

Second language

A language other than the national or official language of a country.

Self-regulation

The ability to monitor and control our own thoughts, emotions and behaviour.

Shared subject curriculum

Students study selected subjects in both the first language and in English which could lead to the awarding of both national and Cambridge qualifications.

Spiral approach

Areas of learning are revisited systematically within a planned curriculum so that the learner can engage in more depth and detail and acquire related knowledge and skills.

Split curriculum

Students study two curricula, some subjects are studied as part of the national curriculum and others as part of an international curriculum.

Staged assessment

Assessments are arranged throughout the period of learning.

Student-centred learning

In designing the learning activities, the teacher focuses on the needs, abilities and interests of the learner in relation to the learning outcomes.

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Subject curriculum

The content and skills contained within a syllabus applied across sequential stages of student learning. These stages normally refer to school year levels, and therefore a particular age of learner.

Teacher Support

The framework of courses, resources and guidance that Cambridge provides to help teachers develop their understanding of and practice with Cambridge programmes.

Timetable

A schedule listing the times and durations of lessons across a specific period of time, often a week. This is sometimes referred to as the teaching schedule.

Vision

The school's vision is a compelling sense of the future direction of the school that should be widely shared and inspire commitment.

Zone of proximal development

The difference between what a learner can achieve when they receive expert support and what they can achieve independently.

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School years and age ranges

In this guide we refer to school years. The table below gives you an idea of how these school years correspond to learner ages from a sample of school systems in different countries.

Age	UK school year system	Malaysia school year system	New Zealand school year system	Pakistan grade system	US grade system
0–4	Nursery/Pre-school	Pre-school playgroup	Early childhood education	Pre-school	Pre-kindergarten 3-4
4–5	Reception	Kindergarten	Early childhood education	Pre-school	Pre-kindergarten 4-5
5–6	Year 1	Kindergarten	Year 1	Grade 1	Kindergarten
6–7	Year 2	Standard 1	Year 2	Grade 2	Grade 1
7–8	Year 3	Standard 2	Year 3	Grade 3	Grade 2
8–9	Year 4	Standard 3	Year 4	Grade 4	Grade 3
9–10	Year 5	Standard 4	Year 5	Grade 5	Grade 4
10–11	Year 6	Standard 5	Year 6	Grade 6	Grade 5
11–12	Year 7	Standard 6	Year 7	Grade 7	Grade 6
12–13	Year 8	Form 1	Year 8	Grade 8	Grade 7
13–14	Year 9	Form 2	Year 9	Grade 8	Grade 8
14–15	Year 10	Form 3	Year 10	Grade 9	Grade 9
15–16	Year 11	Form 4	Year 11	Grade 10	Grade 10
16–17	Year 12	Form 5	Year 12	Grade 11	Grade 11
17–18	Year 13	Form 6	Year 13	Grade 12	Grade 12

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Cambridge IGCSE subjects with alternative courses

The list below details the subjects we offer with a number of alternative courses. For example, in mathematics we offer a Cambridge IGCSE with an investigation paper and one without. This flexibility means you can select the course that best meets your learners' needs. Some of our alternative subject courses have particular restrictions (barred combinations) when it comes to the exams.

Cambridge IGCSE science courses
Cambridge IGCSE Combined Science
Cambridge IGCSE Co-ordinated Sciences (Double award)
Cambridge IGSCE Biology
Cambridge IGSCE Chemistry
Cambridge IGCSE Physics
Cambridge IGCSE Physical Science
Cambridge IGCSE Agriculture
Cambridge IGCSE Environmental Management
Cambridge IGCSE Food & Nutrition
Cambridge O Level science courses
Cambridge O level Physics
Cambridge O level Chemistry
Cambridge O level Biology
Cambridge O level Combined Science
Cambridge O level Agriculture
Cambridge O level Food & Nutrition

Cambridge O Level science courses
Cambridge O level Physics
Cambridge O level Chemistry
Cambridge O level Biology
Cambridge O level Combined Science
Cambridge O level Agriculture
Cambridge O level Food & Nutrition
Cambridge IGCSE mathematics courses
Cambridge IGCSE Mathematics
Cambridge IGCSE Mathematics - Additional
Cambridge IGCSE International Mathematics
Cambridge O Level mathematics courses
Cambridge O Level Mathematics
Cambridge O Level Mathematics - Additional
Cambridge IGCSE computing courses
Cambridge IGCSE Computer Science
Cambridge IGCSE Information and Communication Technology
Cambridge O Level computing courses
Cambridge O Level Computer Science

For a full list of the subjects, including different language options, we offer across our programmes and qualifications please see the latest Cambridge prospectus available at www.cambridgeinternational.org

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Student Self-Efficacy Questionnaire

Read the statements below and circle the response that best describes you. Be honest.
There are no right or wrong answers. Please keep for reference at a later date.

Student name: Class: Date:

	0 = Not like me at all 1 = A little like me		2 = Like me 3 = A lot like me	
1. I can learn what is taught in the class.	0	1	2	3
2. I can succeed at anything if I try hard enough.	0	1	2	3
3. If I practised every day, I could develop any skill.	0	1	2	3
4. Once I have decided to accomplish something that is important to me, I keep trying, even if it is harder than I originally thought.	0	1	2	3
5. I am confident that I will achieve the goals that I set for myself.	0	1	2	3
6. When I am struggling and taking longer to complete something that I find difficult, I focus on my learning and change approach, instead of feeling discouraged	0	1	2	3
7. I will succeed in whatever career path I choose.	0	1	2	3
8. I will succeed in whichever college/university course I choose.	0	1	2	3
9. I believe hard work always pays off in the end.	0	1	2	3
10. My ability/capacity grows with effort and hard work I am prepared to put in.	0	1	2	3
11. I believe that the brain can be developed, just like a muscle.	0	1	2	3
12. I think that, no matter who you are, you can significantly improve your level of capability.	0	1	2	3
	Total =			

Glossary

i. Ability: talent, skill, or proficiency in a particular area.
ii. Goal: the object of a person's ambition or effort; an aim or desired result.
iii. Skill: the ability to do something well; expertise.
iv. Capability: the power or ability to do something.

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Teacher Self-Efficacy Questionnaire

Read the statements below and circle the response that best describes you. The statements have been phrased to encourage you to think about your current approach or attitude towards them. Be honest, therefore, and, remember, there are no right or wrong answers. Please retain for reference at a later date.

Teacher name: Date:

	0 = Nothing 1 = Some influence		
1. How much, in your current practice, do you feel you can support the students in your class that are having the most difficulty?	0	1	2
2. How much, in your current practice, do you feel you can help your students think critically?	0	1	2
3. How much, in your current practice, do you feel you can motivate students who show little or no interest in school work?	0	1	2
4. How much, in your current practice, do you feel you can help students believe they can do well in school work?	0	1	2
5. How well, in your current practice, do you feel you respond to difficult questions from your students?	0	1	2
6. How much, in your current practice, do you feel you can help your students value learning?	0	1	2
7. How much, in your current practice, do you feel you can gauge/measure student understanding of what you have taught?	0	1	2
8. To what extent, in your current practice, do you feel you can craft effective questions for your students?	0	1	2
9. How much, in your current practice, do you feel you can do to foster student creativity?	0	1	2
10. How much, in your current practice, do you feel you can do to improve the understanding of a student who is struggling?	0	1	2
11. How much, in your current practice, do you feel you can do to adjust your lessons to the appropriate level for individual students?	0	1	2
12. To what extent, in your current practice, do you feel you can use a variety of assessment strategies?	0	1	2
13. To what extent, in your current practice, do you feel you can provide an alternative explanation when students are confused?	0	1	2
14. How much, in your current practice, do you feel you can assist families in helping their children do well in school?	0	1	2
15. How well, in your current practice, do you feel you can implement a variety of active learning strategies?	0	1	2
16. How well, in your current practice, do you feel you can provide appropriate challenges for high-achieving students?	0	1	2
	Total =		

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Cambridge Standard Terms of School Registration

1 Length of Agreement

1.1 The agreement between the District with respect to the School and Cambridge (the "**Agreement**") will come into effect on the Commencement Date. It is understood that any rights or privileges granted under this Agreement are granted to the District solely with respect to the School, and not with respect to any other schools or facilities administered, controlled or owned by the District.

1.2 The Agreement will continue until and including the first 30th of September after the Commencement Date (the "**Initial Term**") whereupon, subject to Clause 1.4, it shall continue thereafter for a further period of twelve (12) months from the 1st of October in that and each subsequent year, unless terminated earlier in accordance with Clause 12. Each subsequent year following the Initial Term shall constitute a separate term (the "**Extended Term**") and separate agreement. In no event may this Agreement be extended beyond the maximum term, if any, permitted for contracts of this type under applicable law.

1.3 Cambridge may, at its sole discretion, issue new Cambridge Standard Terms of School Registration at the commencement of each [1] Extended Term, which shall become the governing terms of this Agreement. The District shall be entitled to reject the new Agreement by written notice to Cambridge within thirty (30) days of the date of publication of such new Cambridge Standard Terms of School Registration, and this Agreement shall terminate immediately upon receipt of such notice. Should Cambridge not receive any such written notice within thirty (30) days of the date of publication of such new Cambridge Standard Terms of School Registration, the new amendments shall be deemed accepted.

1.4 For the avoidance of doubt, if a School fails to meet the registration quality standards for a School, as may be defined by Cambridge from time to time, Cambridge may at its discretion choose either (a) withdraw registration from the School not meeting quality standards, while continuing registration for any other School within the District that continues to meet quality standards, all without terminating this Agreement (b) not to renew this Agreement at the inception of each renewal or (c) to terminate this Agreement earlier in accordance with Clause 12.

1.5 [2] This Agreement contains the entire agreement between the District and Cambridge and

Summary of Comments on Microsoft Word - v.1 Broward Cambridge US Standard Terms of School Registration (Sep 2023)

Page: 1

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:15:06 AM -04'00'

Number: 2 Author: Rachel Cabrera Subject: Comment on Text Date: 12/2/2025 4:27:10 PM

The provisions of the Handbook are hereby fully incorporated into and form part of the Agreement.. Per Email 12/2/25

supersedes and extinguishes all previous agreements, promises, assurances, warranties, representations and understandings between them, whether written or oral, relating to its subject matter, and the provisions of the following documents, as may be amended from time to time without notice by Cambridge (or by CEM in the case of the CEM EULA), are hereby fully incorporated into and form part of the Agreement:

1.5.1 terms of this Agreement (the "**Terms**")

1.5.2 the Handbook;

1.5.3 the Letter of Approval and any addenda or annexes thereto;

1.5.4 the relevant Fees List;

1.5.5 if any Learners are to take CEM assessments, the CEM End-User Licence Agreement for Monitoring Systems (the "CEM EULA") will apply. The CEM EULA can be accessed through the following hyperlink: https://www.cem.org/gdpr . Accessing and using the CEM assessments will be considered acceptance of the CEM EULA; and,

1.5.6 such other regulations, policies, and notices as issued by Cambridge from time to time.

1.6 If for any reason Cambridge has not issued the District with any of the documents listed in Clause 1.5, the District must contact Cambridge immediately for a replacement.

1.7 Each party agrees that it shall have no remedies in respect of any statement, representation, assurance or warranty (whether made innocently or negligently) that is not set out in this Agreement. Each party agrees that it shall have no claim for innocent or negligent misrepresentation or negligent misstatement based on any statement in this Agreement.

1.8 These standard terms will be interpreted in accordance with Clause 18.

2 Obligations of the District

2.1 The District confirms it has received, read and understood the materials listed in Clause 1.5 prior to the Agreement being formed.

2.2 The District represents and warrants to Cambridge that (a) it has provided to Cambridge all available written materials and guidance regarding procurement policies applicable to the District, and (b) it has complied with requirements and procedures to be complied with or performed by the District related to procurement and in particular related to competitive bidding and exemptions thereto.

Number: 1	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:19:57 AM
Number: 2	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:22:51 AM
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Number: 4	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:22:25 AM
Number: 5	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:20:05 AM
Number: 6	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:20:11 AM
Number: 7	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:22:17 AM
Number: 8	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:20:30 AM
Number: 9	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:22:12 AM
Number: 10	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:20:22 AM
Number: 11	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:20:46 AM
Number: 12	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:20:41 AM
Number: 13	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:20:55 AM
Number: 14	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:21:00 AM
Number: 15	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:21:42 AM
Number: 16	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:21:34 AM
Number: 17	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:21:24 AM
Number: 18	Author: Rachel Cabrera	Subject: Cross-Out	Date: 11/14/2025 9:21:12 AM

2.3 The District will:

2.3.1 carry out its obligations as set out in the Agreement, ~~including all documents referred to in Clause 1.5, and~~ in particular will carry out the duties of a Centre, with respect to the School, as set out in the Handbook;

2.3.2 hold and administer the Syllabuses and Assessments at the School's Premises in accordance with the Agreement and in particular, the Handbook;

2.3.3 obey Cambridge's reasonable instruction in particular in relation to security arrangements relating to Assessments and the administration of Assessments generally;

2.3.4 not engage in any conduct which, in the opinion of Cambridge is or could be prejudicial to the business or marketing of Cambridge's products and services;

2.3.5 obtain and keep in place the relevant licenses and permissions necessary in the country and region in which the District or School is located in order to perform its obligations under the Agreement; and,

2.3.6 comply with all laws, statutes, and regulations of a governmental nature applicable in the country and region in which the District or School is located relating to the operation of the School and the administration of the Assessments; and

2.3.7 comply with all policies as issued by Cambridge from time to time, including without limitation any policies on data protection, child protection, health and safety and fire safety.

2.4 The District is not entitled to offer the Syllabuses or the Assessments to any school or facility administered, controlled or owned by the District, other than the School, nor to any third party directly or through any sales agent, school, sub-licensee or third party.

2.5 In the event of a breach of Clause 2.3, Cambridge will have, without prejudice to any other right or remedy available to it in law or in equity, the right to treat this as a material breach incapable of remedy for the purposes of Clause 12.2.

2.6 The District will provide Cambridge with a full list of all the School's Premises within fourteen (14) days of the Commencement Date and will not be entitled to offer the Syllabuses or the Assessments at any other location without Cambridge's prior written permission.

2.7 ~~The District acknowledges that Cambridge shall list the School and the approved School's Premises as a Cambridge International School and/or Cambridge Early Years Centre (as applicable) on Cambridge's external website, to enable prospective parents to view all~~

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 11/14/2025 9:24:42 AM

Number: 2 Author: Rachel Cabrera Subject: Comment on Text Date: 12/2/2025 4:27:31 PM
including the Handbook Per email 12/2/2025

Number: 3 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:18:24 AM -04'00'

Number: 4 Author: Rachel Cabrera Subject: Sticky Note Date: 10/29/2025 9:21:14 AM -04'00'
Per Section 20 of the Sample Contract

approved Cambridge Schools.

2.8 The District will supply Cambridge and its Representatives with such information and support as may be reasonably required by Cambridge, and without cost to Cambridge, and allow Cambridge and its Representatives to audit and inspect extracts of the records and files of the District in relation to the School in such manner as Cambridge sees fit for the purpose of ensuring the District is complying with its obligations under the Agreement.

2.9 The District will permit Cambridge and its Representatives to enter and conduct inspections in accordance with the Handbook.

2.10 In the event that the District withdraws from its role in delivering an Assessment, the District shall take all reasonable steps to protect the interests of Learners.

3 Rights and Obligations of Cambridge

3.1 ~~Cambridge will provide the Services for the duration of the Agreement in accordance with the terms of the Agreement. Cambridge warrants that the Services will conform to this Agreement and the Handbook.~~

3.2 ~~Cambridge may list details of the School (including the School's full name and the physical address at all of the School's Premises) on Cambridge's external website. The list shall contain details of all Cambridge International Schools and Cambridge Early Years Centres registered with Cambridge from time to time.~~

3.3 Cambridge will be entitled at its absolute discretion, and without liability to the District, to alter the form, style, content or substance of the Syllabuses, Assessments, Qualifications and Certificates.

3.4 ~~Cambridge will be entitled at its sole discretion and at any time to alter any of the documents set out in Clause 1.5.~~

3.5 ~~Cambridge shall benefit from the rights set out in this Agreement, and in particular those rights set out in the Handbook.~~

4 Payment

4.1 ~~The District will pay the Fees to Cambridge in accordance with this Clause 4.~~

4.2 ~~The District shall:~~

4.2.1 ~~pay all fees as stated on the Fees List;~~

4.2.2 ~~pay for any additional services purchased through any password-protected Cambridge website; and~~

4.2.3 ~~pay any fees in respect of any invoices that Cambridge issues to the District from time to~~

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:28:12 AM -04'00'

Number: 2 Author: Rachel Cabrera Subject: Comment on Text Date: 11/3/2025 11:30:36 AM

Add- The District will comply with the request on the condition that all safety and security protocols remain in place protecting parents, guardians and students.

Number: 3 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:28:28 AM -04'00'

Number: 4 Author: Rachel Cabrera Subject: Comment on Text Date: 11/3/2025 11:29:54 AM

Add- The District will comply providing that Cambridge is in compliance with insurance requirements and Tennessee Code Annotated, 49-5-413.

Number: 5 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:28:47 AM -04'00'

time, in accordance with the terms of the invoice.

4.3 The District agrees to pay all invoices from Cambridge by the due date identified on the invoice unless no such date is stated on the invoice, in which case, the District shall pay the invoice within thirty (30) days of the invoice date.

4.4 The Fees List may be published by Cambridge on CIE Direct, emailed to the District or provided in hard copy. In all cases, this will be deemed sufficient notice to the District of the Fees contained in the Fees List.

4.5 If the District fails to pay any sum due by the due date then Cambridge will be entitled, without prejudice to any other right or remedy it may have, to:

4.5.1 cancel or suspend the delivery of the Services, provided Cambridge will have given fourteen (14) days written notice thereof; and,

4.5.2 charge the School interest at a rate of eight per cent (8%) above the Bank of England's base rate per annum from time to time or the maximum rate permitted by applicable law, whichever is less, payable daily from the date payment was due until payment is made; or

4.5.3 terminate the Agreement.

4.6 The District will make all payments in such manner as may be agreed in writing by Cambridge and the District from time to time or if no such agreement is stated, then by electronic transfer to such bank account as may be notified by Cambridge to the District from time to time.

4.7 The parties agree that the District will bear all costs that are due or payable to any national, provincial or municipal authority in relation to the Agreement.

4.8 Each payment payable to Cambridge hereunder will be paid by the District without any right of set-off or deduction for any Taxes.

4.9 In the event that the District is obliged to withhold any part of the sums due to Cambridge, including but not exclusively for tax, the amount of the payment due to Cambridge will be increased such that the sum received by Cambridge will be that which it would have received had there been no such withholding.

4.10 Notwithstanding Clauses 4.8 and 4.9, the District will:

4.10.1 remit to the appropriate tax authorities, in a timely manner, all Taxes required to be withheld from payment to Cambridge; and,

4.10.2 provide Cambridge with an official receipt

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:29:07 AM -04'00'

issued by such authorities for payment of such Taxes within thirty (30) days of such payment.

4.11 For the avoidance of doubt, any delay (regardless of how long) by Cambridge in issuing any invoice to the District will not limit or extinguish Cambridge's right against the District to recover any unpaid Fees or other charges due to Cambridge.

5 Data Protection

5.1 For the purposes of this Agreement, the District is engaging Cambridge as a "**School Official**", as defined in 34 CFR § 99.31(a)(1)(i)(B), to perform the Services on behalf and at the direction of the District. In view of the foregoing, and in relation to the provision of the Services, the District may provide, or direct Cambridge to receive or create documents or data that may include Personal Information of Learners such as records, files, or other Learner Data that could, alone or combination, identify an individual Learner (collectively "**Educational Records**"). As used in this Agreement, the term Educational Records does not include data, documents, or other information that has been de-identified, or is, or has been rendered, anonymous.

5.2 The District is the controller of the Educational Records processed by Cambridge for the purposes of providing the Services as a School Official under this Agreement, and, as controller of such data, the District is responsible for providing any documents, data, or information required for the performance of the Services in a manner that complies with applicable data protection laws. In addition to the above, each Party undertakes that it will comply with all applicable federal and local student data privacy laws in the processing of Learner Data or Educational Records as may be required for the performance of its obligations under this Agreement, including the Family Educational Rights and Privacy Act.

5.3 Notwithstanding the foregoing, Cambridge will also comply with the United Kingdom Data Protection Act 1998, 2018 and the General Data Protection Regulations (EU) 2016/679 (together, the "**Data Protection Legislation**") in the processing of Personal Information, as well as "**Personal Data**" and "**Sensitive Personal Data**" each as defined in the Data Protection Legislation, insofar as such processing is subject to the Data Protection Legislation and is necessary in order for Cambridge to fulfil its obligations under the Agreement. Further, Cambridge will comply with the provisions regarding data protection contained within the Handbook.

5.4 All Learner Data and Educational Records are and will remain the property of the District. In its role as a School Official, Cambridge will receive, collect, and use such data under the control and direction of the District for the

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purpose of providing the Services and otherwise fulfilling its obligations under this Agreement.

5.5 Cambridge is prohibited from selling Learner Data or Educational Records, or otherwise using or disclosing the same to third parties for advertising or general commercial purposes. Further, Cambridge will not disclose Learner Data or Educational Records to any third parties unless or until directed to do so by the District or a Learner. Cambridge will notify the District of any third party requests for access to Learner Data or Educational records, and will refer any such third party requests to the District. The District will fully co-operate and provide all assistance reasonably requested by Cambridge in order to enable Cambridge to respond to any third party request for access to Learner Data or Educational Records, including requests made under the Data Protection Legislation. The obligations in this Clause will continue following termination of this Agreement however caused. Cambridge is authorized to share Learner Data with Learners, and in the case of minors, with Learner's legal guardians subject to applicable law. Cambridge is authorized to send Learner Data to certain scholarship-awarding institutions, universities, colleges or other higher education institutions at the request of Learner, and in the case of minors, at the Learner's legal guardian's request.

5.6 Notwithstanding the above, Cambridge may use or disclose de-identified or anonymous data for the purposes of research, development, and improvement of the Services. In such case, Cambridge agrees that it (a) will not attempt to re-identify any de-identified or anonymous data, and (b) will not disclose any de-identified or anonymous data to any third party unless that third party has agreed in writing not to attempt to re-identify the de-identified or anonymous data.

5.7 Each Party will use commercially reasonable efforts to secure all Learner Data and Educational Records in its possession or control, including ensuring that persons handling such data have sufficient skills, training, and authorization to do so. Further, each Party will (a) promptly notify the other if it becomes aware of or suspects any unauthorized use or disclosure of the Learner Data or Educational Records in either Party's possession or control, and (b) will assist the other Party in any efforts to investigate and respond to any such unauthorized access or use as is reasonably necessary.

5.8 Cambridge is entitled to terminate this Agreement on notice if the District breaches any of its obligations in this Clause.

5.9 The provisions of this Clause survive

Number: 1 Author: Rachel Cabrera Subject: Comment on Text Date: 11/3/2025 11:31:24 AM
Change- Either party is entitled to terminate this Agreement on notice if there is a breach in any of its obligations in the Clause.

termination or expiry of this Agreement.

6 Marketing of the Syllabuses and Assessments

6.1 The District may promote and market the Syllabuses and the Assessments within the geographical boundaries of such District according to the terms set out in the Handbook as amended from time to time or in such manner as Cambridge may reasonably agree.

6.2 In connection with the promotion and marketing of the Syllabuses and the Assessments, the District will:

6.2.1 make clear, in all its dealings, and in particular with parents, Learners and prospective Learners, its relationship with Cambridge, including that the District is not acting as an agent for Cambridge;

6.2.2 provide Cambridge with copies of updates to any promotional materials containing reference to Cambridge or the Assessments (with accompanying English translation where the materials are created in any other language) prior to use;

6.2.3 limit any promotional material containing reference to Cambridge or the Assessments to those Qualifications specified and authorised by Cambridge for the District to offer; and

6.2.4 ensure that all such promotion and marketing complies with this Clause 6.

7 Publicity and Branding

7.1 The District and its Staff shall not, other than in accordance with the Handbook or otherwise without the prior written consent of Cambridge, use Cambridge's name or brand in any promotion or marketing or announcement or the endorsement of the Services.

7.2 In the event of a breach of this Clause 7, Cambridge will have, without prejudice to any other right or remedy available to it in law or in equity, the right to treat this as a material breach incapable of remedy for the purposes of Clause 12.2.1

8 Intellectual Property

8.1 The District acknowledges and agrees that all Intellectual Property Rights in the name Cambridge Assessment, Cambridge Assessment International Education, Cambridge English Language Assessment, University of Cambridge, and all associated symbols, markings and logos, and in the Syllabuses, Assessments, Certificates, Courses, Qualifications, Materials and any other data or other documents or information produced or owned by Cambridge are and will remain vested in Cambridge.

8.2 The District may not reproduce the

Assessments, Syllabuses or Materials except as specifically authorised by Cambridge.

8.3 The District acknowledges and agrees that the licence to use Cambridge Intellectual Property Rights as set out in the Handbook is limited to the programmes and Qualifications specified in the ~~Letter of Approval~~ and for no other purpose.

8.4 The District acknowledges and agrees that the word "Cambridge" in the context of education is synonymous and associated with Cambridge Assessment International Education and its parent undertaking, namely Cambridge University Press & Assessment, a division of the University of Cambridge, and that by entering into the Agreement, the District expressly and specifically assigns any interest it has or may have in the word or use of "Cambridge" to Cambridge.

8.5 The District will not use Cambridge's Intellectual Property Rights or the Cambridge Marks generally, other than as expressly provided in the Handbook.

8.6 In the event that the District fails to comply with this Clause 8, Cambridge may terminate the Agreement by notice in writing with immediate effect and may at its option, seek injunctive relief or damages.

9 Confidentiality

9.1 All Confidential Information will remain the property of Cambridge, and all Educational Records will remain the property of the District. At the expiration or termination of this Agreement, the District shall return all Confidential Information to Cambridge, together with all copies and translations thereof, and Cambridge will return all Educational Records and Learner Data to the District, except that Cambridge may retain certain copies thereof for the purposes of assessment validation as well as providing such Educational Records or Learner Data, at the direction of the District, to third parties including but not limited to colleges, universities, or other institutions for admissions purposes.

9.2 The District will not during the duration of the Agreement nor thereafter disclose or use any Confidential Information save to the extent as may be reasonably necessary for the fulfilment of its duties and obligations under the Agreement or as may be required by law.

9.3 Except as it may be directed to do so by the District, and in accordance with Clause 5, above, during the duration of this Agreement and continuing thereafter, Cambridge will not disclose any Learner Data or Educational Records publicly or to any third party except where such disclosure is reasonably necessary

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:30:40 AM -04'00'
Contract

for Cambridge to fulfil its duties and obligations under this Agreement, or as may be required by law.

9.4 The District will not, either from the date of the Agreement and any time thereafter, divulge or communicate or permit to be disclosed or communicated to any unauthorised person, company, business entity, the media/social media or any other organisation or person, any aspect of any complaint, investigation or corrective action involving or taken by Cambridge or any other Confidential Information.

10 Freedom of Information

10.1 The parties acknowledge that Cambridge is subject to the requirements of the UK Freedom of Information Act 2000 as amended from time to time (the "FOIA") and the District agrees that it shall provide all necessary assistance as may be reasonably requested by Cambridge at its own expense to enable Cambridge to comply with its obligations under the FOIA.

10.2 Notwithstanding the generality of Clause 10.1, the District shall provide Cambridge within 5 Business Days of receipt of a request for assistance with such information in its possession or power as may be reasonably requested in order to assist Cambridge to comply with its obligations under the FOIA.

11 Indemnity and Liability

~~11.1 The District shall, to the maximum extent permitted by applicable law, defend, indemnify and keep indemnified Cambridge and its officer, directors, employees and agents from and against all claims, demands, actions and proceedings made or brought against Cambridge and all damages, losses (including loss of profit and loss of reputation, loss or damage to property, injury to or death of any person and loss of opportunity to deploy resources elsewhere), expenses, liabilities, judgements, settlements, damages and costs (including interest, penalties and legal and other professional costs and expenses) whether or not foreseeable at the date of entering into this Agreement incurred or suffered by Cambridge as a direct or indirect result of any act or omission of, negligence of or breach of the Agreement by the District or its or their Representatives.~~

~~11.2 The District shall, to the maximum extent permitted by applicable law, indemnify Cambridge from and against all local, municipal, county and state taxes to which Cambridge becomes subject as a result Cambridge entering into and performing its obligations under this Agreement, excluding only taxes levied on net income.~~

~~11.3 The District shall be solely responsible for ensuring it fully complies with any and all~~

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:36:25 AM -04'00'

Number: 2 Author: Rachel Cabrera Subject: Comment on Text Date: 11/3/2025 11:35:04 AM

Add- Providing that the request does not violate the Family Educational Rights and Privacy Act (FERPA).

requirements of any applicable national, regional or municipal regulation, legislation and procedure regarding all matters concerning this Agreement and Cambridge shall in no way be held liable for breaches by the District of any such requirements and, in any case, the District agrees irrevocably and unconditionally to indemnify Cambridge in full and on demand and keep Cambridge so indemnified in respect of all consequences of the District's non-compliance with any such requirements.

11.4 Should the District fail to comply with the requirements of Clause 11.2 Cambridge has the right to immediately terminate this Agreement.

11.5 SUBJECT TO CLAUSE 11.6, CAMBRIDGE SHALL NOT BE LIABLE TO THE DISTRICT FOR:

11.5.1 LOSS OF PROFIT OR REVENUE;

11.5.2 LOSS OF DATA;

11.5.3 LOSS OR REDUCTION OF ANTICIPATED SAVINGS;

11.5.4 LOSS OF OR DAMAGE TO GOODWILL;

11.5.5 LOSS OF OR DAMAGE TO REPUTATION;

11.5.6 LOSS OR RESTRICTION OF OPPORTUNITY; OR

11.5.7 ANY CONSEQUENTIAL OR INDIRECT LOSS OR DAMAGE, COSTS OR EXPENSES WHATSOEVER, HOWSOEVER ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT,

WHICH IS SUFFERED OR INCURRED BY THE DISTRICT AS A RESULT OF ANY BREACH BY CAMBRIDGE OF THE TERMS OF THIS AGREEMENT.

11.6 Nothing in this Agreement shall limit or exclude either party's liability for circumstances where liability may not be so limited by law.

11.7 SUBJECT TO CLAUSE 11.6, THE TOTAL LIABILITY OF CAMBRIDGE TO THE DISTRICT UNDER OR IN CONNECTION WITH THIS AGREEMENT, WHETHER ARISING IN CONTRACT, TORT, NEGLIGENCE, BREACH OF STATUTORY DUTY OR OTHERWISE SHALL NOT EXCEED THE SUM OF $10,000.

11.8 The payments due under this Agreement have been negotiated and agreed on the basis that Cambridge may limit its liability to the District as set out in this Agreement and the District confirms that it shall itself bear or insure against any loss for which Cambridge has limited its liability under this Agreement.

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:36:47 AM -04'00'

11.9 EXCEPT AS EXPRESSLY SET OUT IN SECTION 3.1 OF THIS AGREEMENT, ALL WARRANTIES, CONDITIONS, TERMS AND UNDERTAKINGS, EXPRESS OR IMPLIED, WHETHER BY STATUTE, COMMON LAW, CUSTOM, TRADE OR USAGE, COURSE OF DEALINGS OR OTHERWISE, INCLUDING AS TO QUALITY, PERFORMANCE OR FITNESS OR SUITABILITY FOR PURPOSE, IN RESPECT OF ANY SERVICE TO BE PROVIDED BY CAMBRIDGE UNDER THIS AGREEMENT ARE EXCLUDED TO THE FULLEST EXTENT PERMITTED BY LAW.

12 Termination

12.1 Either party is entitled to terminate the Agreement immediately by written notice to the other if:

12.1.1 an event occurs that is expressed to be a terminable event under this Agreement, including but not limited to a Force Majeure event;

12.1.2 an encumbrancer takes possession or a receiver is appointed over any of the property or assets of the other party;

12.1.3 the other party makes any voluntary arrangement with its creditors or becomes subject to an administration order, voluntarily files or acquiesces in the filing of a petition for bankruptcy or an involuntary petition is filed against the other party which is not dismissed within 60 days thereafter;

12.1.4 the other party goes into liquidation (except for the purposes of an amalgamation or reconstruction and in such manner that the institution resulting therefrom effectively agrees to be bound by or assume the obligations imposed on the other party under the Agreement);

12.1.5 anything analogous to any of the foregoing under the law of any jurisdiction occurs in relation to either of the parties; or,

12.1.6 the other party ceases, or threatens to cease, to carry on business.

12.2 Cambridge will be entitled to terminate the Agreement immediately by written notice to the District if:

12.2.1 the District commits a material breach of the Agreement, which Cambridge in its reasonable opinion deems incapable of remedy, or in the case of a breach capable of remedy, the District fails to remedy the same within thirty (30) days after receipt of a written notice giving full particulars of the breach and requiring it to be remedied;

12.2.2 the District is subject to any governmental

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:36:57 AM -04'00'

authority intervention or permission that is subsequently withdrawn or revoked during the duration of the Agreement;

12.2.3 the District or its Staff in any way bring into disrepute, or act in any way that Cambridge reasonably feels might bring into disrepute, the name, reputation and interests of Cambridge, its employees, directors, officers, other people associated with Cambridge, or its products or services;

12.2.4 the District fails to administer the Assessments or examinations in accordance with Cambridge's regulations or suffers a serious security breach compromising the integrity of Cambridge's examinations, or otherwise fails to act in accordance with the Handbook;

12.2.5 the District fails to pay any bill from Cambridge within thirty (30) days of the invoice date;

12.2.6 the District at any time challenges the validity of the Intellectual Property Rights of Cambridge or the University of Cambridge; or,

12.2.7 at any time there is a material change in the membership of the School or District which in the reasonable view of Cambridge materially affects the ability of the District to perform its obligations under the Agreement or where the change in membership is as a result of a competitor of Cambridge obtaining an interest in the School.

12.3 Either party may terminate the Agreement at any time by giving six (6) months' notice in writing.

12.4 Any waiver by either party of breach of any provision of the Agreement will not be considered as a waiver of any subsequent breach of the same or any other provision thereof.

12.5 The rights to terminate the Agreement given by this Clause 12 will be without prejudice to any right or remedy of either party in respect of the breach concerned (if any) or any other breach.

13 Consequences of Termination

13.1 Upon termination of the Agreement for any reason:

13.1.1 outstanding monies due by one of the parties to the other will become immediately payable by the other;

13.1.2 each party will honour any outstanding services due to the other at the date of termination;

13.1.3 any Clauses which expressly or by implication have effect after termination will continue in full force and effect, including Clauses 2.2.3, 6, 7, 8, 9, 10, 11 and 13;

13.1.4 all licences granted hereunder will terminate

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:37:26 AM -04'00'

and the District shall immediately remove all reference to Cambridge or Cambridge Marks from its literature and cease to refer to itself as a Cambridge International School or Cambridge Early Years Centre;

13.1.5 the District shall return all property and equipment belonging to Cambridge, including but not limited to any plaques and certificates of registration and all Confidential Information; and,

13.1.6 subject as otherwise provided herein and to any rights or obligations which may have accrued prior to termination, neither party will have any further obligation to the other under the Agreement.

13.2 The District will not make any attempt to register Entries after either party has given written notice of termination of the Agreement, including for the avoidance of doubt, notice of termination under Clause 12.3.

14 Changes to the Agreement

14.1 Cambridge reserves the right to alter the Handbook and any of its other documentation, with any changes taking immediate effect unless otherwise stated. Cambridge will use reasonable endeavours to communicate any such changes to the District but for the avoidance of doubt, any delay or failure to do so will not delay or invalidate the coming into effect of such changes.

15 General

15.1 The District shall:

15.1.1 comply with all applicable laws, statutes, regulations, and codes relating to anti-bribery and anti-corruption ("**Relevant Requirements**");

15.1.2 not engage in any activity, practice or conduct which would violate the Relevant Requirements;

15.1.3 have and shall maintain in place throughout the term of this Agreement its own policies and procedures, including but not limited to adequate procedures, to ensure compliance with the Relevant Requirements and will enforce them where appropriate; and

15.1.4 promptly report to Cambridge any request or demand for any undue financial or other advantage of any kind received by the District in connection with the performance of this

Number: 1	Author: Rachel Cabrera	Subject: Cross-Out	Date: 10/29/2025 9:37:42 AM -04'00'
Number: 2	Author: Rachel Cabrera	Subject: Cross-Out	Date: 10/29/2025 9:39:12 AM -04'00'

Agreement,

and breach of this Clause 15.2 shall be deemed a material breach incapable of remedy under Clause 12.2.1.

15.2 The District will not be entitled to perform any of its obligations through any other company or entity or to assign, mortgage, charge or dispose of any of its rights hereunder, or sub-contract or otherwise delegate any of its obligations hereunder.

15.3 The District will ensure that that it does not hold itself out in any way as acting as an agent or representative of Cambridge, including in any agreements or communications with third parties.

15.4 If either party is affected by Force Majeure it will notify the other party immediately of the nature and extent of the Force Majeure and neither party will be deemed to be in breach of the Agreement by reason of any delay in performance, or non-performance, of any of its obligations hereunder to the extent that such delay or non-performance is due to any Force Majeure notified the other party, and the time for performance of that obligations will be extended accordingly. Should the Force Majeure event continue in excess of thirty (30) consecutive or cumulative days, either party may terminate with immediate effect.

15.5 ~~The Agreement supersedes all previous agreements and understandings between the parties with respect to its subject and may not be modified except by an instrument in writing signed by the duly authorised representatives of the parties.~~

15.6 Each party acknowledges that in entering into the Agreement, it does not do so on the basis of, and does not rely on, any representation or warranty or other provision except as expressly provided herein. However, nothing in the Agreement purports to exclude liability for any fraudulent statement or act.

15.7 Nothing contained in the Agreement will be construed to imply a partnership, or employer and employee or principal and agent relationship between the parties and neither party will have any right, power or authority to create any obligations, express or implied on behalf of the other.

15.8 No person who is not party to the Agreement will have any right enforce any terms of the Agreement, except for parties entitled hereunder to indemnity.

15.9 Each party warrants to the other party that it has full power and authority to enter into the Agreement.

15.10 A party's failure to exercise or delay in exercising a right or remedy provided by the

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:40:38 AM -04'00'

Agreement or by law does not constitute a waiver of the right or remedy or a waiver of other rights or remedies; a waiver of a breach of any of the terms of the Agreement or of a default under the Agreement does not constitute a waiver of any other breach or default and will not affect the other terms of the Agreement and a waiver of a breach of any of the terms of the Agreement or of a default under the Agreement will not prevent a party from subsequently requiring compliance with the waived obligation.

15.11 If any provision of the Agreement will be held to be unlawful, invalid or unenforceable, in whole or in part, under any enactment or rule of law, such provision or part will to that extent be severed from the Agreement and rendered ineffective as far as possible without modifying or affecting the legality, validity or enforceability of the remaining provisions of the Agreement which will remain in full force and effect.

16 Law and Jurisdiction

16.1 ~~This Agreement shall be interpreted and construed in accordance with and governed by the laws of the United States of America and the State of New York without regard to its conflict of laws provisions. In the event of an inconsistency between the laws of the United States of America and the State of New York, the laws of the United States of America shall govern this Agreement. Any controversy or claim arising out of or relating to this contract, or the breach thereof, shall be settled by arbitration located in New York, NY administered by the American Arbitration Association in accordance with its Commercial Arbitration Rules, and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof.~~

16.2 ~~The District hereby expressly and irrevocably grants a limited waiver of sovereign immunity for the purposes of resolving any dispute arising from this Agreement, whether arising from an alleged breach of contract, or alleged tortious conduct, or otherwise.~~

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:41:54 AM -04'00'

17 Notices

17.1 Any notices to be given or served under this Agreement shall be in writing and shall be deemed to have been given (a) when received by the respective party if sent by a nationally recognized overnight courier (receipt requested); or (b) on the date sent by email (with confirmation of transmission) if sent during normal business hours of the recipient, and on the next business day if sent after normal business hours of the recipient. Notices must be sent to the respective parties at the following addresses:

Cambridge

The Chief Executive,
Cambridge Assessment International Education,
The Triangle Building,

Shaftesbury Road,
Cambridge,
CB2 8EA
United Kingdom
info@cambridgeinternational.org

District

[2] ~~At the address listed on the Letter of Approval or at the email address of the person who signs the Letter of Approval on behalf of the District or any replacement advised to Cambridge in accordance with Clause 17.2.~~

~~17.2~~ [1] ~~The District will notify Cambridge within fourteen (14) days of any replacement of the person who signed the Letter of Approval by the District or any subsequent replacements.~~

18 Definitions

18.1 In these standard terms the following words and phrases will have the meanings given below:

"**£" or "$**"	means UK pounds Sterling or United States Dollars, respectively;
"**Assessments**"	means the method used to evaluate a learner's performance in relation to a Qualification;
"**Cambridge**"	means the Chancellor, Masters and Scholars of the University of Cambridge, acting through its department Cambridge University Press & Assessment, d/b/a Cambridge Assessment International Education;
"**Cambridge Marks**"	means any trademark, registered mark or design or any other identifier that is

Number: 1 Author: Rachel Cabrera Subject: Cross-Out Date: 10/29/2025 9:43:28 AM -04'00'

Number: 2 Author: Rachel Cabrera Subject: Cross-Out Date: 11/3/2025 11:43:37 AM

Notices should be sent to:
Cheryl Martin, Federal Programs Director
UT Tower, 4th Floor
400 W. Summit Hill Drive
Knoxville, TN 37902

identified with Cambridge, University of Cambridge, Cambridge University Press & Assessment, University of Cambridge Local Examination Syndicate or Cambridge Assessment or Centre for Evaluation and Monitoring including "Cambridge international", "CAIE", "Cambridge Assessment International Education", "CIE", "Cambridge International Examinations", "University of Cambridge Local Examinations Syndicate", "UCLES", "Cambridge University Press & Assessment", the "University of Cambridge" and "Cambridge", "CEM" and "Centre for Evaluation and Monitoring";

"**Centre**" will be read as meaning the same as "School" when reading any documents that are produced by Cambridge, including those that form part of the Agreement;

"**CEM**" the 'Centre for Evaluation and Monitoring' as further described in the CEM EULA;

"**Certificate**" means the document produced by Cambridge recording the achievement by a Learner of having successfully completed the respective Assessments for a Qualification;

"**Commencement Date**" means the date that Cambridge receives cleared funds in its bank account for the payment of the registration programme fee from the District;

"**Confidential Information**" means any information which has been designated as confidential by Cambridge or that ought to be considered confidential (however it is conveyed or on whatever media it is stored) including information that relates to the business, affairs, properties, assets, trading practices, services,

	developments, trade secrets, Intellectual Property Rights, know-how, personnel, contractors and suppliers of Cambridge and all personal data and sensitive personal data within the meaning of the Data Protection Legislation;
"**District**"	means the school district party to this Agreement, acting through its school board or other duly constituted governing authority;
"**Entry**"	means a Learner submitted for a Qualification;
"**Extended Term**"	means each separate period following the Initial Term that runs from 1 October to 30 September each year and for the entirety of the year unless terminated earlier in accordance with these terms;
"**Fees**"	means sums payable by the District to Cambridge for the provision of the Services and that will be described in the Fees List;
"**Fees List**"	means the list of Fees applicable to the District as provided by Cambridge and amended from time to time;
"**Force Majeure**"	means, in relation to either party, any circumstance beyond the reasonable control of that party including (insofar as beyond such control but without prejudice to the generality of the foregoing expression), without limitation any strike, lock-out or other form of industrial action, war, riot, civil commotion, malicious damage, compliance with law or governmental order, rule, regulation or direction, accident, breakdown of plant or machinery, fire, flood, storm or Act of God;
"**Handbook**"	means the Cambridge publication entitled "Cambridge Handbook", which sets out the rules for administering Cambridge Qualifications and

	Assessments and the obligations between Cambridge and schools, as amended by Cambridge from time to time. If the School is approved by Cambridge to offer Cambridge Early Years, the term 'Handbook' will also refer to the 'Cambridge Early Years Handbook' which would be applicable to that programme in place of the standard 'Cambridge Handbook';
"**Intellectual Property Rights**"	means all intellectual property rights throughout the world for the full term of the rights concerned, including, in the case of Cambridge, the Cambridge Marks, whether or not registered and whether or not registrable, including without limitation copyright, database rights, patents, rights in inventions, know-how and technical information, design rights, design patents, registered designs, trade marks (including business and brand names, domain names, devices and logos) and the right to apply for any of the foregoing anywhere in the world;
"**Learner**"	means a candidate for a Qualification entered through aSchool or, if the School is approved to offer Early Years (and as applicable in the context of this Agreement), a child enrolled for the Early Years programme;;
"**Learner Data**"	means any data created, collected, or provided, by the District, Cambridge, a Learner, or a Learner's parent(s) or guardian(s), that is descriptive of or could otherwise be used to identify a Learner, except that anonymous or de-identified data does not constitute Learner Data;
"**Letter of Approval**"	means the School Approval letter identified on its face as such which is sent by Cambridge to the District confirming which Schools are deemed registered;

"**Materials**"	means any administrative materials produced by Cambridge in printed or electronic form, relating to the Syllabuses, Modules or Assessments;
"**Module**"	means a component part of a Qualification;
"**Personal Information**"	means any information which relates to a living individual who can be identified from that information directly, or from that information in combination with other information in the possession of the District or Cambridge;
"**Qualification**"	means a qualification offered by Cambridge to the District so that the District may offer them to Learners at the School;
"**Representative**"	means any agent, officer, employee (whether full- or part-time, permanent, temporary or casual), professional advisor or sub-contractor;
"**School**"	refers to the school or schools that have signed the Letter of Approval, or have otherwise been recognized by Cambridge as approved to offer one or more Qualifications, and will be read as meaning the same as Centre when reading any documents produced by Cambridge that refer to a Centre;
"**School's Premises**"	means premises available to the School, and which are used for the purposes of examination administration;
"**Series**"	means a group of examinations in the same range with the same closing date for entries;
"**Services**"	means those services provided by Cambridge to Districts or to Schools as described in the Cambridge Handbook and made available to the District on a Cambridge password-protected website;
"**Staff**"	means all employees,

	officers, agents, advisors or contractors of the District;
"**Syllabuses**"	means the curriculum content prepared by Cambridge which comprise the Qualifications;
"**Taxes**"	means withholding or other taxes, duties or other amounts.

18.2 The interpretation and construction of the Agreement will be subject to the following provisions:

18.2.1 a reference to any statute, enactment, order, regulation or other similar instrument will be construed as a reference to the statute, enactment, order, regulation or instrument as subsequently amended or re-enacted;

18.2.2 as far as is possible, any Schedule or Appendix to the Agreement will be interpreted consistently with the main body of the Agreement. If there is a conflict between them, the main body of the Agreement will take precedence over any Schedule or Appendix;

18.2.3 the headings to Clauses are for ease of reference only and will not affect the interpretation or construction of the Clauses;

18.2.4 reference to "days" mean ordinary calendar days unless otherwise specified; and,

18.2.5 where the context allows, references to the singular include the plural and vice versa.

18.3 The use of the word 'including', the phrase 'in particular', and similar expressions only illustrate specific examples and are not intended to limit in any way whatsoever the interpretation or construction of the Agreement or any other words in the Agreement.

19 Language

19.1 The Agreement is made only in the English language. If the Agreement is translated into any other language, the English language version shall prevail.

19.2 Any notice, instrument, certificate or other communication given under or in connection with the Agreement will be in the English language, or accompanied by a certified English translation. If such notice, instrument, certificate or other communication is translated into any other language, the English language version shall prevail.

Hi Rachel,

I'd like to check in on the status of the RFP. Do you have an update? Also, I believe I have access to the platform where information for this lies. Can you help me with that too?

Happy New Year by the way 😊

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

Cambridge University Press & Assessment

1 Liberty Plaza, New York, New York 10006

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Together, we shape the learners who will shape the world.

From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Wednesday, December 17, 2025 11:55 AM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]Re: [External]RE: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Hi Joette,

Absolutely, and thank you as well for taking the time to meet. I hope we were able to address and clarify your concerns. Per our discussion, I would like to confirm that Cambridge agrees to the sample contract as written. I have updated Sections 1 and 3 in accordance with our conversation. At this point, the start date will remain flexible.

Thank you,

Rachel Cabrera
Knox County Procurement Division
1000 N. Central St.
Suite, 100
Knoxville, TN 37917
Ph: 865-215-5751
Fax: 865-215-5778
rachel.cabrera@knoxcounty.org

KNOX COUNTY
TENNESSEE

From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Wednesday, December 17, 2025 8:32 AM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]Re: [External]RE: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688-Exceptions

Rachel,

Thank you both for joining the call yesterday! I'm glad we got everyone to the table and clarified the last piece. I appreciate your work, communications, and kindness.

Enjoy the holidays and take time for you!

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Monday, December 15, 2025 10:08:46 AM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: Re: [External]RE: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688-Exceptions

I sent the invite for 2 😊

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Monday, December 15, 2025 9:03:13 AM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Fw: [External]RE: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688-Exceptions

Hi Joette,

I wanted to follow up with you. Did you have a chance to see my email regarding the 9:00 a.m. EST availability, or would you prefer to keep the original 2:00 p.m. EST time?

Thank you,
Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

KNOX COUNTY
TENNESSEE

From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Friday, December 12, 2025 2:11 PM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]RE: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688-Exceptions

Hi Joette,

Would you rather schedule it for 9am?

Thank you,

Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

KNOX COUNTY
TENNESSEE

From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Friday, December 12, 2025 1:40 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]RE: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

I may have sent that too fast – two colleagues are on UK time so 4 hours ahead – if there is not an earlier option for everyone, I can let them know it was all is available

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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From: Joette Viggiano
Sent: Friday, December 12, 2025 1:36 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: RE: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

I appreciate the message, Rachel. Clear is kind!

I can send a calendar invite for Tuesday at 2 and then you can forward to whoever needs to be included.

Thank you for all of your communications through this process.

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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1 Liberty Plaza, New York, New York 10006

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Friday, December 12, 2025 1:31 PM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Hi Joette,

My colleague from the Law Department is available on Tuesday, December 16th at 2pm EST to provide any clarifications. Does that time work for you all? I do want to make clear that the County's indemnity language and limitation of liability clauses are non-negotiable and will remain as written. We do not want to waste your time or your legal team's time; however, we are happy to clarify or explain any portions of the document as needed.

Thank you,
Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org



From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Friday, December 12, 2025 11:12 AM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]RE: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Happy Friday!

We would like to accept the offer to meet with the legal team. I looked at the calendar of my colleagues and next week is a little all over the place, but I will make it happen! Monday would have to be an afternoon option. How does Tuesday look on your end?

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Thursday, December 11, 2025 1:53 PM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Hi Joette,

I apologize for the delay. We are unable to revise the indemnification language in the sample contract. We have included a provision stating that each party's maximum liability for direct damages will not exceed the amount paid by the District to the Contractor; however, we cannot modify or limit the indemnification owed to the County by the Contractor.

To proceed, Cambridge will need to confirm whether you can accept the indemnification language as presented in the sample contract. If helpful, I would be glad to arrange a meeting with our Law Department and your legal team to discuss this further.

Thank you,

Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

KNOX COUNTY TENNESSEE

From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Wednesday, December 10, 2025 1:28 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]RE: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Hi Rachel,

I'd like to make sure that we have answered and provided all information that has been requested.

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

Cambridge University Press & Assessment

1 Liberty Plaza, New York, New York 10006

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From: Joette Viggiano
Sent: Tuesday, December 2, 2025 4:56 PM
To: Rachel.Cabrera@knoxcounty.org
Subject: FW: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Rachel,

We understand and accept that Knox cannot indemnify Cambridge. As a separate issue, we wonder if the indemnity given by Cambridge can be subject to a cap on liability, rather than being uncapped?

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

Cambridge University Press & Assessment

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Tuesday, December 2, 2025 4:40 PM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Hi Joette,

Thank you for your prompt response. I have updated the Sample Contract and the redlined Terms and Conditions accordingly.

However, neither the County nor the District has the authority to indemnify a contractor. Therefore, the language in the Sample Contract must remain unchanged in those sections, and this requirement is non-negotiable. If Cambridge is unwilling to accept this language, your proposal will be deemed non-responsive and will no longer be eligible for award.

Thank you,
Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Tuesday, December 2, 2025 3:46 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]RE: [External]RE: [External]FW: RFP 3688- Exceptions

Hi Rachel,

Thank you again for the message and for the time to communicate with colleagues.

For the termination language, may we suggest the following language: *"Termination of this Agreement shall not affect the ability of any student enrolled at the time of termination to complete their course(s) (including any applicable assessments) pursuant to the terms and conditions in place at enrollment. The provisions of the Handbook and all applicable fees shall continue to apply."*

Clause 1.5, as amended, will need to be a complete sentence.
Suggested: "*The provisions of the Handbook are hereby fully incorporated into and form part of the Agreement.*"

Clause 2.3.1
Should read: "carry out its obligations as set out in the Agreement, including the Handbook, and in particular will carry out the duties of a Centre, with respect to the School, as set out in the Handbook."

In respect of liability and indemnity, it is requested that the indemnity that Cambridge gives in respect of gross negligence (i) applies mutually and (ii) is subject to a cap. May we ask that the indemnity can be brought within the scope of the overall cap on liability, which will bring this agreement in line with the terms of the previous agreement?

Please let me know if there is anything else that we can provide.

Thank you!

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Tuesday, December 2, 2025 8:58 AM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]RE: [External]FW: RFP 3688- Exceptions

Hi Joette,

I hope you had a pleasant holiday. I'm following up on the email I sent Friday, November 21. To proceed with the evaluation, I'll need confirmation that Cambridge agrees to the language in the sample contract. Otherwise, Cambridge will be deemed non-responsive and no longer eligible for award.

Thank you,
Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

KNOX COUNTY
TENNESSEE

From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Friday, November 21, 2025 9:55 AM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]RE: [External]FW: RFP 3688- Exceptions

Thank you, Rachel! I have passed along to my team.

Have a great weekend and a nice holiday 😊

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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CAMBRIDGE
UNIVERSITY PRESS & ASSESSMENT

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Friday, November 21, 2025 8:27 AM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]FW: RFP 3688- Exceptions

Hi Joette,

I hope you are having a great Friday.

I have removed the strikethrough in Section 1.5.2 of Cambridge's Standard Terms and Conditions and updated Section 2.3.1 accordingly.

Regarding the termination clause, I have revised the sample contract to provide 60 business days' notice for both parties to ensure fairness. Additionally, I included the following language:

> *"Termination of this Agreement shall not affect the ability of any student enrolled at the time of termination to complete their course(s) pursuant to the terms and conditions in place at enrollment."*

For the indemnity and liability section, under state law, the County and District do not have the authority to indemnify a contractor. Therefore, the language in the sample contract must remain unchanged in these sections.

Finally, IT has confirmed approval for you to retain the student assessment results for verification purposes.

I will need email confirmation of Cambridge's agreement in order to proceed with the evaluation.

Thank you,

Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

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Knoxville, TN 37917

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Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

KNOX COUNTY
TENNESSEE

From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Monday, November 10, 2025 5:53 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]FW: RFP 3688- Exceptions

Hi Rachel,

Our team has the following points to address:

1. **Incorporation of the Handbook**. We note that, as per your email, the Handbook is included in the terms furnished as part of Cambridge's bid, and is therefore intended to be incorporated into the contact between us. We notice that some of the changes to our Standard Terms appear to contradict that position (for example, the deletion of clauses 1.5.1 and 2.3.1), so propose amending as necessary to ensure that the correct position is correctly reflected.
2. **Termination rights**. The combined effect of the Sample Contract and our Standard Terms (as redlined by Knox) is that Cambridge's only right to terminate is with 120 days' notice. We are uncomfortable with Cambridge's lack of rights to terminate on a shorter notice period upon specific events, and propose that the termination rights for cause set out in clauses 12.1 and 12.2 of our Standard Terms (which includes market-standard provisions such as terminating for the other party's insolvency or material breach of the contract plus further rights that Cambridge has in its contracts with all of its schools worldwide, including its District contracts in the US) are incorporated into the contract. Further, it is not acceptable to Cambridge that Knox could terminate for convenience on 30-days'notice given the nature of our services i.e. provision on examinations. For example, we send out exam papers over a month ahead of an exam being taken. Termination on such short notice would therefore be detrimental to the students and therefore we need to retain the position in Clause 12.3 of our Standard Terms (mutual 6 months' notice for termination for convenience).
3. **Indemnity and liability**. The current liability position is that each party's liability is limited to the amount paid by Knox under the contract, except in respect of indemnities and confidentiality, which are uncapped. In addition, Cambridge indemnifies Knox against any losses arising out of any grossly negligent act or occurrence or any intentional omission or commission. This position would only be acceptable if the indemnity referred to: (i) applies mutually to each party; and (ii) is subject to a cap. We could accept that the cap for this indemnity is at a higher level than the general liability cap if Knox want to suggest something for Cambridge's consideration. We consider that these changes will bring the liability more in line with the position previously agreed between the parties.
4. **Return/deletion of student data**. Cause 23 of your Sample Contract requires Cambridge to delete or return all confidential information within 30 days of termination of the contract. We will need to retain certain information (specifically student assessment results) so that we are able to verify the results in the future if, for an example, an employer or a university were to request this through our verification of results service. If we had to delete student results from our system this is likely to be detrimental to students. We therefore propose carving this data out of the deletion/return requirement.
5. **Next steps**. If you can confirm that the above points are acceptable then we will produce a markup incorporating these changes.

We look forward to hearing from you.

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

Cambridge University Press & Assessment

1 Liberty Plaza, New York, New York 10006

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From: Joette Viggiano
Sent: Monday, November 3, 2025 2:52 PM
To: Rachel Cabrera <rachel.cabrera@knoxcounty.org>
Subject: FW: [External]RE: [External]RE: RFP 3688- Exceptions

Thank you for the message, Rachel. I have passed on to the teams involved and will get back to you once I have a response.

I appreciate you!

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Monday, November 3, 2025 2:33 PM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]RE: [External]RE: RFP 3688- Exceptions

Hi Joette,

I have consulted with the Law Department. To move forward in the evaluation process for RFP 3688 Advanced Academic Programs, Cambridge must review and agree to language in the attached sample Contract. I have redlined the Terms and Conditions that you sent and attached them to this email. We would incorporate the redlined Terms and Conditions into our Contract along with the proposal you submitted and the Handbook you sent me. The schools do not have the authority to sign additionally documents, agreements or Standard Terms and Conditions. Therefore, should Cambridge be awarded a Contract for Advanced Academic Programs all requirements of the program must be addressed in the Contract including security requirements for program materials. Any additional documents would have to be routed through the Board of Education and County Commission for approval which is lengthy process. Please let me know if you or your legal team have any questions and whether Cambridge agrees to the sample Contract attached.

Thank you,

Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org

KNOX COUNTY
TENNESSEE

From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Friday, October 31, 2025 2:06 PM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]RE: [External]RE: RFP 3688- Exceptions

Hi Rachel,

Absolutely! Here is the link: https://www.cambridgeinternational.org/Images/723185-cambridge-handbook-2025.pdf and I have also attached it to this email.

Thank you!

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Friday, October 31, 2025 12:15 PM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: Re: [External]RE: RFP 3688- Exceptions

Hi Joette,

I appreciate you sending me Cambridge's Terms and Conditions. Can you please send me a copy of the Handbook? I couldn't get the website to pull it up.

Thank you,

Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org



From: Joette Viggiano <joette.viggiano@cambridge.org>
Sent: Wednesday, October 29, 2025 9:37 AM
To: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Subject: [External]RE: RFP 3688- Exceptions

Hi Rachel,

Thank you for your email. We have reviewed Tab VIII (Exceptions) and have notice that some of the language included was incorrect. Apologies for this oversight. Please find a revised Tab VIII document with updates to: (i) section 3.9 on Contract Execution; and (ii) section 3.26 (Pricing) plus a copy of Cambridge's Standard Terms and Conditions that are now referenced in our revised section 3.9 response. As per our revised response there is no need for us to provide an LOA.

Updated language for Tab VIII Exceptions:

3.9 Contract Execution:

Cambridge International understands and accepts that Knox County will draft a Contract upon award of this proposal. However, as explained in our clarification question Cambridge is a global provider of specialist exam services, we require that our contract includes essential terms

specific to our services—such as exam security protocols—which may not be covered in you standard agreement and it is these terms that form the basis of our contracts with many U.S. districts. We attach here our Standard Terms and Conditions and these will need to be incorporated into any contract that we sign with Knox if we are successful.

3.26 Pricing:

Pricing has been outlined in Tab VI (Proposed Cost) in detail. Cambridge International has provided fixed pricing for the first 12-month period of this contract, as outlined in Tab VI.

Please let me know if there is anything else. Thank you!

Joette Viggiano

School Development Manager, Southeast USA

Joette.Viggiano@Cambridge.org

Cambridge University Press & Assessment

1 Liberty Plaza, New York, New York 10006

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From: Rachel Cabrera <Rachel.Cabrera@knoxcounty.org>
Sent: Monday, October 27, 2025 12:18 PM
To: Joette Viggiano <joette.viggiano@cambridge.org>
Subject: RFP 3688- Exceptions

Hi Joette,

After doing a cursory review of the proposal you submitted for Advanced Academic Programs, I noticed there were some exceptions taken. We are still in the evaluation process for Request for Proposal Advanced Academic Programs. However, the County will need to review the Letters of Agreement referenced in the exceptions before moving forward in the evaluation process.

Please send me a copy of the LOA.

Thank you,

Rachel Cabrera

Knox County Procurement Division

1000 N. Central St.

Suite, 100

Knoxville, TN 37917

Ph: 865-215-5751

Fax: 865-215-5778

rachel.cabrera@knoxcounty.org



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KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

Contracts awarded for RFP 3688 for Advanced Academic Programs

Bedford, Freeman & Worth Publishing Group, LLC
College Board
International Baccalaureate Organaization
Savvas Learning Company LLC
The University of Cambridge

Cost to Knox County Schools

Not to exceed budgeted amount

Description and Type of Funding Source

General purpose or federal funds can be used

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

RLA-18201 **R-26-3-203**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	TERRI COATNEY, KNOX COUNTY SCHOOLS
Department:	KNOX COUNTY SCHOOLS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Contract with United Elevator Services, LLC for the provision of elevators and services up to $171,071.00 for the term of March 1, 2026 through the last day of the cooperative renewal date.
(Schools)

Attachments

Resolution
Contract
Fiscal Note

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A CONTRACT WITH UNITED ELEVATOR SERVICES, LLC FOR THE PROVISION OF ELEVATORS AND SERVICES UP TO $171,071.00 FOR THE TERM OF MARCH 1, 2026 THROUGH THE LAST DAY OF THE COOPERATIVE RENEWAL DATE.

RESOLUTION: **R-26-3-203**

REQUESTED BY: **SCHOOLS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County Schools desires to enter into a contract with United Elevator Services, LLC through the Interlocal Purchasing System – TIPS Cooperative 25050201 for the provision of Elevators and Services; and

WHEREAS, the proposed contract with United Elevator Services, LLC is in the amount of $171,071.00 for the term of March 1, 2026 through the last day of the cooperative renewal date; and

WHEREAS, at its regularly scheduled meeting on March 5, 2026, the Knox County Board of Education approved the contract with United Elevator Services, LLC.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The contract with United Elevator Services, LLC for the provision of elevators and services is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the contract with United Elevator Services, LLC for the provision of elevators and services shall be executed subject to such amendment or action not affecting the substantive provisions of the agreement as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

KNOX COUNTY GOVERNMENT

AND

UNITED ELEVATOR SERVICES, LLC.

This Contract made and entered into this _____ day of _____, 2026 by and between **Knox County Government** through its governing body and authorized representative, hereinafter referred to as **"Knox County" and United Elevator Services, LLC. Company.** hereinafter referred to as **"Contractor."**

Whereas, County may request future quote bids for the provision of Elevators and Services for Knox County Government, (The Interlocal Purchasing System – TIPS Cooperative 25050201);

Whereas, Contractor submitted a Bid in accordance with said requested specifications, the response of which is the most responsible and responsive bid meeting specifications accepted by Knox County;

Whereas, Contractor agrees and undertakes to provide Elevators and Services to Knox County, as set forth in the TIPS Cooperative 25050201, for future goods and services by Contractor. Further, in accordance with the lawful directions of the Knox County Government, the Contractor agrees in all respects, to be governed by the TIPS Cooperative 25050201 specifications and the Contractor's response.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this contract.** This contract commences on the 1st day of March 2026 and ends the last day of the cooperative renewal date, unless terminated in conformity with the terms of this contract as contained in paragraphs 7 and 8.

2. **Payment.** Knox County shall pay Contractor the amount as agreed upon TIPS Cooperative 25050201 for Elevator Services.

Pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed.

3. **Placement of Orders.** Knox County departments and agencies will place orders with the Knox County Procurement Division. Knox County Procurement will issue purchase orders to the Contractor. Only purchase orders issued by Knox County Procurement shall be honored.

4. Invoicing and reporting requirements. Contractor shall invoice Knox County upon the successful completion of all aspects of a particular job. Contractor is hereby cautioned that it can take a minimum of 30 days to process invoices.

As several different departments may use this contract, please adhere to the following guidelines:

For KCSMO mail all invoices to:

Knox County Schools Maintenance & Operations
Purchasing Supervisor
900 East Fifth Avenue
Knoxville, Tennessee 37917

For Knox County Departments mail all invoices to:

The address listed on the Purchase Order for the ordering department.

5. Pricing and Escalation. Contractor warrants that the unit pricing stated in TIPS Cooperative 25050201 shall remain firm from the first day of the contract period.

6. Safety. The successful vendor shall exercise all safety measures associated with the services to be performed under this contract and hereby warrants that all employees working under this contract have been trained in the proper and safe practices of Elevator Services and related duties.

7. Termination. Knox County may terminate this contract with or without cause, upon written notice of not less than thirty calendar days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed written permission of Knox County. The agencies utilizing this Contract may also terminate their individual participation by written notice.

Should the Contractor fail to provide Elevator Services as detailed herein, Knox County will communicate the **problem(s) to the Contractor** verbally and keep a written record as to what the problem(s) are and when the contractor was contacted. **The Contractor shall have 72 hours** to rectify the problems. If the same or other problems persist or reoccur, Knox County may terminate the contract.

8. Appropriations. In the event no funds are appropriated by Knox County for Elevator Services in any fiscal year or insufficient funds exist to provide the services, then the contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no obligations owed to or by either party.

9. **Independent contractor.** Contractor and Contractor's employees shall serve as independent contractors and County shall not be in any manner responsible for any payment, insurance, or incurred liability.

10. **Compliance with all federal, state, and municipal laws.** Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of Structural Stabilization Services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

11. **Criminal background check.** Contractor agrees to comply with Tennessee Code Annotated Section 49-5-413. As required under the statute, Contractor will provide fingerprinting and criminal history records checks, conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation, for all employees, subcontractor personnel and students that will enter the grounds of any of the schools (previously defined as premises) in performance of the Services in this contact before permitting the employee, subcontractor personnel or student to have contact with students or enter school grounds when students are present. Criminal background checks are the expense of the Contractor. If the employee or subcontractor personnel has previously had a criminal history check in accordance with Tennessee Code Annotated Section 49-5-413, Contractor shall provide a copy of the criminal background check to the Knox County and this will serve as compliance with said requirement.

12. **Severability clause.** If any provision of this contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

13. **Prohibition against assignment.** Contractor shall not assign this contract to any party, company, partnership, incorporation, or person without prior specific written consent of Knox County.

14. **Jurisdiction.** This Contract shall be governed by the laws of the State of Tennessee both as to interpretation and performance. The Chancery Court and/or the Circuit Court of Knox County, Tennessee, shall have exclusive and concurrent jurisdiction of any disputes, which arise hereunder.

15. **Right to inspect.** Knox County reserves the right to make periodic inspections of the manner and means the services are performed.

16. **Nondiscrimination and non-conflict statements.** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex or national origin, shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this contract, or in the employment practices of Contractor. Contractor shall upon request show proof of such non-discrimination, and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

17. Books and records. Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this contract and make such materials available at their offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under the contract for inspection by Knox County or by any other governmental entity or agency participating in the funding of this contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that **represent the Contractor's costs** of manufacturing, acquiring or delivering the products and services governed by this contract.

18. Limitations of liability. In no event shall Knox County be liable for any indirect, incidental, consequential, special or exemplary damages or lost profits, even if Knox County has been advised of the possibility of such damages.

19. Contractor shall indemnify, defend, save and hold harmless, Knox County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the **contract by Contractor**, its subcontractors, agents or employees or due to any negligent act or occurrence or omission or **commission of Contractor**, its subcontractors, agent, or employees.

20. Delivery. Contractor shall render Elevator Services for Knox County in accordance with the **Contractor's** schedule and coordinated with Knox County or its designee.

21. Contract documents. It is mutually agreed by both parties that the following documents are made part of this contract and are incorporated herein by reference:

a. Tips Cooperative 25050201 for Elevator Services
b. Certificate of Insurance
c. Criminal History Affidavit
d. Performance and Payment Bonds (if required, by project)

It is agreed that this contract, represents the **entire contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect.

In witness whereof, the parties hereto have caused this contract to be executed on the day and year first above written.

KNOX COUNTY BOARD OF EDUCATION

This Document is approved by the Knox County board of Education on the _Day of _____, 2026, as reflected in its minutes, and certified by its Chairperson.

BOARD CHAIR – Signature _____ **BOARD CHAIR – Printed Name** _____

Date _____

KNOX COUNTY GOVERNMENT

MAYOR – Signature _____ **MAYOR – Printed Name** _____

Date _____

KNOX COUNTY LAW DIRECTOR

CONTRACT #: 26-104

APPROVED AS TO LEGAL FORM

Law Director's Office – Signature _____ **Law Director's Office – Printed Name** Gary Dugler

Date 2/19/2026

UNITED ELEVATOR SERVICES

AUTHORIZED SIGNATURE _____ **PRINTED NAME** _____

DATE _____

KNOX COUNTY, TENNESSEE

The Interlocal Purchasing System

Purchasing Made Personal

Printed 11 February 2026

www.unitedelevator.com

United Elevator Services

EMAIL PO & VENDOR QUOTE TO: TIPSPO@TIPS-USA.COM PO AND QUOTE MUST REFERENCE VENDOR TIPS CONTRACT NUMBER ATTACH PO AS A PDF - ONLY ONE PO (WITH QUOTE) PER ATTACHMENT

PAYMENT TO

ADDRESS 4835 Airport Highway
CITY Knoxville
STATE TN
ZIP 37920

TIPS CONTACT

NAME Charlie Martin
PHONE (866) 839-8477
FAX (866) 839-8472
EMAIL tips@tips-usa.com

DISADVANTAGED/MINORITY/WOMAN BUSINESS ENTERPRISE: N HUB: N

SERVING STATES

TN | KY | VA | WV | NC | SC | GA | AL | MS

Overview

In business since 1958, United Elevator Services, LLC is an independent family owned, non-union, full-service company. We offer new installations, preventative maintenance control plans, modernizations, and repairs on elevators and accessibility equipment (residential and commercial).

AWARDED CONTRACTS "View EDGAR Doc" on Website

Contract	Comodity	Exp Date	EDGAR
25050201	Elevators and Servicing	07/31/2028	See EDGAR Certification Doc.
25050202	Elevators and Servicing (JOC)	07/31/2027	See EDGAR Certification Doc.

CONTACTS BY CONTRACTS

25050201

Shawn Lyness	Manager	(865) 573-0731	shawnl@unitedelevator.com
Taylor Sawyer	Executive	(865) 573-0731	taylors@unitedelevator.com

25050202

Shawn Lyness	Manager	(865) 573-0731	shawnl@unitedelevator.com
Taylor Sawyer	Executive	(865) 573-0731	taylors@unitedelevator.com

TIPS PART 1 SOLICITATION DOCUMENT

THE INTERLOCAL PURCHASING SYSTEM ("TIPS")

A department of TIPS Lead Agency:

TEXAS REGION 8 EDUCATION SERVICE CENTER ("Region 8 ESC")

TIPS RFP 250502 Elevators and Servicing (PART 1)

I. NOTICE TO PROPOSERS.

Contact Information:
TIPS/Region 8 ESC
4845 US Hwy. 271 North
Pittsburg, Texas 75686
Toll Free: (866) 839-8477
Email: bids@tips-usa.com
Website: www.tips-usa.com

Part 1 Notice: This solicitation document applies to Part 1 of this opportunity only. All terms, conditions, information, and notices are applicable to Part 1. If you have questions about whether to respond to Part 1, Part 2, or both Parts 1 & 2, please carefully review the attachment entitled "TIPS Informational – Do I Respond to Part 1, Part 2, or Both?"

TIPS Solicitation:
TIPS RFP 250502 Elevators and Servicing (PART 1)
This solicitation document is a Request for Proposal as permitted in Texas Education Code § 44.031. Regardless of potential informal or erroneous references to other solicitation terms such as: "solicitation", "bid", "request for competitive sealed proposal", "RCSP", etc., this solicitation is the method of procurement identified at this location.

Proposal Deadline:
All proposals shall be received electronically, or otherwise sealed, by: June 20, 2025 AT 3:00 P.M. LOCAL TIME

Access to Solicitation Documents:
Solicitation documents are located online at http://tips.ionwave.net. If you encounter a problem while accessing the solicitation, please contact TIPS at the contact information provided for assistance.

Piggybacking Notice:
This IDIQ Solicitation is intended for the use of public entities and qualifying non-profit entities who join TIPS, now and in the future, ("TIPS Members") to piggyback upon and utilize as their own solicitation for legal procurement purposes. TIPS Contracts are

established through free, full and open competition as described by the laws of TIPS jurisdiction and are available for piggy-back by other government entities anywhere in the United States, subject to each entities' jurisdictional law and regulation. For the purpose of enhanced accessibility, potential cost savings, increased flexibility and choice, and to ensure adequate coverage of requirements for Region 8 Education Service Center and TIPS Members, multiple awards are anticipated.

TIPS Administration Fee:
TIPS collection of fees is required pursuant to Texas Government Code Section 791.011 et. seq. The TIPS Administration Fee for this contract shall be 2% of the amount paid by the TIPS Member for each TIPS Sale, less shipping cost, bond cost, and taxes, if identifiable.

Incorporation of Solicitation:
If Vendor proposes and is awarded, the specifications, terms, and conditions of this solicitation shall be incorporated by reference into the final, awarded TIPS Contract.

TIPS Contract Jurisdictional Limitations:
Depending on different entities' and jurisdictions' laws and regulations, TIPS Member Customers may be prohibited from utilizing TIPS as a procurement method for any specific procurement or procurement-type. TIPS makes no representations about when a TIPS procurement will be appropriate for any particular expenditure. It is always up to the TIPS Member customer to determine whether a TIPS procurement is appropriate under their applicable laws and policies.

Vendor Questions & Pre-Bid Meeting Requests:
Substantive questions will be received until June 6, 2025 at 12:00 p.m. local time. Questions about the specific solicitation shall be submitted to bids@tips-usa.com with the subject line "TIPS 250502 Elevators and Servicing (Part 1) – Vendor Question". Vendor-specific questions about the process will often be answered directly. However, substantive questions that are not properly addressed in the solicitation information will be properly published to all vendors as an addendum or "Question & Answer" document.

Pre-Bid Meetings are not mandatory and, if requested, TIPS reserves the right to determine whether a Pre-Bid meeting shall be held. Pre-Bid Meetings may be requested by any proposer on or before May 15, 2025 by emailing bids@tips-usa.com with the subject line "TIPS 250502 Elevators and Servicing (Part 1) – Pre-Bid Meeting Request".

Anticipated Schedule of Solicitation Events:
These anticipated dates are subject to change at TIPS' discretion. TIPS reserves the right to extend the proposal deadline for any reason.

Posting Date	May 1, 2025	8:00 A.M. Local Time
Proposal Deadline	June 20, 2025	3:00 P.M. Local Time
Proposal Opening	June 20, 2025	3:00 P.M. Local Time
Proposal Review Begins	June 20, 2025	3:01 P.M. Local Time
Proposals Award	July 24, 2025	8:30 A.M. Local Time
Award Notifications	July 24, 2025	12:00 P.M. Local Time

Estimated Contract Value:
The estimated value for the life of the contract for all awarded vendors combined is $147,636.10. This is an estimate and is not a guarantee of the minimum or maximum value of the contract because TIPS cannot speculate on TIPS Members' future needs or budget allocations as they relate to this solicitation.

II. TIPS

The Interlocal Purchasing System ("TIPS") is a department of Texas Region 8 Education Service Center, a government entity. TIPS, a governmental entity and a national purchasing cooperative operating under the Interlocal Cooperation Act[1], seeks to provide a valuable and necessary solution to public entities and qualifying non-profits by performing the legal public procurement solicitation process and awarding compliant contracts to qualified vendors. When permitted by TIPS Members' law and policy, instead of public entities and qualifying non-profits expending time, money, and resources on the extensive legal competitive procurement process, the use of TIPS, allows public entities to quickly select and purchase their preferred products or services from qualified, evaluated Vendors on an as-needed basis. TIPS evaluates and scores all responsive, properly submitted proposals. Recommendations for award will be made to the Region 8 Education Service Center Board of Directors. Awards are ratified or rejected at the monthly meeting of Region 8 ESC Board of Directors, or as delegated by the Board of Directors. TIPS utilizes a value approach and bases its award recommendations on several factors mandated by the Texas Education Code section §44.031. The factors are allotted points as described herein. TIPS reserves the right to assign or deduct any number of points in any given category if warranted due to insufficient response or Vendor stipulated exceptions and limitations.

III. PROPOSAL GUIDANCE

1. TIPS strongly encourages all interested vendors to respond using the TIPS IonWave Electronic eBid System for proposal submission. The online submission has many safeguards built into the system that will notify proposers of mistakes or missing information. These safeguards will significantly minimize the potential for Vendor disqualification. If you encounter trouble with the TIPS IonWave eBid System, please contact TIPS.
2. If it is determined that Vendor cannot utilize the TIPS IonWave eBid System, Vendor must email bids@tips-usa.com seeking a manual submission packet which TIPS will send to you via US Mail or FedEx within two business days of receiving your request. All manual responses must be sealed in an envelope and must be physically received by TIPS at the TIPs Contact information provided herein and by the deadline provided herein.
3. If you are viewing this document, you have likely already logged into the TIPS IonWave eBid System. If not, you need to register/login to the TIPS IonWave eBid System online at https://tips.ionwave.net/ and follow these instructions.
4. Once logged in, confirm that your Supplier Profile properly lists your accurate entity-name, EIN, d/b/a's, and contact information, matching your current W9. If it does not, either correct it, or disable the inaccurate profile and create a correct profile before proceeding.
5. Next, confirm that all emails issued by the following domains can be received by your entity's email servers to ensure that you do not miss vital messages: "@tips-usa.com", @tipsconstruction.com", and "ionwave.net"
6. Once that review/update is complete, Vendor shall carefully read through all bid Event Details, Bid Notes, Attachments, Addenda, Instructions, and Attribute Questions before submitting questions to TIPS.
7. TIPS recommends starting Vendor's proposal response by answering the required "Attribute" questions within the IonWave eBid System. These responses are required and it is beneficial to start with the Attribute questions as some of the bid Attachments are only required depending on your responses to those questions.
8. Once Vendor has completed the Attribute Questions, Vendor must download, properly complete, and upload into the correct "Response Attachments" location all required Attachments for Part 1.
9. Once Vendor has completed the Attribute Questions and uploaded all required Attachments for Part 1, Vendor must submit the proposal before the legal Proposal Deadline. The system will notify you of errors and allow you to correct those errors where you would otherwise risk unintentional disqualification through paper submission.
10. Proposals may be retracted, amended, and resubmitted by the proposer on the electronic eBid System at any time prior to the legal deadline.
11. If an addendum is posted, you will receive an email notification and you are required to login to the IonWave eBid System to address the Addendum.
12. TIPS reserves the right to reject any or all proposals, to accept any proposals, and to waive any informality in the proposal process provided waiver is equally applied to all proposers and another proposer is not prejudiced by the waiver.
13. If Vendor has proposed deviations to TIPS' standard terms, there is an Attribute Question where Vendor can assert that it has proposed negotiations. If Vendor responds to that attribute question asserting deviations, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document Vendor Agreement and instruct Vendor to include all requested negotiations as redline edits for TIPS consideration. This is the only proper way to submit proposed deviations for TIPS consideration. TIPS reserves the right to accept, decline, or modify Vendor's requested negotiated terms. For this reason, asserting deviations or negotiations may ultimately delay or prevent award.
14. Withdrawal of proposals will not be allowed for a period of 90 days following the opening unless approved by TIPS in writing.

[1] See Texas Government Code, Chapter 791.

15. If a Vendor desires to protest a process or decision by TIPS, the Vendor must follow the following process: http://www.tips-usa.com/assets/documents/docs/letters/Protest_Procedures_for_Vendor.pdf

Proposal Format

All responses should be direct, concise, complete, and unambiguous.

1. Attribute Questions.
Vendor must respond carefully and accurately to all "Attributes" within the IonWave eBid System.

2. Completion of Attachments.

Pricing Form 1 (Part 1)
If responding to Part 1, this Pricing Form 1 (Part 1) must be downloaded from this location, reviewed, properly completed as instructed, and uploaded to the "Response Attachments" location entitled "Pricing Form 1 (Part 1)."

Pricing Form 2 (Part 1)
If responding to Part 1, this Pricing Form 2 (Part 1) must be downloaded from this location, reviewed, properly completed as instructed, and uploaded to the "Response Attachments" location entitled "Pricing Form 2 (Part 1)."

Alternate or Supplemental Pricing Documents (Part 1)
Optional. If responding to Part 1, when completing Pricing Form 1 (Part 1) & Pricing Form 2 (Part 1), you direct TIPS to view additional, alternate, or supplemental pricing documentation, you may upload that Part 1 documentation at the "Response Attachments" location entitled "Alternate or Supplemental Pricing Documents (Part 1)."

Vendor Agreement (Part 1)
The Vendor Agreement must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Vendor Agreement (Part 1). If Vendor has proposed deviations to the Vendor Agreement (Part 1), Vendor may assert so in the Attribute Questions and those shall be addressed during evaluation.

Vendor Agreement Signature Form (Part 1)
If responding to Part 1, this Vendor Agreement (Part 1) must be downloaded from this location, reviewed, Vendor Name placed in the line provided at the top, and uploaded to the "Response Attachments" location entitled "Vendor Agreement (Part 1)." If Vendor has proposed deviations to the Vendor Agreement, Vendor may leave the signature line of this page blank and assert so in the Attribute Questions and those shall be addressed during evaluation.

Reference Letters
Vendor is required to upload three Reference Letters from three separate customers as described herein. Vendor will be scored on the aggregate Reference Letters received from customers as described in the solicitation. Vendor must provide three current letters (issued within the 12-months preceding the date on which the solicitation was posted) from its customers verifying Vendor's customer service and reputation as described herein. (Ex. if the solicitation/bid posted on February 4, 2024, the letters must be dated on or after February 1, 2023). The letters must be issued from customers who have received goods or services from the Vendor or its current corporate officials, on entity/company letterhead, must specify its customer experience with Vendor, and must be signed by an authorized representative of the customer.

Required Confidentiality Claim Form
The Required Confidentiality Claim Form must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Required Confidentiality Claim Form. This is the only way for Vendor to assert confidentiality of any information submitted.

Conflict of Interest Questionnaire – Form CIQ
Do not upload this form unless you have a reportable conflict with TIPS. There is an Attribute entitled "Conflict of Interest Questionnaire Requirement" immediately followed by an Attribute entitled "Conflict of Interest Questionnaire Requirement – Form CIQ – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Conflict of Interest Questionnaire – Form CIQ must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Conflict of Interest Questionnaire – Form CIQ.

Disclosure of Lobbying Activities – Standard Form - LLL
Do not upload this form unless Vendor has reportable lobbying activities. There are Attributes entitled, "2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Disclosure of Lobbying Activities – Standard Form - LLL must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Disclosure of Lobbying Activities – Standard Form – LLL.

Current Form W-9
Vendor must upload their current IRS Tax Form W-9. The legal name, EIN, and d/b/a's listed should match the information provided herein exactly. This form will be utilized by TIPS to properly identify your entity.

Certificates & Licenses (Supplemental Vendor Information Only)
Optional. If Vendor would like to display any applicable certificates or licenses (including HUB certificates) for TIPS and TIPS Member Customer consideration, Vendor may upload those at the "Response Attachments" section requesting "Certificates & Licenses (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor's Warranties, Terms, and Conditions (Supplemental Vendor Information Only)
Optional. If Vendor would like to display any standard warranties, terms, or conditions which are often applicable to their offerings for TIPS and TIPS Member Customer consideration, Vendor may upload those at the "Response Attachments" section requesting "Vendor's Warranties, Terms, and Conditions (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Supplemental Vendor Information (Supplemental Vendor Information Only)
Optional. If Vendor would like to display or include any brochures, promotional documents, marketing materials, or other Vendor Information for TIPS and TIPS Member Customer consideration, Vendor may upload those at the "Response Attachments" section requesting "Supplemental Vendor Information (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor Logo (Supplemental Vendor Information Only)
Optional. If Vendor desires that their logo be displayed on their public TIPS profile for TIPS and TIPS Member viewing, Vendor may upload that logo at the "Response Attachments" section requesting "Vendor Logo (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

IV. SPECIFICATIONS

Category: Elevators and Servicing

Nothing herein is seeking services that are considered a public work/construction. This is a solicitation for goods and non-"public work" services only.

Specifications.
It is the intention of TIPS, as a Department of Region 8 ESC, to contract with quality vendors to supply elevators, elevator parts, and related non-construction services to public entity and qualifying non-profit TIPS Members in the United States. Proposals shall include, but not be limited to: elevator units, elevator components, elevator maintenance services, elevator repairs, modernization services, elevator inspections, elevator accessories, and elevator cleaning services. Proposals should include all listings of elevators, elevator parts, and related non-construction services that Vendor seeks to offer under the contract. Do not propose offerings that are not considered elevators, elevator parts, and related non-construction services. Accessories and parts to support elevators should be submitted. Servicing of elevators or any service related to elevators that Vendor seeks to offer under this contract should be submitted.

V. VENDOR PART 1 PRICING SUBMISSION

Pricing.
Please carefully read all of the following before submitting any pricing questions. All goods and service pricing shall be firm and calculable at the time of any TIPS Sale and must conform and comply with the Vendor's original pricing model as proposed in response to this solicitation. "To-Be-Determined" pricing is prohibited.

Submission of Goods/Items Pricing

TIPS permits Vendors to utilize either or both of the two goods/items pricing proposal options (and sub-options) identified below with the "Discount-Off Catalog" option being much more optimal, usable, and preferred to the "Cost-Plus Markup Option." With either or both options, Vendor is able to update their pricing and add/remove items during the life of the contract. It is Vendor's responsibility to ensure that all items listed, whether by description, product number, SKU, UPC or other, fall within the scope of this solicitation category. Please carefully read the description of both goods/items pricing options directly below:

- **Discount-Off Catalog Method**
  This goods/items pricing proposal method is highly preferred over the "Cost-Plus Markup Method" because it is versatile and allows Vendor to efficiently add and update its goods/items pricing and does not automatically prohibit federal fund purchases. Vendor is asked in the attribute questions within the eBid System to propose a minimum discount off of their catalog pricing. Please note that Vendor's "Minimum Percentage Discount Offered" proposed in the attribute questions shall apply to goods proposed with the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal such as a specific item-type with a limited profit margin. Vendor is asked in the attribute questions within the eBid System to propose a minimum discount off of their catalog pricing. Any discount from 0% to 100% is an appropriate response. A 0% discount is permitted. Then, under this pricing proposal method, Vendor is permitted to provide its "Catalog Pricing" to TIPS in a number of ways, described below. Please carefully read the following definition of "Catalog Pricing" which is broad and flexible to the usability benefit of the Vendor.

  "**Catalog Pricing**" is defined as, "The then available list of goods or services, in the most current listing regardless of date, that takes the form of a catalog, price list, price schedule, shelf-price or other viewable format that:

  A. is regularly maintained by the manufacturer or Vendor of an item; and

  B. is either published or otherwise available for review by TIPS or a customer during the purchase process;

  C. to which the Minimum Percentage Discount proposed by the proposing Vendor may be applied.

  Under the "Discount-Off Catalog Method, Vendor may supply TIPS its "Catalog Pricing" through any of the following methods. Please open the solicitation attachment entitled "Pricing Form 1" at this time and scroll through Sections A and B as you read this explanation.

  Options for Providing Goods/Items "Catalog Pricing" to TIPS:

  1. **Section "A" of Pricing Form 1 – Providing "Catalog Pricing" through Line-Item Pricing:** If Vendor desires to list the goods/items that you sell by line-item, you are welcome to do so in Section "A" of Pricing Form 1. You are welcome to modify the columns and column titles as long as TIPS can identify the item's name and "catalog price." Please note that if you are awarded with this type of pricing submission, you will be able to update the pricing and add/remove items as long as you honor any applicable discounts originally proposed.

  2. **Section "B" of Pricing Form 1 – (1) Catalog Pricing is Included in Proposal:** If Vendor already has "Catalog Pricing" documents or files compiled, Vendor may check this box and include a note directing TIPS to please view those documents/files. (Ex. X – Please see "Catalog Pricing" in uploaded document entitled "2022-2023 Vendor Catalog.") Please note that if you are awarded with this type of pricing submission, you will be able to update the pricing and add/remove items as long as you honor any applicable discounts originally proposed.

  3. **Section "B" of Pricing Form 1 – (2) Link to Catalog Pricing:** If Vendor already has "Catalog Pricing" published at an online location, Vendor may check this box and include the link to their online "Catalog Pricing." If a login is required to access the "Catalog Pricing" located at that link, please provide that login information in the cell to the right. (Ex. X – Please see "Catalog Pricing" at www.tips-usa.com, login information is Username: TIPS Password: 123456.) Please note that if you are awarded with this type of pricing submission, you will be able to update the online pricing and add/remove items as long as you honor any applicable discounts originally proposed.

4. **Section "B" of Pricing Form 1 – (3) Vendor Shall Provide "Catalog Pricing" Upon Request:** If Vendor does not have comprehensive "Catalog Pricing" documents or links readily available, Vendor may check this box ensuring that such required "Catalog Pricing" will be provided upon request. Per the following example, this option is viable but may slow down the TIPS Sale process as follows. (Ex. Vendor is awarded and is making its first TIPS Sale to Sunny ISD, Sunny ISD sends its TIPS PO to TIPS for pricing compliance review. TIPS will then request that Vendor provide documentation of "Catalog Pricing" for the line items included in the PO before TIPS can process the PO and send to Vendor for fulfillment.) Please note that if you are awarded with this type of pricing submission, you will always be able to provide the most current pricing for each item but you will still be required to honor any applicable discounts originally proposed.

- **<u>Cost-Plus Markup Method</u>**

This goods/items pricing proposal method is not recommended because many TIPS Members are prohibited from utilizing Vendors with a Cost-Plus Markup Pricing submission, especially when using federal funds. Vendor cannot be listed as federally compliant for TIPS purposes if Vendor utilizes this method. If Vendor has read through the entirety of the "Discount-Off Catalog Method" description above and has determined that none of those options are a possibility, then Vendor may use this method which will require Vendor to propose a maximum mark-up percentage in this proposal and then provide TIPS with proof of cost for each item at the time of each TIPS Sale.

Options for Selecting Cost-Plus Markup Method:

1. **Section "C" of Pricing Form 1:** If Vendor desires to utilize this method, Vendor may enter its maximum markup percentage the cell provided in Section "C" of Pricing Form 1. Please note that this is a maximum percentage and you may always have a lesser markup on a TIPS Sale. You will be required to provide proof of cost to TIPS for every item sold under the TIPS Contract. (Ex. Vendor is awarded and is making its first TIPS Sale to Sunny ISD, Sunny ISD sends its TIPS PO to TIPS for pricing compliance review. TIPS will then request that Vendor provide documentation of Vendor's cost for the line items included in the PO before TIPS can process the PO and send to Vendor for fulfillment.) Please note that if you are awarded with this type of pricing submission, you will always be able to provide the most current cost for each item but you will not be permitted to sell it to TIPS Members for a greater markup than what Vendor provides herein.

Submission of Service Pricing

Please note that Vendor's "Minimum Percentage Discount Offered" proposed in the attribute questions shall apply to services proposed with the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal such as vendor travel passed through at actual cost or GSA allowable rates. If Vendor does not seek to offer services under this contract, Vendor may type "N/A" on Pricing Form 2 and submit. If Vendor desires to offer services under this TIPS Contract, if awarded, the "Catalog Pricing" for those services must be included, or properly added, to Vendor's TIPS "catalog pricing" proposed herein. All services must be provided in some unit cost (Ex. Per Hour, Per Person, Per Day, etc.). TIPS now restates the definition of "Catalog Pricing" below for convenience:

"**Catalog Pricing**" is defined as, "The then available list of goods or services, in the most current listing regardless of date, that takes the form of a catalog, price list, price schedule, shelf-price or other viewable format that:

D. is regularly maintained by the manufacturer or Vendor of an item; and

E. is either published or otherwise available for review by TIPS or a customer during the purchase process;

F. to which the Minimum Percentage Discount proposed by the proposing Vendor may be applied.

Under the "Discount-Off Catalog Method, Vendor may supply TIPS its "Catalog Pricing" through any of the following methods. Please open the solicitation attachment entitled "Pricing Form 1" at this time and scroll through Sections A and B as you read this explanation.

Options for Providing Services "Catalog Pricing" to TIPS:

1. **Pricing Form 2 – Providing Service "Catalog Pricing" through Line-Item Pricing:** If Vendor desires to list the services that Vendor sells by line-item, Vendor is welcome to do so in Pricing Form 2. You are welcome to modify the columns and column titles as long as TIPS can identify the service being offered by name, unit-type, and the "catalog price" of the service. Please note that if you are awarded with this type of pricing submission, you will be able to update the pricing and add/remove services within the category as long as you honor any applicable discounts originally proposed.

2. **Service Catalog Pricing is Included in Proposal:** If Vendor already has service "Catalog Pricing" documents, links, or files compiled, Vendor may include a note on Pricing Form 2 directing TIPS to please view those documents/links/files. (Ex. X – Please see "Service "Catalog Pricing" in uploaded document entitled "2022-2023 Vendor Service Pricing.") Please note that if you are awarded with this type of pricing submission, you will be able to update the pricing and add/remove services within this category as long as you honor any applicable discounts originally proposed.

Additional Pricing Terms

1. **Maintaining and Updating TIPS Pricing During Contract.** Vendor agrees and understands that for each TIPS Contract that it is awarded, Vendor submitted, agreed to, and received TIPS' approval for specific pricing, discounts, and other pricing terms and incentives which make up Vendor's TIPS Pricing for that TIPS Contract ("TIPS Pricing"). Vendor may update their pricing during the life of the contract by highlighting the pricing changes and emailing pricing updates to bids@tips-usa.com for TIPS consideration/approval. Through this process, Vendor may: (1) add or remove items; (2) add or remove manufacturer/brands, and; (3) increase or decrease item pricing, as long as "catalog pricing" (or "cost" in very limited circumstances as described herein) is provided to TIPS upon request and Vendor honors all applicable discounts originally proposed. Vendor hereby certifies that Vendor shall only offer goods and services through this TIPS Contract if those goods and services are included in or added to Vendor's TIPS Pricing and approved by TIPS. TIPS reserves the right to review Vendor's pricing update requests as specifically as line-item by line-item to determine compliance. However, Vendor contractually agrees that all submitted pricing updates shall be within the original terms of the Vendor's TIPS Pricing (scope, proposed discounts, price increase limitations, and other pricing terms and incentives originally proposed by Vendor) such that TIPS may accept Vendors price increase requests as submitted without additional vetting at TIPS discretion.

2. **Brands.** If a name brand is included in this solicitation, proposals on any reputable manufacturers regularly produced equipment of such items of a similar nature or similar use which are substantively equivalent will be considered.

3. **TIPS Fee Considered.** Vendor confirms that all TIPS Pricing will not show adding the TIPS Administration Fee as a charge or line-item in a TIPS Sale.

4. **Vendor's Self-Imposed Pricing Limitations.** Within Vendor's TIPS Pricing, Vendor may include express, written limitations on geographical regions, volume of order, expediency, etc., for TIPS consideration and approval, as long as Vendor honors their applicable TIPS Pricing, proposed discounts, the terms and conditions of this Contract, and the terms and conditions of any Supplemental Agreement entered into directly with the customer TIPS Member. (Example: If Vendor sells nationally but a specific product can only be sold in Texas. Or, if Vendor can offer Members a greater discount if they purchase 50 items or more in one purchase, etc.)

5. **Shipping Cost, Bond Cost, and Taxes.** TIPS fees are not assessed to Vendors for shipping cost, required bond cost, or any taxes that may be applicable as long as they can be identified as separate line-items. For that reason, TIPS encourages Vendors not to include shipping price, bond price, or taxes within the TIPS "catalog pricing" for an item. If it is included in the TIPS price, TIPS will have no way to differentiate and the TIPS Administration fee will be assessed on the total.

VI. PART 1 PROPOSAL SCORING AND EVALUATION

TIPS evaluates and scores all responsive, properly submitted proposals. Recommendations for award will be made to the Region 8 Education Service Center Board of Directors. Awards are ratified or rejected at the monthly meeting of Region 8 ESC Board of Directors, or as delegated by the Board of Directors. TIPS utilizes a value approach and bases its award recommendations on several factors mandated by the Texas Education Code section §44.031. The factors are allotted points as described herein. TIPS reserves the right to assign or deduct any number of points in any given category if warranted due to insufficient response or Vendor stipulated exceptions and limitations. TIPS reserves the right to reject any or all proposals or any part of any proposal. TIPS is the sole arbiter of scoring. TIPS reserves the right to award multiple vendors for each solicitation.

The following evaluation criteria are mandated for consideration by Texas Education Code § 44.031 (b).

1. **Purchase Price**: **(22) Points.** Vendor shall submit, pursuant to the instructions included herein, specific pricing, discounts, and other pricing terms and incentives which make up Vendor's "TIPS Pricing." Points will be assigned based on the specific pricing as it relates to the current market, the discounts, and the other pricing terms and incentives proposed by Vendor.
2. **Reputation of Vendor and Vendor's Offerings: (3) Points.** Points will be assigned based on Vendor's references, to be submitted as instructed herein, any past history with Vendor, and any other information available to TIPS regarding Vendor's reputation.
3. **Quality of Vendor's Offerings: (21.5) Points.** Points will be assigned based on Vendor's references, to be submitted as instructed herein, any past history with Vendor, and any other information available to TIPS regarding the quality of Vendor's goods.
4. **Total Long-Term Cost to TIPS/TIPS Members to Acquire the Vendor's Offerings: (10) Points.** Points will be assigned based on Vendor's response to the Attribute entitled, "Honoring Vendor's Minimum Discount Percentage." If Vendor responds, "Yes", agreeing to honor their proposed TIPS Minimum Percentage Discount for the duration of the contract, Vendor will be awarded the maximum 10 points. A "No" response refusing to honor that proposed discount will be awarded 0 points.
5. **Extent to Which the Offerings Meet the Needs: (21.5) Points.** Points will be assigned based on whether the offerings proposed by Vendor fall within the scope of and meet the TIPS Member needs described in this solicitation.
6. **Vendor's Past Relationship: (10) Points.** Points will be assigned based on Vendor's past relationship with TIPS as an awarded TIPS Vendor. No past relationship with TIPS as an awarded TIPS Vendor will score 5 points, a poor past relationship with TIPS as an awarded TIPS Vendor will score 0-4 points, and a good past relationship with TIPS as TIPS Awarded Vendor will score 6-10 points.
7. **Impact on the Ability of TIPS Members to Comply with Laws and Rules Relating to Historically Underutilized Businesses ("HUB's"): (2) Points.** Points are assigned if, where applicable herein, Vendor agrees that if they anticipate subcontracting under this award, they will abide by the required affirmative steps provided in 2 CFR 200. Please see the corresponding Attribute Questions regarding, "Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms." A response that Vendor does anticipate subcontracting but does not agree to the federal subcontracting practices will give Vendor 0 points for this category and deem Vendor unacceptable to receive federal funds under this contract, any other responses accurate responses will give Vendor 2 points for this category.
8. **Experience: (10) Points.** Points will be assigned based on the number of years proposing Vendor has been operating the proposing business in this capacity as presented in response to the corresponding attribute question seeking the same. <2 years will receive 1 point, 2-3 years will receive 5 points, 4-5 years will receive 8 points, and > 5 years will receive 10 points.
9. **Residency: 0 Points.** For a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner: A. has its principal place of business in this state; or B. employs at least 500 persons in this state. Vendor's response to the corresponding attribute question will be considered, as required by law, but no points shall be assigned because federal funds may be utilized by TIPS Members, and residency is a prohibited criterion under federal regulation.

PROPOSERS FALLING BELOW AN 70-POINT THRESHOLD WILL NOT BE CONSIDERED FOR AN AWARD.

VII. TERMS & CONDITIONS

1. **Incorporation of Solicitation.** As previously stated, if Vendor proposes and is awarded, the specifications, terms, and conditions of this solicitation shall be incorporated by reference into the final, awarded TIPS Contract. In the event of conflict between the terms herein and the final Vendor Agreement, the terms and conditions which are in the best interest of governmental/qualifying non-profit TIPS Members shall control at TIPS sole discretion.

2. **Deviations.** If Vendor has proposed deviations to TIPS' standard terms, there is an Attribute Question where Vendor can assert that it has proposed negotiations. If Vendor responds to that attribute question asserting deviations, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document Vendor Agreement and instruct Vendor to include all requested negotiations as redline edits for TIPS consideration. This is the only proper way to submit proposed deviations for TIPS consideration. TIPS reserves the right to accept, decline, or modify Vendor's requested negotiated terms. For this reason, asserting deviations or negotiations may ultimately delay or prevent award.

3. **Term of the Agreement.** If awarded, the resulting Agreement with TIPS is for approximately three years with a one-year, consecutive option for renewal as described herein. Renewal options are not automatic and shall only be effective if offered by TIPS at its sole discretion. If TIPS offers a renewal option, the Vendor will be notified via email issued to Vendor's then-listed Primary Contact. The renewal option shall be deemed accepted by Vendor unless Vendor notifies TIPS of its objection to the renewal option in writing and confirms receipt by TIPS.

   Actual Effective Date: Agreement is effective upon signature by authorized representatives of both Parties. The Effective Date does not affect the "Term Calculation Start Date."

   Term Calculation Start Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, Vendor shall calculate the foregoing term as starting on the last day of the month that "Award Notifications" are anticipated as published in the Solicitation, regardless of the actual Effective Date.

   Example of Term Calculation Start Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 in this example.

   Contract Expiration Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, the term expiration date shall be three-years from the Term Calculation Start Date.

   Example of Contract Expiration Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 and the Contract Expiration Date of the resulting initial "three-year" term, (which is subject to an extension(s)) will be May 31, 2026 in this example.

   Option(s) for Renewal: Any option(s) for renewal shall begin on the Contract Expiration Date, or the date of the expiration of the prior renewal term where applicable, and continue for the duration specified for the renewal option herein.

   Example of Option(s) for Renewal: In this example, if TIPS offers a one-year renewal and the Contract Expiration Date is May 31, 2026, then the one-year renewal is effective from May 31, 2026 to May 31, 2027.

   TIPS may offer to extend Vendor Agreements to the fullest extent the TIPS Solicitation resulting in this Agreement permits.

4. **Termination.** If awarded, TIPS reserves the right to terminate the resulting agreement for cause or no cause for convenience with a thirty (30) days prior written notice. This Agreement may be terminated for cause by either party if the other party breaches the terms or materially defaults on the performance of any of its duties or obligations set forth herein ,provided that such default is not cured within thirty (30) days, or as otherwise may be agreed to by both parties, after written notice is given to the defaulting party by the non-defaulting party which specifies the faulty performance and acceptable means of correction. In such event, termination of the Agreement shall be effective as of the date specified in such notice of such termination. Upon termination, all TIPS Sale orders previously accepted by Vendor shall be fulfilled and Vendor shall be paid for all TIPS Sales executed pursuant to the applicable terms. All TIPS Sale orders presented to Vendor but not fulfilled by Vendor, prior to the actual termination of this agreement shall be honored at the option of the TIPS Member. TIPS shall submit to Vendor an invoice for any outstanding TIPS Administration Fees and approved expenses and Vendor shall pay such fees and expenses within 30 calendar days of receipt of such valid TIPS invoice. Vendor acknowledges and agrees that continued participation in TIPS is subject to TIPS' sole discretion and that any Vendor may be removed from the TIPS program at any time with or without cause. This termination clause does not affect TIPS Sales Supplemental Agreements pursuant to this term regarding termination and the Survival Clause term.

5. **TIPS Pricing.** Vendor agrees and understands that for each TIPS Contract that it holds, Vendor submitted, agreed to, and received TIPS' approval for specific pricing, discounts, and other pricing terms and incentives which make up Vendor's TIPS Pricing for that TIPS Contract ("TIPS Pricing"). Vendor confirms that Vendor will not add the TIPS Administration Fee as a charge or line-item in a TIPS Sale. Vendor hereby certifies that Vendor shall only offer goods and services through this TIPS Contract if those goods and services are included in or added to Vendor's TIPS Pricing and approved by TIPS. TIPS reserves the right to review Vendor's pricing update requests as specifically as line-item by line-item to determine compliance. However, Vendor contractually agrees that all submitted pricing updates shall be within the original terms of the Vendor's TIPS Pricing (scope, proposed discounts, price increase limitations, and other pricing terms and incentives originally proposed by Vendor) such that TIPS may accept Vendors price increase requests as submitted without additional vetting at TIPS discretion. Any pricing quoted by Vendor to a TIPS Member or on a TIPS Quote shall never exceed Vendor's TIPS Pricing for

any good or service offered through TIPS. Vendor certifies by signing this agreement that Vendor's TIPS Pricing for all goods and services included in Vendor's TIPS Pricing shall either be equal to or less than Vendor's current pricing for that good or service for any other customer. TIPS Pricing price increases and modifications, if permitted, will be honored according to the terms of the solicitation and Vendor's proposal, incorporated herein by reference.

6. **Initiation of TIPS Sales.** If awarded, when a public entity initiates a purchase with Vendor under this resulting contract, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Once verified, Vendor must include the TIPS Contract Number on all purchase communications and sales documents exchanged with the TIPS Member.

7. **TIPS Sales and Supplemental Agreements.** If awarded, when making a sale under this awarded contract, the terms of the specific TIPS order, including but not limited to: shipping, freight, insurance, delivery, fees, bonding, cost, delivery expectations and location, returns, refunds, terms, conditions, cancellations, order assistance, etc., shall be controlled by the purchase agreement (Purchase Order, Contract, Invoice, etc.) (hereinafter "Supplemental Agreement") entered into between the TIPS Member Customer and Vendor only. TIPS is not a party to any Supplemental Agreement. All Supplemental Agreements shall include Vendor's Name, as known to TIPS, and TIPS Contract Name and Number. Vendor accepts and understands that TIPS is not a legal party to TIPS Sales and Vendor is solely responsible for identifying fraud, mistakes, unacceptable terms, or misrepresentations for the specific order prior to accepting. Vendor agrees that any order issued from a customer to Vendor, even when processed through TIPS, constitutes a legal contract between the customer and Vendor only. When Vendor accepts or fulfills an order, even when processed through TIPS Vendor is representing that Vendor has carefully reviewed the order for legality, authenticity, and accuracy and TIPS shall not be liable or responsible for the same. In the event of a conflict between the terms of this TIPS Vendor Agreement document and those contained in any attachment, the provisions set forth herein shall control unless otherwise agreed to by the Parties in writing.

8. **Payment for TIPS Sales.** TIPS Members may make payments for TIPS Sales directly to Vendor, Vendor's Authorized Reseller, or as otherwise agreed to in the applicable Supplemental Agreement after receipt of the invoice and in compliance with applicable payment statutes. Regardless of how payment is issued or received for a TIPS Sale. Vendor is responsible for all reporting and TIPS Administration Fee payment requirements as required by the TIPS Contract.

9. **Right of Refusal.** If awarded, Vendor has the right not to sell to a TIPS Member under the awarded agreement at Vendor's discretion unless otherwise required by law.

10. **Reporting TIPS Sales**. If awarded, Vendor must report all TIPS Sales to TIPS. If a TIPS sale is initiated by Vendor receiving a TIPS Member's purchase order from TIPS directly, Vendor may consider that specific TIPS Sale reported. Otherwise, with the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the purchase order or similar purchase document (with Vendor's Name, as known to TIPS, and the TIPS Contract Name and Number included) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion. Please refer to the TIPS Accounting FAQ's for more information about reporting sales and if you have further questions, contact the Accounting Team at accounting@tips-usa.com.

11. **TIPS Administration Fees.** The collection of administrative fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The administration fee ("TIPS Administration Fee") is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of the amount paid by the TIPS Member for each TIPS Sale, less shipping cost, bond cost, and taxes if applicable and identifiable, which is legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published herein. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member, not on the Vendor's cost or on the amount for which the Vendor sold the item to a dealer or Authorized Reseller. Upon receipt of payment for a TIPS Sale, including partial payment (which renders TIPS Administration Fees immediately due), Vendor shall issue to TIPS the corresponding TIPS Administration Fee payment as soon as possible but not later than thirty-one calendar days following Vendor's receipt of payment. Vendor shall pay TIPS via check unless otherwise agreed to by the Parties in writing. Vendor shall include clear documentation with the issued payment dictating to which sale(s) the amount should be applied. Vendor may create a payment report within their TIPS Vendor Portal which is the preferred documentation

dictating to which TIPS Sale(s) the amount should be applied. Failure to pay all TIPS Administration Fees pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion as well as the initiation of collection and legal actions by TIPS against Vendor to the extent permitted by law. Any overpayment of participation fees to TIPS by Vendor will be refunded to the Vendor within ninety (90) days of receipt of notification if TIPS receives written notification of the overpayment not later than the expiration of six (6) months from the date of overpayment and TIPS determines that the amount was not legally due to TIPS pursuant to this agreement and applicable law. Any notification of overpayment received by TIPS after the expiration of six (6) months from the date that TIPS received the payment will render the overpayment non-refundable. Region 8 ESC and TIPS reserve the right to extend the six (6) month deadline if approved by the Region 8 ESC Board of Directors. TIPS reserves all rights under the law to collect TIPS Administration Fees due to TIPS pursuant to this Agreement.

12. **Confidentiality of Vendor Data.** Vendor understands and agrees that by signing this Agreement, all Vendor Data is hereby released to TIPS, TIPS Members, and TIPS third-party administrators to effectuate Vendor's TIPS Contract except as provided for herein. The Parties agree that Vendor Data is accessible by all TIPS Members as if submitted directly to that TIPS Member Customer for purchase consideration. If Vendor otherwise considers any portion of Vendor's Data to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code (the "Public Information Act") or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form which is required to be submitted as part of Vendor's proposal resulting in this Agreement and incorporated by reference. The Confidentiality Claim Form included in Vendor's proposal and incorporated herein by reference is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a Public Information Request. If TIPS receives a request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor Data deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law, including Attorney General determination and opinion. In the event that TIPS receives a written request for information pursuant to the Public Information Act that affects Vendor's interest in any information or data furnished to TIPS by Vendor, and TIPS requests an opinion from the Attorney General, Vendor may, at its own option and expense, prepare comments and submit information directly to the Attorney General stating why the requested information is exempt from disclosure pursuant to the requirements of the Public Information Act. Vendor is solely responsible for submitting the memorandum brief and information to the Attorney General within the time period prescribed by the Public Information Act. Notwithstanding any other information provided in this solicitation or Vendor designation of certain Vendor Data as confidential or proprietary, Vendor's acceptance of this TIPS Vendor Agreement constitutes Vendor's consent to the disclosure of Vendor's Data, including any information deemed confidential or proprietary, to TIPS Members or as ordered by a Court or government agency, including without limitation the Texas Attorney General. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation by TIPS Members or as required by law.

13. **Conflicts of Interest.** Vendor confirms that they have not offered, given, or accepted, nor intend to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, service to the other in connection with this Agreement. Vendor affirms that, to the best of Vendor's knowledge, its proposal has been arrived at independently, and is awarded without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this Agreement. Vendor agrees that it will/has disclosed any necessary affiliations with Region 8 Education Service Center and the TIPS Department, if any, through the Conflict of Interest attachment provided in the solicitation.

14. **Volume of TIPS Sales.** Nothing in this Agreement or any TIPS communication may be construed as a guarantee that TIPS or TIPS Members will submit any TIPS orders to Vendor at any time.

15. **Exclusivity.** Any award under this solicitation is non-exclusive and TIPS reserves the right to award multiple vendors or not award any vendors. TIPS reserves the right to re-issue a solicitation or solicit the same or similar solicitation categories for additional similar awards at any time at TIPS sole discretion.

16. **Best and Final Offer.** Vendor's proposal shall be their best and final offer although deviations may be addressed and Vendor's TIPS Pricing may be updated as provided for herein.

17. **LIMITATION OF LIABILITY – Waiver.** BY SUBMITTING A PROPOSAL, OFFERER EXPRESSLY AGREES TO WAIVE ANY CLAIM IT HAS OR MAY HAVE AGAINST BOTH THE INTERLOCAL PURCHASING SYSTEM REGION 8 EDUCATION SERVICE CENTER, ITS DIRECTORS, OFFICERS, ITS TRUSTEES, OR AGENTS ARISING OUT OF OR IN CONNECTION WITH (1) THE ADMINISTRATION, EVALUATION, RECOMMENDATION OF ANY PROPOSAL; (2) ANY REQUIREMENTS UNDER THE SOLICITATION, PROPOSAL PACKAGE, OR RELATED

DOCUMENTS; (3) THE REJECTION OF ANY PROPOSAL OR ANY PART OF ANY PROPOSAL; AND/OR (4) THE AWARD OF AN AGREEMENT, IF ANY. NEITHER REGION 8 ESC NOR TIPS SHALL BE RESPONSIBLE OR LIABLE FOR ANY COSTS INCURRED BY PROPOSERS OR THE SELECTED CONTRACTOR IN CONNECTION WITH RESPONDING TO THE SOLICITATION, PREPARING FOR ORAL PRESENTATIONS, PREPARING AND SUBMITTING A PROPOSAL, ENTERING OR NEGOTIATING THE TERMS OF AN AGREEMENT, OR ANY OTHER EXPENSES INCURRED BY A PROPOSER. THE PROPOSER OR SELECTED CONTRACTOR IS WHOLLY RESPONSIBLE FOR ANY SUCH COSTS AND EXPENSES AND SHALL NOT BE REIMBURSED IN ANY MANNER BY REGION 8 ESC OR TIPS.

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April 22, 2025

The Advocate
C/O Legal Notices (Martinisha Singleton)

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

CAPITAL CITY PRESS

Publisher of
THE ADVOCATE

PROOF OF PUBLICATION

The hereto attached notice was published in THE ADVOCATE, a daily newspaper of general circulation published in Baton Rouge, Louisiana, and the Official Journal of the State of Louisiana, City of Baton Rouge, and Parish of East Baton Rouge or published daily in THE TIMES-PICAYUNE/THE NEW ORLEANS ADVOCATE, in New Orleans Louisiana or published daily in THE ACADIANA ADVOCATE in the following issues:

5/1/2025, 5/8/2025

Joy Newman, Public Notices Representative

Sworn and subscribed before me, by the person whose signature appears above

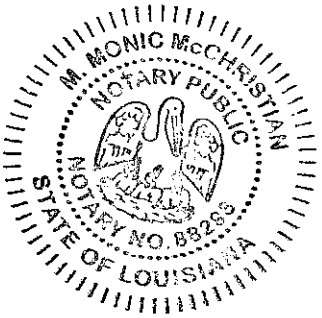
14 May 2025

M. Monic McChristian,

Notary Public ID#88293

State of Louisiana

My Commission Expires: Indefinite



Ad No: 137984

Brooke Scott - TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686

tions, please contact Integral Development at 404-224-1860.

138667-apr 30-may 2-3t
$629.98

PUBLIC NOTICE
- - -

Project: Wooddale Tower
Project Owner: Woodale Tower LLC
Project Address: 1885 Wooddale Blvd., Baton Rouge, LA 70806
Total Units: 88 Units (11 Efficiency, 66 One-Bedroom, 11 Two Bedrooms)
Project Contact: Michael Tubre
Phone Number: 504-373-5107

The project owner is making an application for the competitive 9% Low-Income Tax Credits (LIHTC) with the Louisiana Housing Corporation. Wooddale Tower is located at 1885 Wooddale Blvd., Baton Rouge, LA 70806. The project will have a maximum of 88 elderly only efficiency, one bedroom/one bath and two bedroom/one bath newly constructed multi-family housing units. Community facilities will be available in the project. The total development cost is $24,943,483 and will consist of $12,323,034.90 in LIHTC equity proceeds, $9,161,740.57 in State and Federal Historic Tax Credit Equity proceeds, $4,000,000 in a Non-LHC Loan.

138973-may 1-3-3t
$393.73

PUBLIC NOTICE

Public Hearings will be held at Zachary City Hall 4700 Main St. during a regular meeting of the Planning and Zoning Commission meeting- Monday, May 5, 2025 – 6:00 pm and the City Council meeting - Tuesday – May 27, 2025-6:30 pm for the purpose indicated:

**Site Plan —
Sherwood Park
5300-5400 Lower Zachary Road**

139092 May 1, 2, 3, 3t
$45.37

PUBLIC NOTICE

Public Hearings will be held at Zachary City Hall 4700 Main St. during a regular meeting of the Planning and Zoning Commission meeting- Monday, May 5, 2025 – 6:00 pm and the City Council meeting - Tuesday – May 27, 2025-6:30 pm for the purpose indicated:

**Site Plan — ABCO Holdings Group
20630 Plank Road**

139097 May 1, 2, 3, 3t
$44.38

PUBLIC NOTICE

Public Hearings will be held at Zachary City Hall 4700 Main St. during a regular meeting of the Planning and Zoning Commission meeting- Monday, May 5, 2025 – 6:00 pm and the City Council meeting - Tuesday – May 27, 2025-6:30 pm for the purpose indicated:

**Final Plat – Zachary Trails, Phase I
21511 Old Scenic Highway**

139102 May 1, 2, 3, 3t
$45.37

PUBLIC NOTICE
- - -

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at **www.tips-usa.com** for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

137984 May 1, 8, 2t
$214.68

PUBLIC NOTICE
- - -

TOWN OF ADDIS

PUBLIC HEARING NOTICE

REQUEST FOR REZONING

FIRST BAPTIST CHURCH OF ADDIS HAS FILED AN APPLICATION FOR REZONING OF PROPERTY LOCATED OFF OF HIGHWAY 1 SOUTH IN ADDIS NEAR 7126 HWY 1 SOUTH – WEST OF THE RAILROAD CROSSING.
LEGAL DESCRIPTION: 36.642 AC M/L SEC 25 26 67 & 68 T8S R12E LESS PORTION SUBD 47-100A (MB8 P264) WEST BATON ROUGE PARISH, ADDIS, LOUISIANA.

REQUESTING REZONING FROM AGRICULTURAL - 1 TO COMMERCIAL - 2.

THE TOWN OF ADDIS PLANNING AND ZONING COMMISSION WILL HOLD A PUBLIC HEARING ON THIS REQUEST ON TUESDAY, MAY 06, 2025 AT 6:00 P.M. AT THE ADDIS MUNICIPAL CENTER.

THE TOWN OF ADDIS' MAYOR AND TOWN COUNCIL WILL HOLD A PUBLIC HEARING ON THIS REQUEST ON TUESDAY, MAY 13, 2025 AT 6:00 P.M. AT THE ADDIS MUNICIPAL CENTER.

ALL INTERESTED PARTIES ARE INVITED TO COMMENT AND EXPRESS THEIR VIEWS ON THIS REQUESTED CHANGE IN ZONING.

ROBERT HEBERT
CHAIRPERSON – PLANNING & ZONING

DAVID H. TOUPS
MAYOR – TOWN OF ADDIS

PUBLISH 3 TIMES: APRIL 17, 2025, APRIL 24, 2025, MAY 01, 2025

136126 April 17, 24, May 1, 3t
$69.88

PUBLIC NOTICE
- - -

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM OR LIMITATION OF LIABILITY

CIVIL ACTION NO. 25-630

SECTION

JUDGE

MAG. JUDGE

NOTICE OF ACTION
BROUGHT FOR EXONERATION
FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving the M/V DIXIE LEE EYMARD which occurred on or about September 22, 2024 when it is alleged that Dwayne Johnlouis sustained injuries while working aboard a barge being moved by the M/V DIXIE LEE EYMARD.

All persons having such claims must file them as provided in the Federal Rules of Civil Procedure, Supplemental Rule F, with the Clerk of this Court, at the United States Courthouse, 500 Poydras Street, New Orleans, Louisiana, 70130 and serve copies on or mail copies to Complainant's attorneys, Mouledoux, Bland, Legrand & Brackett, attention: Michael Neuner, 701 Poydras Street, Suite 600, New Orleans, Louisiana 70139, on or before the ____ day of ________, 2025, or be defaulted. Personal attendance is not required.

Any claimant desiring to contest the right of Complainant to exoneration from liability or the right of Complainant to limitation of liability must file an answer to said Complaint, as required by the aforesaid Supplemental Rule F, and must serve on or mail to Complainant's attorneys a copy thereof, unless his claim has included an answer.

New Orleans, Louisiana, this ___ day of ____________, 2025.

UNITED STATES DISTRICT JUDGE

136387 April 17, 24, May 1, 8, 4t
$1,006.64

PUBLIC NOTICE
- - -

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM OR LIMITATION OF LIABILITY

CIVIL ACTION NO.

SECTION

JUDGE

MAG. JUDGE

NOTICE OF ACTION
BROUGHT FOR EXONERATION
FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving the M/V DIXIE LEE EYMARD which occurred on or about September 15, 2024 when it is alleged that Austin Landry sustained a leg injury while working aboard a barge being moved by the M/V DIXIE LEE EYMARD.

All persons having such claims must file them as provided in the Federal Rules of Civil Procedure, Supplemental Rule F, with the Clerk of this Court, at the United States Courthouse, 500 Poydras Street, New Orleans, Louisiana, 70130 and serve copies on or mail copies to Complainant's attorneys, Mouledoux, Bland, Legrand & Brackett, attention: Michael Neuner, 701 Poydras Street, Suite 600, New Orleans, Louisiana 70139, on or before the ____ day of ________, 2025, or be defaulted. Personal attendance is not required.

Any claimant desiring to contest the right of Complainant to exoneration from liability or the right of Complainant to limitation of liability must file an answer to said Complaint, as required by the aforesaid Supplemental Rule F, and must serve on or mail to Complainant's attorneys a copy thereof, unless his claim has included an answer.

New Orleans, Louisiana, this ___ day of ____________, 2025.

UNITED STATES DISTRICT JUDGE

136244 April 17, 24, May 1, 8, 4t
$1006.64

Public Notices Meet/Hear/Min

PUBLIC NOTICE

The Louisiana Department of Environmental Quality announces the following date for the meeting of the Louisiana Motor Fuels Underground Storage Tank Trust Fund Advisory Board:

Thursday, June 5, 2025
1:00 P.M.

The meeting will be conducted in the Galvez Building, 602 North Fifth Street, Baton Rouge, Louisiana 70802, in the Oliver Pollock room (Room # C-111).

Questions regarding the meeting can be directed to Ms. Danielle McCarty, Environmental Project Coordinator, at (225) 219-3541 or via email at Danielle.McCarty@la.gov.

139088 May 1, 1t
$33.62

Public Notices Nat Res Coastal

PUBLIC NOTICE
- - -

NOTICE the La. Dept. of Energy and Natural Resources, Office of Coastal Management (OCM) has received the following application(s) for a Coastal Use Permit (CUP) in accordance with the State and Local Coastal Resources Management Act of 1978, as amended, (La. R.S. 49:214.21-214.41), and the rules and regulations of the Coastal Resources Program. Applications for the proposed work may be inspected at 617 North 3rd Street, Room 1078, Baton Rouge, LA or on the OCM web page at: http://dnr.louisiana.gov/index.cfm?md=pagebuilder&tmp=home&pid=591. Copies may be obtained upon payment of cost of copying. Written comments, including suggestions for modifications or objections to the proposed work and stating the reasons thereof, are being solicited from the public. Comments must be received within 25 days of the date of publication of this notice. Comments should be uploaded to our electronic record, but may be mailed or emailed to the designated OCM Reviewer. All comments must contain the appropriate application number and the commenter's full name and contact information. Any person may request, in writing, within the comment period specified in this notice, that a State or Federal public hearing be held to consider this application. Requests for public hearings shall state, with particularity, the reasons for holding a public hearing and must contain the name and contact information of the requester. Below are the referenced application(s):
*********OCM: P. O. Box 44487, Baton Rouge, LA 70804-4487; Phone: (225) 342-9083; Email: melissa.sherman2@la.gov; OCM Reviewer: Melissa Sherman; **CUP NUMBER: P20250286** Name: Restoration Systems, Llc c/o Natural Resource Professionals, Llc 7330 Highland Road Suite B-1 Baton Rouge, LA 70808 Attn: Gregg Fell Location: Plaquemines Parish, LA; Lat 29-44-29.84N, Long 90-2-19.64W; Section 24 T15S R24E; Jesuit Bend Belle Chasse, 70037 Description: Proposed construction and maintenance of earthen berms at 4 hydrologic conveyance locations, and the construction and maintenance of fencing at 3 hydrologic conveyance locations. The purpose of the project is to minimize/prevent water hyacinth from entering existing shallow open water / unvegetated areas of the Jesuit Bend Mitigation Bank. Approx. 364.55 cy of material will be excavated and placed onsite.

139180 May 1, 1t
$30.35

Public Notices Successions

PUBLIC NOTICE
- - -

IN THE MATTER OF

THE SUCCESSION OF

OUIDA MAE LOCKWOOD SWENSON

NO. P-98316 DIV. 25

19TH JUDICIAL DISTRICT COURT

PARISH OF EAST BATON ROUGE

STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF OUIDA MAE LOCKWOOD SWENSON has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of SEVEN HUNDRED NINETY-FIVE THOUSAND AND NO/100 DOLLARS ($795,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:
One certain lot or parcel of ground, together with all the buildings and improvements thereon, and with all of the rights, ways, privileges, servitudes and appurtenances thereunto belonging, or in anywise appertaining, situated in the Parish of East Baton Rouge, State of Louisiana, in Sections 63 and 64, T8S, RIE, and being designated as LOT KK-13 as show on map prepared by R. L. Bennett, Registered Land Surveyor, dated May 6, 1977, and being entitled "Final Plat Kenilworth Way Map Showing the Resubdivision of a Portion of the Kenilworth Prop., Inc. Property Located in Sec. 63 & 64, T-8-S, R-I-E, East Baton Rouge Parish, Louisiana for Richard McDowell", a copy of said map being on file and of record in the office of the Clerk and Recorder for East Baton Rouge Parish in Map Book 169, page 355, said LOT KK-13 measuring Two Hundred Forty-six and 99/100 (246,99) feet front on Kenilworth Parkway by a depth on its southerly sideline along Highland Road of Two Hundred Six and 90/100 (206.90) feet, a depth on its northerly sideline of One Hundred Forty-two and 63/100 (142.63) feet, and measuring Two Hundred Fifty-seven and 38/100 (257.38) feet across its rear; subject to a Seven and 5/10 (7.5) foot servitude across the rear and a Five (5) foot sidewalk servitude across the front. Being the same property acquired by Wayne Douglas Swenson, Sr. and Ouida Mae Lockwood Swenson by act dated June 28, 1977 and recorded as Original 362, Bundle 9218.

The property herein is presently designated by the municipal number 120 Kenilworth Parkway, Baton Rouge, Louisiana 70808.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.
DOUG WELBORN
CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE
ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

139010-may 1-21-2t
$130.22

PUBLIC NOTICE
- - -

IN THE MATTER OF

THE SUCCESSION OF

OUIDA MAE LOCKWOOD SWENSON

NO. P-98316 DIV. 25

19TH JUDICIAL DISTRICT COURT

PARISH OF EAST BATON ROUGE

STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF OUIDA MAE LOCKWOOD SWENSON has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of FIFTY THOUSAND AND NO/100 DOLLARS ($50,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:
One (1) certain lot or parcel of ground, together with all buildings and improvements thereon and all of the rights, way, privileges, servitudes, appurtenances and advantages thereunto belonging or in anywise appertaining, situation in that subdivision in the City of Baton Rouge, Parish of East Baton Rouge, State of Louisiana, known as BUFFINGTON HEIGHTS, and being designated on a Map showing the resubdivision of Lots 6, 7, and 8, Buffington Heights in the City of Baton Rouge, Louisiana, for B.E. Perkins, Baton Rouge, Louisiana, January 17, 1964, recorded in the Office of the Clerk and Recorder of the aforesaid Parish and State on January 22, 1964, and Original 59, Bundle 5525, as LOT SIX-A (6A), said Lot 6A measuring sixty-five and 5/10 (65.5') feet front on the west side of Live Oak Boulevard by a depth between parallel and equal lines of one hundred two (102') feet, all as shown on said map.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.
DOUG WELBORN
CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE
ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

139013-may 1-21-2t
$107.98

PUBLIC NOTICE
- - -

IN THE MATTER OF THE SUCCESSION OF WAYNE DOUGLAS SWENSON, SR.

NO. P-98315 DIV. 25

19TH JUDICIAL DISTRICT COURT PARISH OF EAST BATON ROUGE
STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF WAYNE DOUGLAS SWENSON, SR. has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of FIFTY THOUSAND AND NO/100 DOLLARS ($50,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:

One (1) certain lot or parcel of ground, together with all buildings and improvements thereon and all of the rights, way, privileges, servitudes, appurtenances and advantages thereunto belonging or in anywise appertaining, situation in that subdivision in the City of Baton Rouge, Parish of East Baton Rouge, State of Louisiana, known as BUFFINGTON HEIGHTS, and being designated on a Map showing the resubdivision of Lots 6, 7, and 8, Buffington Heights in the City of Baton Rouge, Louisiana, for B.E. Perkins, Baton Rouge, Louisiana, January 17, 1964, recorded in the Office of the Clerk and Recorder of the aforesaid Parish and State on January 22, 1964, and Original 59, Bundle 5525, as LOT SIX-A (6A), said Lot 6A measuring sixty-five and 5/10 (65.5') feet front on the west side of Live Oak Boulevard by a depth between parallel and equal lines of one hundred two (102') feet, all as shown on said map.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.

DOUG WELBORN CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE

ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

138993-may 1-21-2t
$106.64

PUBLIC NOTICE
- - -

IN THE MATTER OF THE SUCCESSION OF WAYNE DOUGLAS SWENSON, SR.

NO. P-98315 DIV. 25

19TH JUDICIAL DISTRICT COURT PARISH OF EAST BATON ROUGE
STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF WAYNE DOUGLAS SWENSON, SR. has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of SEVEN HUNDRED NINETY-FIVE THOUSAND AND NO/100 DOLLARS ($795,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:
One certain lot or parcel of ground, together with all the buildings and improvements thereon, and with all of the rights, ways, privileges, servitudes and appurtenances thereunto belonging, or in anywise appertaining, situated in the Parish of East Baton Rouge, State of Louisiana, in Sections 63 and 64, T8S, RIE, and being designated as LOT KK-13 as show on map prepared by R. L. Bennett, Registered Land Surveyor, dated May 6, 1977, and being entitled "Final Plat Kenilworth Way Map Showing the Resubdivision of a Portion of the Kenilworth Prop., Inc. Property Located in Sec. 63 & 64, T-8-S, R-I-E, East Baton Rouge Parish, Louisiana for Richard McDowell", a copy of said map being on file and of record in the office of the Clerk and Recorder for East Baton Rouge Parish in Map Book 169, page 355, said LOT KK-13 measuring Two Hundred Forty-six and 99/100 (246,99) feet front on Kenilworth Parkway by a depth on its southerly sideline along Highland Road of Two Hundred Six and 90/100 (206.90) feet, a depth on its northerly sideline of One Hundred Forty-two and 63/100 (142.63) feet, and measuring Two Hundred Fifty-seven and 38/100 (257.38) feet across its rear; subject to a Seven and 5/10 (7.5) foot servitude across the rear and a Five (5) foot sidewalk servitude across the front. Being the same property acquired by Wayne Douglas Swenson, Sr. and Ouida Mae Lockwood Swenson by act dated June 28, 1977 and recorded as Original 362, Bundle 9218.
The property herein is presently designated by the municipal number 120 Kenilworth Parkway, Baton Rouge, Louisiana 70808.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.

DALE ATKINS CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE

ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

139006-may 1-21-2t
$127.52

WBR Public Notices

WBR Public Notices Meet/Hear/Min

PUBLIC NOTICE
- - -

NOTICE

The dates of the West Baton Rouge Parish School Board Committee meeting and regular board meeting for May are listed below:

Committee Meeting/s:
Tuesday, May 13, 2025
Location:
3761 Rosedale Road
Port Allen, LA 70767

Regular Board Meeting:
Wednesday, May 21, 2025
Location:
Cohn Elementary
Multi-purpose Building
805 N. 14th Street
Port Allen, LA 70767

G. Alden Chustz Jr.
President
West Baton Rouge
School Board

Publish Dates:
April 24, 2025
May 1, 2025
May 8, 2025
May 15, 2025

137454 April 24, May 1, 8, 15, 4t
$51.44

SHERIFF'S SALE

SUIT NO. 49779

FEDERAL HOME LOAN MORTGAGE CORPORATION VS SHARON ANN PRATT

18TH JUDICIAL DISTRICT COURT PARISH OF WEST BATON ROUGE STATE OF LOUISIANA

SUIT NO. 49779

BY VIRTUE OF A WRIT OF SEIZURE AND SALE TO ME, DIRECTED BY THE HONORABLE THE EIGHTEENTH JUDICIAL DISTRICT COURT, FOR THE PARISH OF WEST BATON ROUGE, IN THE ABOVE ENTITLED CAUSE, I WILL PROCEED TO SELL BY PUBLIC AUCTION, IN FRONT OF THE COURTHOUSE DOOR, ON THE 4TH DAY OF JUNE, 2025 AT TEN O'CLOCK (10:00) A.M., THE FOLLOWING DESCRIBED PROPERTY:

A certain lot or parcel of ground, together with all of the buildings and improvements thereon being and belonging and with all the rights, ways, privileges, and servitudes, thereunto appertaining, situated in the Westriver Subdivision near the Town of Addis, Parish of West Baton Rouge, Louisiana, and designated on map of said subdivision prepared by A. J. Parker, C.E., on October 6, 1956, and recorded on Page 69 of the map book of the Parish of West Baton Rouge as Lot 167. This lot measures 100 feet front on Myrle Drive, by a depth between parallel lines of 120 feet, and is bounded on the North by Myrle Drive, on the East by Sybil Street, on the South by Lot 172 and on the West by Lot 168. See C.B. 130, E. 208; C.B. 114, E. 53 of the conveyance records of West Baton Rouge, Louisiana

MUNICIPAL ADDRESS IS: 5125 MYRLE DRIVE, ADDIS, LA 70710

SEIZED IN THE ABOVE SUIT.

TERMS OF SALE: CASH TO THE HIGHEST BIDDER WITH BENEFIT OF APPRAISEMENT, AND ACCORDING TO LAW.

JEFF BERGERON, SHERIFF PARISH OF WEST BATON ROUGE
BY: ANGIE DELAUNE DEPUTY SHERIFF

ADVERTISE IN THE ADVOCATE ON: 5/1/25 & 5/29/25
138701
$56.05

SHERIFF'S SALE

SUIT NO. 49884

FEDERAL NATIONAL MORTGAGE ASSOCIATION vs DAVID P. JAMES, SR., A/K/A DAVID JAMES, SR., A/K/A DAVID P. JAMES, A/K/A DAVID JAMES AND JUDY JULIEN JAMES, A/K/A JUDY J. JAMES, A/K/A JUDY JAMES

18TH JUDICIAL DISTRICT COURT PARISH OF WEST BATON ROUGE STATE OF LOUISIANA

SUIT NO. 49884

BY VIRTUE OF A WRIT OF SEIZURE AND SALE TO ME, DIRECTED BY THE HONORABLE THE EIGHTEENTH JUDICIAL DISTRICT COURT, FOR THE PARISH OF WEST BATON ROUGE, IN THE ABOVE ENTITLED CAUSE, I WILL PROCEED TO SELL BY PUBLIC AUCTION, IN FRONT OF THE COURTHOUSE DOOR, ON THE 4TH DAY OF JUNE, 2025 AT TEN O'CLOCK (10:00) A.M.,

THE FOLLOWING DESCRIBED PROPERTY:
A certain tract or parcel of land together with all buildings and improvements thereon, situated in West Baton Rouge Parish, State of Louisiana, being more fully designated as lot number thirty-nine (39), in West Side Gardens Subdivision, as shown on the plat by Woody R. Triche, P.L.S., entitled "Final plat West Side Gardens Subdivision Lots 1-43 and the re-subdivision of Tract I-B-1-B into Tract I-B-1-B-1 being a portion of the Louis Cohn and Mrs. Julia Cohn Marks property located in Section 67, T-7-S, R-12-E, Southeast Land District, City of Port Allen, West Baton Rouge Parish, Louisiana, for Fontaine/Ward Properties, LLC and DBB LLC", recorded in conveyance book 440, entry number 204 in the records of West Baton Rouge Parish, Louisiana.

MUNICIPAL ADDRESS IS: 289 MELISSA AVENUE, PORT ALLEN, LA 70767

SEIZED IN THE ABOVE SUIT.

TERMS OF SALE: CASH TO THE HIGHEST BIDDER WITH BENEFIT OF APPRAISEMENT,AND ACCORDING TO LAW.

JEFF BERGERON, SHERIFF PARISH OF WEST BATON ROUGE
BY: ANGIE DELAUNE DEPUTY SHERIFF

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Legal Notices

emergency involving public safety. The conditions and circumstances requiring this emergency purchase is for Energy Recovery Ventilator at LC-Library. The amount of this expenditure is $108,731.00 and issued to Mid-South Equipment Sales & Services LLC 5751 River Road New Orleans, La. 70123.

139795-MAY 8-1T
$

PUBLIC NOTICE

Notice of Hearing on Proposed 2025-26 Budget for Discovery Health Sciences Foundation, Inc. - Baton Rouge Ochsner Discovery

Monday, June 2, 2025 @ 4:30pm
Kenner Discovery, 3837 Loyola Drive, Kenner, LA 70065, Room B301

(Hearings may last approximately one hour)

For at least ten calendar days before its Public Hearing, the school's proposed budget will be available for public inspection online via the school's website or during school hours in its Main Office.

Baton Rouge Ochsner Discovery does not discriminate in the rendering of services to/or employment of individuals because of race, color, religion, sex, age, national origin, disability, veteran status or any other characteristic protected by law.

139926-may 8-1t
$132.61

PUBLIC NOTICE

OFFICIAL NOTICE OF THE INTENT OF THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT TO LEVY AND COLLECT A 1% SALES AND USE TAX AND A 1% HOTEL OCCUPANCY TAX WITHIN THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT

The Louisiana State University Economic Development District **("District")**, a political subdivision of the State of Louisiana **("State")**, is an economic development district established by the State Legislature pursuant to R.S. 33:9038.76 **("Enabling Act")**, subject to the provisions of Chapter 27 of Title 33 of the Louisiana Revised Statutes of 1950, as amended (La. R.S. 33:9038.29 through 33:9038.42, inclusive) (collectively, **"Acts"**), and other constitutional and statutory authority.

Pursuant to the Acts, the District is empowered to levy and collect up to two percent (2%) of sales and use taxes, or up to two percent (2%) of hotel occupancy taxes, or any combination of such taxes, above and in addition to any other ad valorem taxes, sales taxes, or hotel occupancy taxes, or combination of such taxes, then in existence or permitted to be in existence in the District.

The public is hereby notified that the Board of Commissioners of the District, the governing authority of the District **("Board")**, intends to adopt a resolution authorizing the levy and collection of (a) a one percent (1%) tax upon the sale at retail, the use, the lease or rental, the consumption and storage for use or consumption of tangible personal property and on sales of services in the District and (b) a one percent (1%) hotel occupancy tax within the District commencing July 1, 2025 (collectively, **"New Tax"**).

The projects approved and funded by the District utilizing the New Tax will create economic development benefits to the City of Baton Rouge and the State of Louisiana.

PURSUANT TO LA. R.S. 38:9038.76, THE PUBLIC IS HEREBY NOTIFIED THAT THE BOARD OF COMMISSIONERS OF THE DISTRICT WILL MEET IN OPEN AND PUBLIC SESSION TO HOLD A PUBLIC HEARING TO HEAR ANY OBJECTIONS BY THE PUBLIC TO THE PROPOSED LEVY OF THE NEW TAX AND TO CONSIDER APPROVING THE LEVY AND COLLECTION OF THE NEW TAX BY ADOPTING THE ABOVE DESCRIBED RESOLUTION AT ITS MEETING TO BE HELD ON THURSDAY, MAY 22, 2025, 1:30 P.M., AT THE LSU FOUNDATION, THIRD-FLOOR TRAINING ROOM, 3796 NICHOLSON DRIVE, BATON ROUGE, LA 70802.

139917-my 8-15-2t
$617.94

PUBLIC NOTICE

OFFICIAL NOTICE OF THE INTENT OF THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT TO LEVY AND COLLECT A 1% SALES AND USE TAX AND A 1% HOTEL OCCUPANCY TAX WITHIN THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT

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139917-my 8-15-2t
$617.94

PUBLIC NOTICE

Summary of Public Notice:

Project Owner: Sharlo Senior Apartments, LP
Project Name: Sharlo Senior Apartments
Project Address: 1808 Brightside Dr. Baton Rouge, LA
Total Units: 90 – Senior Housing Units
Mix of Units: (1 and 2 bedroom units)

The project owner is proposing the rehabilitation of the Sharlo Senior Apartments development, which is a 90-unit Seniors (62+) housing development. The development will consist of a community facility and supportive services which will be available for the tenants. The applicant is applying for a reservation of 9% LIHTCs from the Louisiana Housing Corporation.

The total estimated development cost is $ 17,600,000. The development will be funded with private financing and equity proceeds from the sale of Low-Income Housing Tax Credit and other financing provided as follows (Amounts are estimated):

Permanent Financing $ 5,600,000

LIHTC Equity $ 9,100,000

Deferred Developer Fee $ -

Other: $ 2,900,000

Total sources of funds $ 17,600,000

NOTE: Please contact Rae Wilder at rae.wilder@ccinvest.com for any questions regarding this notice.

139934-may 8-10-3t
$554.59

PUBLIC NOTICE

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at **www.tips-usa.com** for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Escalators (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

137984 May 1, 8, 2t
$214.68

PUBLIC NOTICE

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM OR LIMITATION OF LIABILITY

CIVIL ACTION NO. 25-630

SECTION

JUDGE

MAG. JUDGE

NOTICE OF ACTION BROUGHT FOR EXONERATION FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving the M/V DIXIE LEE EYMARD which occurred on or about September 22, 2024 when it is alleged that Dwayne Johnlouis sustained injuries while working aboard a barge being moved by the M/V DIXIE LEE EYMARD.

All persons having such claims must file them as provided in the Federal Rules of Civil Procedure, Supplemental Rule F, with the Clerk of this Court, at the United States Courthouse, 500 Poydras Street, New Orleans, Louisiana, 70130 and serve copies on or mail copies to complainant's attorneys, Mouledoux, Bland, Legrand & Brackett, attention: Michael Neuner, 701 Poydras Street, Suite 600, New Orleans, Louisiana 70139, on or before the ____ day of _____, 2025, or be defaulted. Personal attendance is not required.

Any claimant desiring to contest the right of Complainant to exoneration from liability or the right of Complainant to limitation of liability must file an answer to said Complaint, as required by the aforesaid Supplemental Rule F, and must serve on or mail to Complainant's attorneys a copy thereof, unless his claim has included an answer.

New Orleans, Louisiana, this ____ day of _____, 2025.

UNITED STATES DISTRICT JUDGE

136387 April 17, 24, May 1, 8, 4t
$1,006.64

PUBLIC NOTICE

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM

OR LIMITATION OF LIABILITY

CIVIL ACTION NO.

SECTION

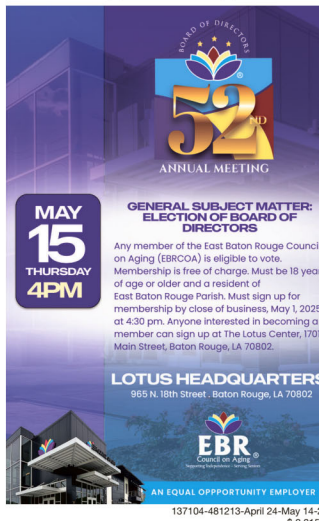
JUDGE

MAG. JUDGE

NOTICE OF ACTION BROUGHT FOR

EXONERATION FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving



137104-481213-April 24-May 14-21x
$ 2,215.29

Louisiana Public Facilities Authority

On motion of Trustee Guidry, seconded by Trustee Cheramie, the following resolution was adopted:

RESOLUTION

A resolution making certain findings with respect to and authorizing the issuance of not exceeding $159,000,000 aggregate principal amount of Louisiana Public Facilities Authority Revenue Bonds (Acadiana Renaissance Charter Academy Project) in one or more series, on a taxable or tax-exempt basis; approving the form and authorizing the execution and delivery of a Trust Indenture, a Loan Agreement and a Bond Purchase Agreement for the Bonds; approving the distribution of a Preliminary Limited Offering Memorandum and a final Limited Offering Memorandum for said Bonds; approving the sale of the Bonds; ratifying the publication of a Notice of Sale of Bonds and a Notice of Public Hearing; authorizing the execution of other documents in connection therewith; authorizing the officers and trustees of the Authority to do all things necessary to effectuate this resolution; and providing for other matters in connection with the foregoing.

WHEREAS, the Louisiana Public Facilities Authority (the "Authority") is a public trust and public corporation of the State of Louisiana (the "State") created and existing pursuant to the provisions of Chapter 2-A of Title 9 of the Louisiana Revised Statutes of 1950, as amended (the "Act"), and is authorized and empowered by law, including particularly the provisions of the Act, to issue its revenue bonds for the purpose of financing, acquiring, constructing, purchasing, equipping, maintaining, installing, leasing, subleasing, holding, extending, enlarging, remodeling, storing, operating, repairing and administering educational services and facilities; and

WHEREAS, the Authority adopted a resolution on March 12, 2025, authorizing the execution of a preliminary agreement between the Authority and Friends of Lafayette Charter Foundation, Inc., a Louisiana nonprofit corporation (the "Borrower"), authorizing the issuance of revenue bonds in one or more series, on a taxable or tax-exempt basis pursuant to the Act and authorizing the form of and publication of a Notice of Sale of Bonds and a Notice of Public Hearing; and

WHEREAS, the State Bond Commission (the "Commission") on April 22, 2025, granted its approval of the issuance by the Authority of its revenue bonds in the aggregate principal amount of not exceeding $159,000,000 in one or more series; and

WHEREAS, the Borrower has requested that the Authority issue in one or more series not exceeding $159,000,000 Louisiana Public Facilities Authority Revenue Bonds (Acadiana Renaissance Charter Academy Project) Series 2025 (the "Bonds") for the purposes of (i) financing the acquisition of buildings and other improvements constructed on leased land upon which is located the Acadiana Renaissance Charter Academy (the "School"), a kindergarten through twelfth grade, tuition free, public charter school in Youngsville, Louisiana (the "Project"), (ii) funding one or more reserve funds, and (iii) paying the costs of issuance of the Bonds (collectively, the "Project"), pursuant to an Trust Indenture (the "Indenture"), between the Authority and Regions Bank (the "Trustee"), the proceeds of which Bonds are to be loaned to the Borrower pursuant to a Loan Agreement between the Authority and the Borrower (the "Loan Agreement"); and

WHEREAS, multiple separate limited liability companies of which Red Apple Development, LLC is the sole member (collectively, the "Ground Lessor") own the parcels of land on which the School is located (the "Land") and at delivery of the Bonds, it is expected that they will lease the Land and the School located thereon to the Borrower which will sublease the land and lease the Project to Lafayette Charter Foundation, Inc. (the "Operator") which will have a leasehold interest in the Project pursuant to which it will make rental payments under one or more agreements providing for such lease and sublease (collectively, the "Facilities Lease and Ground Sublease Agreement"); and

WHEREAS, pursuant to the Loan Agreement, the Borrower will agree to make payments in an amount sufficient to make timely payments of principal of, premium, if any, and interest on the Bonds and to pay such other amounts as are required by the Loan Agreement; and

WHEREAS, all requirements of the Commission evidenced by its rules and regulations, including but not limited to notice to local legislators, have been complied with; and

WHEREAS, the Authority is authorized under the provisions of the Act and other constitutional and statutory authority to issue and sell the Bonds for such purposes and the Authority has determined that it is most advantageous to the Authority and necessary for it to issue its revenue bonds as hereinafter provided for such purposes; and

WHEREAS, the Authority has determined that the issuance and sale of the Bonds and the use of the proceeds thereof as described herein will be in furtherance of the public purposes intended to be served by the Act; and

WHEREAS, all consents and approvals required to be given by public bodies in connection with the authorization, issuance and sale of the Bonds as authorized by the Indenture and as required by the Act have been or will be secured prior to the delivery of the Bonds; and

WHEREAS, Herbert J. Sims & Co., Inc. (the "Underwriter"), has prepared and submitted to the Operator, the Borrower, and the Authority a Preliminary Limited Offering Memorandum and will prepare and submit to the Operator, the Borrower and the Authority a final Limited Offering Memorandum for use in connection with the offer and sale of the Bonds; and

WHEREAS, the Underwriter proposes to arrange for the purchase of the Bonds in accordance with the terms of a bond purchase agreement by and among the Underwriter, the Borrower, the Operator and the Authority (the "Bond Purchase Agreement") with respect to the Bonds; and

WHEREAS, the Authority now desires to fix the details necessary with respect to the issuance and sale of the Bonds, to authorize the execution and delivery of the Loan Agreement, the Indenture and the Bond Purchase Agreement, to ratify the publication of a Notice of Public Hearing and a Notice of Sale of Bonds, to authorize the sale of the Bonds, and to provide for the execution of certain instruments, documents and certificates in connection therewith; and

NOW, THEREFORE, BE IT RESOLVED by the Louisiana Public Facilities Authority that:

SECTION It is the public purpose and within the power and authority vested in the Authority under the Act to provide funds for the financing of the Project through the issuance of the Bonds as limited and special revenue obligation bonds of the Authority. The financing of the Project through the issuance of the Bonds will foster and be in furtherance of the objectives of the Act by providing for and assisting in furthering the educational purposes of the State and its inhabitants.

SECTION The Authority hereby authorizes the issuance of the Bonds as Louisiana Public Facilities Authority Revenue Bonds (Acadiana Renaissance Charter Academy Project) with an appropriate series designation for the purposes of (i) financing the acquisition of Acadiana Renaissance Charter Academy, a kindergarten through twelfth grade, tuition free, public charter school in Youngsville, Louisiana, (ii) funding one or more reserve funds, and (iii) paying the costs of issuance of the Bonds. The Bonds shall be issued in the total aggregate principal amount of not exceeding $159,000,000 and shall be issued as fully registered bonds in the denomination of $100,000 or any integral multiple of $5,000 in excess thereof, shall mature not later than June 15, 2059, and shall bear interest at a fixed or variable rate not to exceed 7.13% per annum on a tax-exempt or taxable basis, all as set forth in the Indenture.

SECTION The Authority hereby authorizes the sale of the Bonds to the Underwriter pursuant to the terms of the Bond Purchase Agreement to be entered into by and among the Underwriter, the Borrower, the Operator and the Authority. The sale of all or a portion of the Bonds to the Underwriter at a price of not less than 90% of the principal amount thereof (inclusive of underwriter's discount in an amount not exceeding 3% of the principal amount thereof) is hereby approved.

SECTION The form, terms and provisions of the Indenture and the Loan Agreement are hereby approved in substantially the same form as submitted to the Authority and filed with the official minutes of the Authority, all of the provisions of which are hereby made a part of this resolution, with such additions, omissions and changes as may be approved by bond counsel to the Authority. The Chairman or Vice Chairman and the Secretary-Treasurer or an Assistant Secretary of the Authority be and they are hereby authorized, empowered and directed to execute the Indenture, the Loan Agreement and the Bond Purchase Agreement for, on behalf of and in the name of the Authority, in accordance with the provisions and requirements of the Act.

The Bonds are issued under and secured by the Indenture which provides a complete description of the pledged property and revenues constituting the Trust Estate, as defined in the Indenture (which includes, among other things, all of the Authority's rights, title and interest in and to payments under the Loan Agreement and mortgages on the facilities and assignments of leases and rents by the Borrower and by the Ground Lessor in favor of Regions Bank), the nature and extent of the security, a statement of the terms and conditions on which the Bonds are issued and secured; the rights, duties and obligations of the Authority, the rights, duties and immunities of the Trustee, and the rights of the owners of the Bonds.

The Bonds are hereby expressly authorized to be signed by the Chairman or Vice Chairman of the Authority, said signatures shall be attested by the signature of the Secretary-Treasurer or an Assistant Secretary of the Authority, and the signatures of the Chairman or Vice Chairman and Secretary-Treasurer or Assistant Secretary may be evidenced by their facsimile signatures.

The Bonds are limited and special obligations of the Authority and do not constitute or create an obligation, general or special, debt, liability or moral obligation of the State or of any political subdivision thereof, within the meaning of any constitutional or statutory provisions whatsoever, and neither the faith or credit nor the taxing power of the State or of any political subdivision thereof is pledged to the payment of the principal of, premium, if any, or the interest on the Bonds. The Bonds are not general obligations of the Authority (which has no taxing power and receives no funds from any governmental body), but they are limited and special revenue obligations of the Authority payable from the income, revenues and receipts derived or to be derived from payments made pursuant to the Loan Agreement and the Borrower's lease of the Project to the Operator, and are further secured by the Multiple Indebtedness Leasehold Mortgages, Assignment and Pledge of Leases and Rents and Security Agreements by the Borrower in favor of the Mortgagee and the Multiple Indebtedness Mortgages, Assignment and Pledge of Leases and Rents and Security Agreement by the Ground Lessor in favor of the Mortgagee.

SECTION The Authority hereby ratifies the publication of (i) the Notice of Public Hearing on the website of the Authority on April 2, 2025, and (ii) the Notice of Sale of Bonds in The Advocate and The Bond Buyer on April 23, 2025.

SECTION This Board of Trustees does hereby authorize the distribution by the Underwriter of a Preliminary Limited Offering Memorandum and a final Limited Offering Memorandum in connection with the sale of the Bonds; provided, however, that neither this Board of Trustees nor the Authority makes any representation or warranty, either express or implied, as to the accuracy or completeness of the information contained therein (other than under the heading "INTRODUCTION – Authority to Issue," "THE ISSUER" and "ABSENCE OF MATERIAL LITIGATION - The Issuer"). The Chairman or Vice Chairman of this Board of Trustees is hereby authorized, empowered and directed to execute and deliver the Limited Offering Memorandum to the Underwriter in accordance with the terms of the Bond Purchase Agreement.

SECTION The Chairman or Vice Chairman and Secretary-Treasurer or Assistant Secretary of the Authority shall have prepared and shall execute for and on behalf of the Authority the Bonds, and shall deliver the same to the Trustee for authentication. The Trustee shall, upon authentication of the Bonds, deliver the same in one or more series to the Underwriter in accordance with the Indenture and the Bond Purchase Agreement and shall receive from the Underwriter for the account of the Authority the purchase price and shall hold the proceeds of the Bonds in the funds and accounts as prescribed in the Indenture. The Trustee is hereby requested and authorized to authenticate the Bonds.

SECTION The Chairman or the Vice Chairman and the Secretary-Treasurer or an Assistant Secretary of the Authority are hereby further authorized and directed, for and on behalf of the Authority, to accept, receive, execute, seal, attest and deliver all such documents, certificates and other instruments as are required, necessary, convenient and appropriate in connection with the authorization, issuance, sale and delivery of the Bonds, the Indenture and the Loan Agreement, including, but not limited to, the Tax Regulatory Agreement by and among the Authority, the Trustee, the Borrower and the Operator, and to take such further action as may be required by the Commission or bond counsel to the Authority or appropriate or required by law in connection with the authorization, issuance, sale and delivery of the Bonds. Said officers are hereby further authorized and directed to approve for, on behalf of, and in the name of the Authority any changes, additions or deletions in any of the documents, instruments or certificates referred to in this resolution, provided that all such changes, additions or deletions, if any, shall be approved by bond counsel to the Authority and shall be consistent with the authority provided by the Act. The signatures of the said Chairman, Vice Chairman, Secretary-Treasurer or Assistant Secretary upon such documents set forth above, or as may be otherwise required for or necessary, convenient or appropriate to the financing described in this resolution, are deemed to be conclusive evidence of their due exercise of the authority vested in them hereunder.

SECTION The Chairman or Vice Chairman of the Authority are hereby further authorized to take such action as is necessary, on the advice of bond counsel to the Authority, to effectuate and implement this resolution including the publication hereof as required by the Act.

SECTION ~~By virtue of the Authority's application~~ for, acceptance and utilization ~~of the benefits of the State~~ Bond Commission's approval, the Authority ~~understands and agrees that such approval~~ is expressly conditioned ~~upon, and further understands, agrees and~~ binds itself, its successors and ~~assigns, to full and continuing compliance~~ with the "State Bond Commission ~~Policy on Approval of Proposed~~ Use of Swaps, or other forms of Derivative Products, Hedges, Etc.," adopted by the Commission on July 20, 2006, as to the borrowing and other matters subject to the approval, including approval under said Policy of the implementation or use of any swaps or other products or enhancements covered thereby.

SECTION This resolution shall be published one time in the official journal of the Authority.

SECTION This resolution shall become effective immediately.

This resolution having been submitted to a vote, the vote thereon was as follows:

Member	Yea	Nay	Absent	Abstaining
Ronald H. Bordelon	X			
Craig A. Cheramie	X			
David W. Groner	X			
Casey R. Guidry	X			
Dannye W. Malone	X			
Heather C. Songy	X			
Matthew T. Valliere				X

This resolution declared adopted on this 30th day of April, 2025.

(Other items of business not pertinent to the foregoing resolution and the documents mentioned therein may be found in the official minutes of the Board of Trustees of the Authority.)

Upon motion duly made, seconded and unanimously carried, the meeting was adjourned.

I, the undersigned, do hereby certify that I am an Assistant Secretary of the Board of Trustees of the Louisiana Public Facilities Authority (the "Authority"), a public trust duly organized and existing under and by virtue of the laws of the State of Louisiana, and as such Assistant Secretary I have access to all records of the Authority.

I do hereby further certify that at a meeting of the Board of Trustees of the Authority duly called, held and convened, according to law, on April 30, 2025 a quorum being present and voting thereon, the above and foregoing Resolution was unanimously adopted and that said Resolution is a full true and correct copy of the said Resolution as it appears on the records of the Authority; that the same has not been revoked or amended and is now in full force and effect.

IN WITNESS WHEREOF, I have hereunto set my hand and attached the seal of the Authority this 30th day of April, 2025.

LOUISIANA PUBLIC FACILITIES AUTHORITY

By: /s/ Patricia A. Dubroc
Assistant Secretary

[SEAL]

139957-490531-may 8-1t
$ 458.64

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477 • tips@tips-usa.com

April 22, 2025

Gilmer Mirror

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

PUBLISHER'S AFFIDAVIT

THE STATE OF TEXAS, COUNTY OF UPSHUR

On this 19th day of MAY, 2025, personally appeared before me, the undersigned, a Notary Public in and for said County and State, William R. Greene, Publisher/Editor of The Gilmer Mirror, a newspaper published at Gilmer, County of Upshur, State of Texas, who, being by me duly sworn on oath, states that:

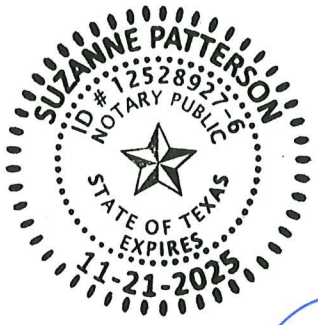
LEGAL NOTICE: TIPS BIDS

A true copy of which is hereto annexed, was published in said newspaper in its issues MAY 1 & 8, 2025

William R. Greene
Publisher/Editor

Subscribed and sworn to before me, this 19th day of MAY, 2025.

(Seal)



Suzanne Patterson
Notary Public, Upshur County, Texas



Planning a vacation? Need extra cash?

Sell your unwanted items with a classified ad!

Call **903-843-2503** To Place Your Ad

Apartments for Rent

PUBLIC NOTICE

The Gilmer Housing Authority is accepting applications for housing. The Gilmer PHA is made up of 1,2,3, and 4 bedroom apartments and has both elderly and non-elderly units.
The Gilmer PHA is for low and very low income applicants.
The Gilmer PHA does not discriminate on the basis of race, color, national origin, age, or handicap.
Eligible elderly, handicapped or families may apply at:
Gilmer Housing Authority
104 Circle Drive, P.O. Box 397
Gilmer, Texas 75644
Phone: 903-843-3141
Office hours are
Monday - Friday 8am-4pm
This institution is an equal opportunity provider and employer.

"All real estate advertised herein is subject to the Federal Fair Housing Act, which makes it illegal to advertise 'any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or intention to make any such preference, limitation, or discrimination.' "We will not knowingly accept any advertising for real estate which is in violation of the law. All persons are hereby informed that all dwellings advertised are available on an equal opportunity basis."

Garage Sales

Classic Farm Equipment & Garage Sale
May 9 • 8am-4pm
May 10 • 8am-2pm
2556 Ash Rd • Gilmer
Less than 1 mile from High School

Ford N Tractor with 4 implements, brush hog, disc, plow,& blade; 2 riding lawn mowers, recently serviced; small cow trailer; 2 air compressors; gas & electric chainsaws; gas blower; weedeater; Suzuki 50cc Moped; table saw & tools too numerous to mention; walnut gun case; lots of Coca-Cola; lots of old things from farm and house; fifth wheel hitch; half barrels from ads.
NO clothes and NO early lookers!

Garage Sales

MULTI FAMILY GARAGE Sale 1010 S Montgomery St Friday & Saturday 8am-? Moving! Everything must go!

ESTATE SALE- DORIS Tuel. Cash only. Lots of everything. May 2, 3 8am-5pm 2688 Bison Road, Gilmer, TX

MULTI FAMILY GARAGE Sale May 2 & 3, 8am 7096 FM 852, Gilmer. Tools, furniture, window units, baby items, tin, & miscellaneous.

Help Wanted

ELECTRICAL COMPANY SEEKING highly motivated and skilled Licensed Journeyman and Helpers. Call 903-725-5580 or email circles@etex.net

For classified ads and local news visit our website!

Building Repair

RAYMOND HARDIN ROOFING
Serving all of East Texas
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Lawn & Garden

ONE MAN & A MOWER
Spring Clean Ups, Mowing, Mulching, Blowing, Weed Eating, Edging
Mike Maness
903-261-8760

Public Notice

PUBLIC NOTICE

In accordance with House Bill 1545 (86th Legislative Session, 2019), notice is hereby given that an application for a local option liquor election has been filed by Gokarna KC on behalf of Big Sandy Business LLC. The petition seeks to gather signatures for the legal sale of malt beverages and wine for off-premise consumption only.
The individual or entity applying for the petition is Big Sandy Business LLC. The type of local option liquor election being pursued is for the legalization of the sale of malt beverages and wine for off-premise consumption only.
This notice serves to fulfill the requirement for proof of publication in a newspaper of general circulation, as mandated by law. The publication includes the name of the territory, which in this case will be Precinct 4, Upshur County TX 75755, where the petition will be circulated.
The application for the local option liquor election will be filed with Lory Harle, Upshur County Administrator Elections located at 115 Simpson Gilmer, TX 75644.
This notice is published once to meet the statutory requirement, and further updates on the progress of the petition will be provided as necessary.
For inquiries or further information, please contact Gokarna KC at Best Mart 10 or visit 1010 FM 1002 S Big Sandy, TX 75755.

Public Notice

CITATION BY PUBLICATION HEIRSHIP-UNKNOWN HEIRS THE STATE OF TEXAS COUNTY OF UPSHUR JOE W. NEWSOM JR., Applicant's Attorney

TO ALL UNKNOWN HEIRS IN THE ESTATE OF:

JOHNNY JOE SHANNON BOLAND, Deceased, 25-230-CCPR-00006 In the County Court of Upshur County, Texas

SAMANTHA MICHELLE LAWSON, Applicant, filed in the County Court of Upshur County, an **Application for Determination of Heirship and Application for Letters of Administration** on the **ESTATE OF JOHNNY JOE SHANNON BOLAND**, deceased, requesting that the Court determine who are the heirs and only heirs of **JOHNNY JOE SHANNON BOLAND**, deceased, and their respective shares and interests in such estate.

The court may act on this application at any call of the docket on or after 10:00 a.m., on the first Monday next after the expiration of 10 days from the date of publication of this citation, at the Upshur County Courthouse, 150 E. Jefferson Street, Gilmer, Texas 75644.

All persons interested in said estate are cited to appear before this Honorable Court by filing a written contest or answer to this Application should they desire to do so. **To ensure its consideration, you or your attorney must file any objection, intervention, or response in writing** with the County Clerk of Upshur County, Texas on or before the above noted date and time.

GIVEN UNDER MY HAND AND SEAL of said Court, at the office of the Upshur County Clerk in Gilmer, Texas on the 10th day of March, 2025.

TERRI ROSS, County Clerk Upshur County, Texas
150 E. Jefferson Street
Gilmer, Texas 75644
By K.P. Deputy

Public Notice

PUBLIC NOTICE

New Diana I.S.D. Maintenance department is taking quotes on a 20 w x 30 l x 10' H Vertical Metal Building and 20x30x 4" concrete slab. For details about the job contact Bruce Jeffery at 903 663-8000 ext. 8400. Quotes are due no later than Thursday, May 15, 2025 @ 2:00 p.m. 11140 State Hwy 154 East Diana, Texas 75640.

Advertise your business online!

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that letters testamentary for the estate of MILTON E. BAGLEY, Decedent, were issued on April 22, 2025 in Case No. 25-230-CCPR-00015 pending in the Upshur County Court, Upshur County, Texas to LINDA DAILEY, Independent Executor.

Claims may be presented to the representative's attorney

Kristen J. Ishihara,
3000 HG Mosley Pkwy,
Longview, TX 75605

All persons having claims against this estate, which is currently being administered, are required to present them within the time and in the manner prescribed by law.

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the Estate of BOBBY REX GAGE, Deceased, was issued on the 21st day of April, 2025 in Docket Number 25-230-CCPR-00017 in the County Court of Upshur County, Texas, to SHIRLEY M. GAGE.

The residence of the Independent Executor is in Upshur County, Texas and the mailing address is:

Estate of Bobby Rex Gage
c/o Shirley M. Gage
5311 Aspen Trail
Gilmer, Texas 75644

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

DATED the 23rd day of April, 2025.

Dwight A. Brannon
State Bar #02894500
P.O. Box 670
Gilmer, Texas 75644
(903) 843-2523
Attorney for the Estate of Bobby Rex Gage, Deceased

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the Estate of BERNARD WAYNE HAYNES, JR., Deceased, was issued on the 21st day of April, 2025 in Docket Number 25-230-CCPR-00012 in the County Court of Upshur County, Texas, to LESLIE C. SPEARS and BETTY F. INGLISH.

The residence of one of the Co-Independent Executors is in Upshur County, Texas and the mailing address is:

Estate of Bernard Wayne Haynes, Jr.
c/o Leslie C. Spears and Betty F. Inglish
9025 Bob-O-Link Road
Gladewater, Texas 75647

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

DATED the 23rd day of April, 2025.

Dwight A. Brannon
State Bar #02894500
P.O. Box 670
Gilmer, Texas 75644
(903) 843-2523
Attorney for the Estate of Bernard Wayne Haynes, Jr., Deceased

Public Notice

PUBLIC NOTICE TO ALL PERSONS BUYING PROPERTY IN THE VICINITY OF THE SHARON WATER SUPPLY CORP.

Sharon Water Supply Corp. urges any prospective buyers to verify with the Manager at the office located at 6175 N. State Hwy. 37, Winnsboro, Texas, whether or not water is available at the tract of land in question. Sharon Water Supply Corporation 6175 N. State Hwy. 37 Winnsboro, Texas 75494. 903-342-3525

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the Estate of JODY CLINT ROBERTS, Deceased, was issued on the 21st day of April, 2025 in Docket Number 25-230-CCPR-00018 in the County Court of Upshur County, Texas, to SHERRY L. ROBERTS.
The residence of the Independent Executor is in Upshur County, Texas and the mailing address is:

Estate of Jody Clint Roberts
c/o Sherry L. Roberts
310 Crepe Myrtle Road
Big Sandy, Texas 75755

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

DATED the 23rd day of April, 2025.

Dwight A. Brannon
State Bar #02894500
P.O. Box 670
Gilmer, Texas 75644
(903) 843-2523
Attorney for the Estate of Jody Clint Roberts, Deceased

Public Notice

NOTICE TO CREDITORS

Notice is hereby given that original Letters Testamentary for the Estate of EILEEN M. STEVENS, Deceased, were issued on April 21, 2025, in Cause No. 25PR00329, pending in the County Court of Upshur County, Texas, to: KIMBERLY STEVENS THOMAS

All persons having claims against this Estate which is currently being administered are required to present them to Kimberly Stevens Thomas, c/o Kyle G. Waggoner, Attorney at Law, at PO Box 1152, Mineola, Texas, 75773.

Public Notice

NOTICE TO ALL PERSONS BUYING PROPERTY IN THE VICINITY OF THE PRITCHETT WATER SUPPLY CORP.

Pritchett Water Supply Corp. understands that property is sometimes sold with the representation that water is available to the property from the PWSC System. Such is not always the case, and the PWSC urges any prospective buyer to verify with the operator by calling 903-734-5438 (Mon.-Fri., 8-4) or writing PWSC, 3670 State Highway 155 South, Gilmer, Texas 75645 that water is in fact available at the particular tract in question.

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the estate of RETA BELLE JOHNSON ROSS, Decedent, were issued on April 22, 2025 in Case No. 25-230-CCPR-00014 pending in the Upshur County Court, Upshur County, Texas to TAFT HUGH THOMAS, Independent Administrator.

Claims may be presented to the representative's attorney

Kristen J. Ishihara,
3000 HG Mosley Pkwy,
Longview, TX 75605

All persons having claims against this estate, which is currently being administered, are required to present them within the time and in the manner prescribed by law.

Public Notice

PUBLIC NOTICE

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.



Please watch for notice of our Holiday deadlines in The Gilmer Mirror Call 903-843-2503 for more info!

TEXAS STATEWIDE CLASSIFIED ADVERTISING NETWORK

TexSCAN

TexSCAN Week of April 27-May 3, 2025

ACREAGE

Waterfront Land Sale — June 7th only, off of Matagorda Bay. Texas' Newest Waterfront Community featuring 1-3 acre properties starting at $49,900. By appointment on June 7th: 830-310-6195.

AUCTION

Land Auction May 22 — 410 ± acres commercial, home site acreages, and recreational land offered in 13 parcels located 8 minutes northeast of Mount Pleasant along Interstate 30. 918-550-8118, CJ-Auctions.com.

Coyote Hills Ranch Production Sale — Sat., May 3, 1 p.m., Chattanooga, OK. Selling 75 lots of pairs with 15 bulls. Bid live online at www.LiveAuctions.tv. For more information, call 580-704-6739 or view catalog online at www.coyotehillsok.com.

CHARITY

Donate your car, truck, boat, RV and more to support our veterans! Schedule a FAST, FREE vehicle pickup and receive a top tax deduction! Call Veteran Car Donations at 1-855-808-4152 today!

EMPLOYMENT

Lake City Area Medical Center is hiring a Mid-Level Provider. Benefit package, retirement, PTO, conference/CE allowance, HSA. $95,000-$110,000/yr. EOE Send CVs to lcmedcenter@lcamc.net or request job descriptions.

ENERGY

Prepare for power outages today with a Generac Home Standby Generator. Act now to receive a FREE 5-Year warranty with qualifying purchase. Call 1-855-704-8579 today to schedule a free quote. It's not just a generator. It's a power move.

HOME IMPROVEMENT

SunSetter. America's Number One Awning! Instant shade at the touch of a button. Transform your deck or patio into an outdoor oasis. Up to 10-year limited warranty. Call now and SAVE $350 today! 844-997-3014

MEDICAL

Portable Oxygen Concentrator May Be Covered by Medicare! Reclaim independence and mobility with the compact design and long-lasting battery of Inogen One. Free information kit! Call 866-747-9983.

OIL & GAS RIGHTS

We buy oil, gas & mineral rights. Both non-producing and producing including Non-Participating Royalty Interest (NPRI). Provide us your desired price for an offer evaluation. Call today: 806-620-1422. Lobo Minerals, LLC, PO Box 1800, Lubbock, TX 79408-1800, LoboMineralsLLC@gmail.com.

WATER DAMAGE

WATER DAMAGE CLEANUP & RESTORATION: A small amount of water can lead to major damage in your home. Our trusted professionals do complete repairs to protect your family and your home's value! Call 24/7: 1-833-879-1450. Have zip code of service location ready when you call!

WANTED

Need Extra Cash — I Buy RVs & Mobile Homes –Travel Trailers, 5th Wheels, Gooseneck, Bumper Pulls. In Any Area, Any Condition – Old/New, Dirty or Clean! I PAY CASH. No Title – No Problem, we can apply for one. We go anywhere in Texas. ANR Enterprises, 956-466-7001!

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The Gilmer Mirror
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Apartments for Rent

PUBLIC NOTICE

The Gilmer Housing Authority is accepting applications for housing. The Gilmer PHA is made up of 1,2,3, and 4 bedroom apartments and has both elderly and non-elderly units.
The Gilmer PHA is for low and very low income applicants.
The Gilmer PHA does not discriminate on the basis of race, color, national origin, age, or handicap.
Eligible elderly, handicapped or families may apply at:
Gilmer Housing Authority
104 Circle Drive, P.O. Box 397
Gilmer, Texas 75644
Phone: 903-843-3141
Office hours are
Monday - Friday 8am-4pm
This institution is an equal opportunity provider and employer.

"All real estate advertised herein is subject to the Federal Fair Housing Act, which makes it illegal to advertise 'any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or intention to make any such preference, limitation, or discrimination.' "We will not knowingly accept any advertising for real estate which is in violation of the law. All persons are hereby informed that all dwellings advertised are available on an equal opportunity basis."

Garage Sales

Classic Farm Equipment & Garage Sale
May 9 • 8am-4pm
May 10 • 8am-2pm
2556 Ash Rd • Gilmer
Less than 1 mile from High School

Ford N Tractor with 4 implements, brush hog, disc, plow,& blade; 2 riding lawn mowers, recently serviced; small cow trailer; 2 air compressors; gas & electric chainsaws; gas blower; weedeater; Suzuki 50cc Moped; table saw & tools too numerous to mention; walnut gun case; lots of Coca-Cola; lots of old things from farm and house; fifth wheel hitch; half barrels from ads.
NO clothes and NO early lookers!

Help Wanted

ELECTRICAL COMPANY SEEKING highly motivated and skilled Licensed Journeyman and Helpers. Call 903-725-5580 or email circles@etex.net

Notices

C&M STORAGE - Sheila Mott for lack of payment. Many of attempts have been made to contact you. Contents will be disposed of after Friday, May 23rd.

Boats & Motors

WANTED: 12'-16' SAILBOAT. Used in good condition. Must have sails, trailer, centerboard. Call or text Terry at 903-363-2177. Leave Message.

For Sale

METAL BARRELS FOR Sale. Drum, 2/$15.00, Open top $10.00, Fuel $10.00, Storage lid & seal 2/$25.00. 3.5 miles S. 155 on right and 1414 N. Cypress St, Gilmer.

Public Notice

SECTION 106 PUBLIC NOTICE

American Towers LLC is proposing to modify an existing telecommunications tower facility at 212 Boulder Avenue, Big Sandy, Upshur County, TX 75755, Parcel ID: Vol. 54 Page 54. American Towers LLC seeks comments from all interested persons on any potential significant impact the proposed action could have on the quality of the human environment pursuant to 47 C.F.R. Section 1.1307, including potential impacts to historic or cultural resources that are listed or eligible for listing in the National Register of Historic Places. Interested persons may comment or raise concerns about the proposed action by submitting an e-mail to enviro.services@americantower.com. Paper comments can be sent to: American Towers LLC, Attn: Environmental Compliance, 10 Presidential Way, Woburn, MA 01801. Requests or comments should be limited to environmental and historic/cultural resource impact concerns and must be received within 30 days from the date of this publication. This invitation to comment is separate from any local planning/zoning process that may apply to this project. Re: 22504127"

Public Notice

PUBLIC NOTICE

New Diana I.S.D. Maintenance department is taking quotes on a 20 w x 30 l x 10' H Vertical Metal Building and 20x30x 4" concrete slab. For details about the job contact Bruce Jeffery at 903 663-8000 ext. 8400. Quotes are due no later than Thursday, May 15, 2025 @ 2:00 p.m. 11140 State Hwy 154 East Diana, Texas 75640.

Public Notice

NOTICE OF SPECIAL SETTING- BUDGET WORKSHOP

The Upshur County Commissioners Court will hold a special setting Budget Workshop for the purpose of discussing the FY 2026 budget at 9:00 a.m. on May 29, 2025 to be held in the County Courtroom Upshur County Courthouse, 150 East Jefferson, Gilmer, Texas. If necessary, the Budget Workshop may extend to May 30, 2025.

The Court will have general budget discussions followed by departmental budget request presentations related to the FY 2026 Upshur County Budget.

The public is invited to attend.

Public Notice

NOTICE TO CREDITORS

Notice is hereby given that original Letters Testamentary for the Estate of ROLAND BRENT LAMBERT, Deceased, were issued on the May 5, 2025, in Cause No 25-230-CCPR-00009, pending in the County Court of Upshur County, Texas, to: JAMES BRENT LAMBERT.

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

c/o: **JOHN L. YOUNGBLOOD**
Attorney at Law
206-B Crestway Street
Athens, Texas 75751

DATED the 5th day of May, 2025.

JOHN L. YOUNGBLOOD
Attorney for JAMES BRENT LAMBERT
State Bar No.: 24003222
206-B Crestway Street
Athens, Texas 75751
Telephone: (903) 675-5188
Facsimile: (903) 675-3057
Email: john@johnlyoungbloodlaw.com

Public Notice

PUBLIC NOTICE

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

Meet your Needs With The Gilmer Mirror Classifieds!
903-843-2503

TEXAS STATEWIDE CLASSIFIED ADVERTISING NETWORK
TexSCAN
TexSCAN Week of May 4-10, 2025

ACREAGE
Waterfront Land Sale — June 7th only, off of Matagorda Bay. Texas' Newest Waterfront Community featuring 1-3 acre properties starting at $49,900. By appointment on June 7th: 830-310-6195.

ADOPTION
Loving, home-study approved couple in San Diego ready to offer a joyful, secure life to a newborn. Expenses paid. Call/text Eddy 619-356-1976.

AUCTION
Land Auction May 22 — 410 ± acres commercial, home site acreages, and recreational land offered in 13 parcels located 8 minutes northeast of Mount Pleasant along Interstate 30. 918-550-8118, CI-Auctions.com.

CHARITY
Donate your car, truck, boat, RV and more to support our veterans! Schedule a FAST, FREE vehicle pickup and receive a top tax deduction! Call Veteran Car Donations at 1-855-808-4152 today!

EMPLOYMENT
Lake City Area Medical Center is hiring a Mid-Level Provider. Benefit package, retirement, PTO, conference/CE allowance, HSA. $95,000-$110,000/yr. EOE Send CVs to lcmedcenter@lcamc.net or request job descriptions.

ENERGY
Prepare for power outages today with a Generac Home Standby Generator. Act now to receive a FREE 5-Year warranty with qualifying purchase. Call 1-855-704-8579 today to schedule a free quote. It's not just a generator. It's a power move.

HOME IMPROVEMENT
SunSetter. America's Number One Awning! Instant shade at the touch of a button. Transform your deck or patio into an outdoor oasis. Up to 10-year limited warranty. Call now and SAVE $350 today! 844-997-3014

MEDICAL
Portable Oxygen Concentrator May Be Covered by Medicare! Reclaim independence and mobility with the compact design and long-lasting battery of Inogen One. Free information kit! Call 866-747-9983.

OIL & GAS RIGHTS
We buy oil, gas & mineral rights. Both non-producing and producing including Non-Participating Royalty Interest (NPRI). Provide us your desired price for an offer evaluation. Call today: 806-620-1422. Lobo Minerals, LLC, PO Box 1800, Lubbock, TX 79408-1800, LoboMineralsLLC@gmail.com.

WATER DAMAGE
WATER DAMAGE CLEANUP & RESTORATION: A small amount of water can lead to major damage in your home. Our trusted professionals do complete repairs to protect your family and your home's value! Call 24/7: 1-833-879-1450. Have zip code of service location ready when you call!

WANTED
Need Extra Cash — I Buy RVs & Mobile Homes –Travel Trailers, 5th Wheels, Gooseneck, Bumper Pulls. In Any Area, Any Condition – Old/New, Dirty or Clean! I PAY CASH. No Title – No Problem, we can apply for one. We go anywhere in Texas. ANR Enterprises, 956-466-7001!

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Gab's Tree Trimming & Clearing Service
Free Estimates
Gabriel Escalante
903-762-2727
903-790-1093 or 903-790-7040

Lawn & Garden

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Gilmer Mirror Classified Ad Form

I would like my ad to be classified under _____ heading for _____ issues.

Name: _____
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Deadline Tuesday at 10am

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For more information or to place your ad by phone, call The Gilmer Mirror office at 903-843-2503.

To pay for your ad with credit card, please include the following information.
Credit card type: _____
Credit card number: _____
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MasterCard DISCOVER VISA

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477• tips@tips-usa.com

April 22, 2025 KC

STAR
McClatchy Company LLC

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.

Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com
brooke.scott@tips-usa.com
903-575-2608

McClatchy

The Beaufort Gazette
The Belleville News-Democrat
Bellingham Herald
Centre Daily Times
Sun Herald
Idaho Statesman
Bradenton Herald
The Charlotte Observer
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Durham | The Herald-Sun
Fort Worth Star-Telegram
The Fresno Bee
The Island Packet
The Kansas City Star
Lexington Herald-Leader
The Telegraph - Macon
Merced Sun-Star
Miami Herald
El Nuevo Herald

The Modesto Bee
The Sun News - Myrtle Beach
Raleigh News & Observer
Rock Hill | The Herald
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San Luis Obispo Tribune
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Tri-City Herald
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AFFIDAVIT OF PUBLICATION

Account #	Order Number	Identification	Order PO	Cols	Depth
115728	656546	Print Legal Ad-IPL02293020 - IPL0229302		1	25 L

Attention: Shelley Black

TIPS Purchasing Cooperative/Region 8 ESC
4845 US HWY 271 N
Pittsburg, Texas 75686

brooke.scott@tips-usa.com

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.
IPL0229302
May 1,8 2025

THE STATE OF TEXAS
COUNTY OF TARRANT

Mary Castro,

make oath and swear that

CYPRESS MEDIA, LLC, publishers of The Kansas City Star is published in the Kansas City, Missouri, metro (distribution) area including but not exclusively to Johnson and Wyandotte Counties in the state of Kansas, and Cass, Clay, Jackson and Platte Counties in the state of Missouri. We confirm the notice ran the days scheduled in this statement. A true copy of which is hereto attached was duly published in The Kansas City Star.

2 insertion(s) published on:
05/01/25, 05/08/25

Mary Castro

Sworn to and subscribed before me this 8th day of May in the year of 2025

Amy Robbins

Notary Public in and for the state of South Carolina, residing in Beaufort County

AMY L. ROBBINS
NOTARY PUBLIC
SOUTH CAROLINA
MY COMMISSION EXPIRES 11-03-32

Extra charge for lost or duplicate affidavits.
Legal document please do not destroy!



LAURENT LAIRYS Abaca Press via Sipa USA

Top-seeded Aryna Sabalenka won 28 of her 36 first-serve points to beat Peyton Stearns 6-2, 6-4 in the Mutua Madrid Open on Tuesday.

Sabalenka, Swiatek, Keys reach Madrid QFs

Field Level Media

No. 1 seed Aryna Sabalenka of Belarus sailed past American foe Peyton Stearns 6-2, 6-4 on Tuesday to reach the quarterfinals of the Mutua Madrid Open.

Sabalenka headlines an intriguing final eight at the WTA 1000 event, which will also feature a duel between No. 2 seed Iga Swiatek of Poland and No. 5 Madison Keys of the U.S. after they took care of business Tuesday.

Sabalenka saved 12 of 13 break points, including 10-for-10 in the first set, while winning 28 of her 36 first-serve points (77.8 percent).

It marked the World No. 1's 28th match victory this year, which leads the WTA Tour by one over Jessica Pegula.

As she searches for her second WTA 1000 title of 2025 following last month's triumph in Miami, Sabalenka will face Ukrainian No. 24 seed Marta Kostyuk in the quarterfinals. Kostyuk was a 6-3, 6-2 winner over Russia's Anastasia Potapova in the Round of 16.

Swiatek fended off a push from Russian 13th seed Diana Shnaider and won 6-0, 6-7 (3), 6-4 on Tuesday.

Swiatek felt she moved better and put greater spin on her shots during the third set, when she won all five of her service games and 14 of 19 first-service points.

"In second set it got pretty windy, and I didn't move my legs properly," Swiatek said after the match. "I played some shots like not being ready, you know, so for sure that kind of kept my rhythm off. And then Diana also used her chances, and she was more proactive than in the first set. So I think it was a mix of different things."

Australian Open champion Keys eased past No. 19 seed Donna Vekic of Croatia 6-2, 6-3. Keys saved 2 of 3 break points while converting 5 of 8 break-point opportunities against Vekic.

Keys faces a tall task in the quarterfinals against her Polish counterpart. Swiatek is 4-2 against Keys all-time.

"I think obviously you look at matches that you won and you figure out why you won them, and you look at matches why you lost, and you try to figure out what you did wrong or what she did really well that day and then you try to come up with a game plan," Keys said of facing Swiatek.

"I think obviously it's a little bit different when you're on a surface that she loves (clay) and she does really well on and all of that. I think you have to take that into account and just kind of go one step further with that and just try to figure out how do you kind of elevate your game a little bit more because I think you have to."

Also Tuesday, No. 17 seed Elina Svitolina of Ukraine beat Greece's Maria Sakkari 6-3, 6-4, and Japan's Moyuka Uchijima overcame No. 21 seed Ekaterina Alexandrova of Russia 6-4, 7-6 (5).

The quarterfinals will also see No. 4 seed Coco Gauff take on No. 7 seed Mirra Andreeva of Russia. Gauff and Andreeva won their Round of 16 matches Monday before a nationwide power outage occurred in Spain, postponing the tournament.



SVEN HOPPE dpa via Sipa USA

For the second consecutive year, Francisco Cerundolo, seen here on April 18, defeated Alexander Zverev to advance to the quarterfinals of the Madrid Open. On Tuesday, Cerundolo won 50 of his 70 total service points to dispatch the top-seeded Zverev 7-5, 6-3.

Cerundolo downs top seed Zverev in Madrid Open

Field Level Media

No. 20 seed Francisco Cerundolo of Argentina dismissed top seed Alexander Zverev of Germany 7-5, 6-3 on Tuesday to advance to the quarterfinals of the Madrid Open.

Cerundolo defeated Zverev in the Round of 16 at this ATP Masters 1000 event for the second year in a row. He is 3-0 against Zverev all-time, including a quarterfinal victory over him in Buenos Aires earlier this season.

"I'm super happy because I know he loves playing here. He told me last year when I beat him," Cerundolo said post-match. "He's an incredible player. I have a great relationship with him, so super happy to get another win and to be in the quarterfinals again."

Cerundolo won 50 of his 70 total service points (71.4 percent) and went 7-for-7 on points at the net. Zverev managed only six winners with 23 unforced errors.

After he ended Zverev's seven-match winning streak, Cerundolo's next task will be to face Czech No. 22 seed Jakub Mensik, who is on a nine-match winning streak dating to his ATP 1000 title in Miami last month.

Mensik breezed past Kazakhstan's Alexander Bublik 6-3, 6-2 in just 56 minutes in their Round of 16 match. Bublik was caught on camera facetiously asking the chair umpire, "Remember when tennis was easy? ... Now this guy (Mensik) is not even Top 5, not even Top 10. (Expletive) is that?"

In the same region of the draw, No. 14 seed Casper Ruud of Norway knocked out No. 3 seed Taylor Fritz of the United States 7-5, 6-4, in the late match of the day. Ruud had a 27-19 edge in total winners and also won 9 of 10 points at the net.

Ruud will face No. 9 seed Daniil Medvedev of Russia in the quarterfinals after Medvedev rallied past American No. 31 Brandon Nakashima 3-6, 6-1, 6-4.

The rest of the matches Tuesday were Round of 32 affairs, as the tournament plays catch-up after a nationwide power outage Monday interrupted the event.

British No. 5 seed Jack Draper advanced when his opponent, No. 30 seed Matteo Berrettini of Italy, retired after Draper took the first set 7-6 (2).

Australian sixth seed Alex de Minaur defeated Canadian No. 29 Denis Shapovalov 6-3, 7-6 (3), while No. 10 Lorenzo Musetti of Italy topped No. 17 Stefanos Tsitsipas of Greece 7-5, 7-6 (3).

Two more Americans advanced to the Round of 16 when No. 11 seed Tommy Paul outlasted No. 24 Karen Khachanov of Russia 6-3, 3-6, 6-2, and No. 16 seed Frances Tiafoe swept Frenchman Alexandre Muller 6-3, 6-3.

Canadian lucky loser Gabriel Diallo remained alive when he charged past Great Britain's Cameron Norrie 2-6, 6-4, 6-4.

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Legals

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6201 E 109TH ST KANSAS CITY,MO 64134
CHARLES EUGENE BANISTER TR dba CHARLES E.BANISTER 6201 E 109TH ST KANSAS CITY MO,64134

BCCI Construction Group

Invitation to Bid

BCCM Construction Group, Inc. and K&J Builders, LLC, will be accepting bids on the 929 Walnut Apartments Building in Kansas City, MO 64106 on May 9,2025, by 3 p.m. The project is a new 8-story, 45-unit aparatment building. MBE and WBE participation is required, at 15% each.

The prebid walk-through is scheduled for May 1, 2025, at 10:00 a.m.

Any bidding documents and or requests should be sent to estimating@bccmconstruction.com or call 816-659-9115

NOTICE OF ACCEPTANCE OF BIDS
Notice is hereby given that the Liberty Public School District No. 53 will receive bid proposals for the following:

ROOF IMPROVEMENTS – STADIUM PRESS BOXES

The District reserves the right to reject any or all bids and waive any informality. Copies of bid documents may be secured by emailing Jason Breit, Director of Purchasing at jason.breit@lps53.org.
Sealed bids must be submitted by 1:00 PM CST, Tuesday, May 13, 2025 at which time all bid proposals received will be publicly opened.
Bids should be delivered to:
Liberty Public Schools
Support Services Center
801 Kent St
Liberty, MO 64068
Attn: Jason Breit
Director of Purchasing
816-736-5358
IPL0230564
May 1,8 2025

INVITATION TO BID
Notice to Contractors

Sealed bids will be received by Kansas City Parks and Recreation Dept. at 4600 E. 63rd Street, Kansas City, MO 64130 until 2:00pm on **May 28, 2025**, when publicly opened and read. All Bids must comply with the Bidding Requirements of Kansas City, MO. Bids shall be submitted as sealed bids, be addressed to Director of Parks and Recreation, state on outside of envelope "Bid Enclosed", have Project title and number, and be deposited in the locked Bid box.

The proposed work includes:
Replacement of existing asphalt trail segments with new concrete trail, for segments of the Indian Creek Trail located between State Line Road and Locust St.

Plans and specifications are available at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org.
IPL0230742
May 1-2,4-9,11-16,18-23,25-28 2025

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:
250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.
IPL0229302
May 1,8 2025

NOTICE OF PUBLIC SALE:
Pursuant to MO Self-Service Storage Facilities Act & to satisfy Owner's lien Brighton StorTropolis will hold an online public auction of the personal property stored in units located at 8340 N Brighton Ave KCMO 64119 to satisfy Operator's lien. Everything sold is purchased AS-IS for CASH ONLY. See & bid on all units 24/7, sale ending on 05/15/2025 12:00 PM @ www.lockerfox.com. Auctions subject to cancellation at any time for any reason until winning bidder takes possession of property. TERMS listed on auction website.
IPL0226975
May 1 2025

NOTICE OF BID
Bids for High Voltage Electrical Services – Missouri State Fairgrounds / Statewide, Project No. IDIQMCA-5003, will be received by FMDC, State of MO, **UNTIL 1:30 PM, May 15, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0229110
Apr 28-May 2,4-8 2025

Advertisement for Bid
Bids for New Premium Campsites at Watkins Woolen Mill State Park and State Historic Site, Project No. X2220-01, will be received by FMDC, State of MO, **UNTIL 1:30 PM, May 22, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0228535
Apr 21-25,27-May 1 2025

INVITATION TO BID
Park Improvements
Project No. 70250037
Project Title: Swope Park Improvements ORLP Grant
Notice to Design Professionals
Design proposals for **Swope Park Improvements ORLP Grant – Project No. 70191308**, will be received at ***The Parks and Recreation Department*** of Kansas City, Missouri, 4600 E. 63rd Street Trafficway, Kansas City, Missouri 64130 until 4:00 O'Clock P.M. (Prevailing Local Time) on the 28th day of May, 2025.
The proposed work includes:
Project scope will include design services for park improvements in the northwest area of Swope Park including trails, playground, shelter and bandstand repairs, and multi-modal improvements.
This is a public improvement project for which the construction will be funded in part with Federal funds.
The Request for Qualifications/Proposals will be available online to all interested parties at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org. All addenda will be posted at this location. Any document or plan may be viewed or downloaded from this location.
The Parks and Recreation Department will hold a virtual Microsoft Teams pre-proposal conference at 2:00 PM on the 14th day of May, 2025. Meeting information is below:
Microsoft Teams Meeting
Meeting ID: 280 449 797 651
Passcode: 8FB7vb7z
Dial in by phone
+1 872-212-5076,,915254606#
Phone conference ID: 915 254 606#
Proposers are encouraged but not required to attend the pre-bid meeting.
Lisa Treese,
Project Manager
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7619 Phone
Email: lisa.treese@kcmo.org
Hillary Chaisson,
Contract Administrator
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7560 Phone
Email: hillary.chaisson@kcmo.org
The City of Kansas City, Missouri (OWNER) hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, businesses owned and controlled by socially and economically disadvantaged individuals will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, religion, creed, sex, age, ancestry or national origin in consideration for an award. Federal Land and Water Conservation Funds are being used in this project, and all relevant federal, state, and local requirements apply.
IPL0230814
May 1,8,15 2025

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Community Yard Sale
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Golden Retriever AKC F/M Vet Shots Champion Bloodines 660-287-6359

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Puppies for sale! 816-383-0489
Midwestdoodleranch.com $1500+

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Clif's Outdoors * 913-300-1657
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Tim 913-620-1092

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KC Star file photo

Then playing for Kansas, Lagerald Vick whips a pass around K-State's Xavier Sneed and Dean Wade during a 2019 Big 12 game men's basketball game at Bramlage Coliseum in Manhattan.

Two former Kansas Jayhawks sign up for KU's alumni entry in summertime TBT

BY GARY BEDORE
gbedore@kcstar.com

Former University of Kansas men's basketball guards Nick Timberlake and Lagerald Vick on Tuesday became the first two players to commit to playing for JHX Hoops, KU's alumni entry in The Basketball Tournament (TBT 2025).

JHX Hoops will co-host the TBT's Kansas City Regional with Kansas State's alumni team, Purple Reign. The regional will be held July 19-23 at Kansas City's Municipal Auditorium.

Additional roster announcements will be made in coming weeks.

This will be the third straight summer Vick plays for KU's alumni team, formerly known as Mass Street.

Vick has averaged 10.7 points and 3.3 rebounds per game in TBT in the last two years, helping lead the Kansas alumni to back to back regional final appearances.

Vick spent four years at Kansas (2015-19). He began his professional career in Taiwan in 2019 and has since played professionally across South America and New Zealand.

Timberlake will be making his TBT debut for JHX Hoops. He competed at KU in 2023-24. He spent spent his first professional season playing in Portugal and England.

The winner of the Kansas City Regional will advance to TBT's quarterfinals on July 28. The semifinals will be held on July 31, and TBT's $1 million championship will be played on Aug. 3.

For the first time, TBT will give each host team the opportunity to have home court advantage for the quarterfinals, semifinals and the $1 million championship game. Should two regional hosts face off, the tiebreaker will be determined by which host sells 4,000 tickets first.

For more information on this year's TBT or JHX Hoops, visit tbthoops.com.

Gary Bedore: 816-234-4068, @garybedore

No KU Jayhawks or KSU Wildcats are invited to NBA pre-draft events this year

BY GARY BEDORE
gbedore@kcstar.com

Kansas Jayhawks seniors Hunter Dickinson, Dajuan Harris, Zeke Mayo and Shakeel Moore will not be attending the 2025 NBA G League Elite camp Friday through Sunday at Wintrust Arena in Chicago.

Their names, as well as the names of Kansas State men's hoops players Coleman Hawkins and David N'Guessan, were not among the 45 pro prospects asked to participate in strength and agility drills and 5-on-5 games. Those 45 will also have their measurements taken in front of scouts, front office executives and coaches at the weekend event.

Seventy-five pro prospects were asked to attend the 2025 NBA Draft Combine, which runs Sunday through May 18 in the Windy City.

Incoming KU senior wing Melvin Council Jr., a transfer from St. Bonaventure who has entered his name in the 2025 NBA Draft, was not invited to either pre-draft event. He has until May 28 to remove his name from the draft if he wishes to play a final season of college basketball at KU.

Missouri's Tamar Bates and Caleb Grill received invitations to the G League camp Monday with Big 12 players Keshon Gilbert and Curtis Jones of Iowa State; Caleb Love of Arizona; Chance McMillan of Texas Tech; and Joson Sanon of Arizona State.

If the two Tigers fare well at G League camp, they could be extended invitations to stay in Chicago for the Combine.

Player agents are free to set up workouts with individual NBA teams in advance of the NBA Draft, slated for June 25-26 in Brooklyn.

Texas Tech's Darrion Williams and St. John's R.J. Luis, who are in both the draft pool and transfer portal, have been invited to attend the NBA Draft Combine Sunday through May 18 in Chicago. Both are considering KU as transfer destinations.

Big 12 players who have been invited to the 2025 NBA Combine include: Carter Bryant, Arizona; Egor Demin, BYU; VJ Edgecombe, Baylor; Javon Small, West Virginia and Milos Uzan, Houston.

There is still a slight chance KU's Mayo, a 6-4 senior from Lawrence, could return for a fifth college season. He has entered his name in the NCAA transfer portal with a no-contact tag in case the NCAA approves a proposed rule granting fourth-year players a fifth season.

Gary Bedore: 816-234-4068, @garybedore



DOMINICK WILLIAMS dowilliams@kcstar.com

Kansas Jayhawks guard Zeke Mayo celebrates after hitting a 3-pointer in the second half of the Big 12 Championship quarterfinal game vs. the Arizona Wildcats on Thursday, March 13, 2025 at T-Mobile Center.

THE KANSAS CITY STAR.
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Legals

BCCM Construction Group

Invitation to Bid

BCCM Construction Group, Inc. and K&J Builders, LLC, will be accepting bids on the 929 Walnut Apartments Building in Kansas City, MO 64106 on May 9,2025, by 3 p.m.

The project is a new 8-story, 45-unit aparatment building. MBE and WBE participation is required, at 15% each.

The prebid walk-through is scheduled for May 1, 2025, at 10:00 a.m.

Any bidding documents and or requests should be sent to estimating@bccmconstruction.com or call 816-659-9115

NOTICE OF BID
Bids for High Voltage Electrical Services – Missouri State Fairgrounds / Statewide, Project No. IDIQMCA-5003, will be received by FMDC, State of MO, **UNTIL 1:30 PM, May 15, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0229110
Apr 28-May 2,4-8 2025

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:
250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.
IPL0229302
May 1,8 2025

ADVERTISEMENT FOR BID
Bids for Renovate Interior & Exterior at Trenton Readiness Center, Project No. T2405-01, will be received by FMDC, State of MO, **UNTIL 1:30 PM, June 12, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0229609
May 5-9,11-15 2025

NOTICE OF ACCEPTANCE OF BIDS
Notice is hereby given that the Liberty Public School District No. 53 will receive bid proposals for the following:

ROOF IMPROVEMENTS – STADIUM PRESS BOXES

The District reserves the right to reject any or all bids and waive any informality. Copies of bid documents may be secured by emailing Jason Breit, Director of Purchasing at jason.breit@lps53.org.

Sealed bids must be submitted by 1:00 PM CST, Tuesday, May 13, 2025 at which time all bid proposals received will be publicly opened.

Bids should be delivered to:
Liberty Public Schools
Support Services Center
801 Kent St
Liberty, MO 64068
Attn: Jason Breit
Director of Purchasing
816-736-5358
IPL0230564
May 1,8 2025

INVITATION TO BID
Park Improvements
Project No. 70250037
Project Title: Swope Park Improvements ORLP Grant
Notice to Design Professionals
Design proposals for **Swope Park Improvements ORLP Grant – Project No. 70191308**, will be received at ***The Parks and Recreation Department*** of Kansas City, Missouri, 4600 E. 63rd Street Trafficway, Kansas City, Missouri 64130 until 4:00 O'Clock P.M. (Prevailing Local Time) on the 28th day of May, 2025.
The proposed work includes:
Project scope will include design services for park improvements in the northwest area of Swope Park including trails, playground, shelter and bandstand repairs, and multi-modal improvements.
This is a public improvement project for which the construction will be funded in part with Federal funds.
The Request for Qualifications/Proposals will be available online to all interested parties at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org. All addenda will be posted at this location. Any document or plan may be viewed or downloaded from this location.
The Parks and Recreation Department will hold a virtual Microsoft Teams pre-proposal conference at 2:00 PM on the 14th day of May, 2025. Meeting information is below:
Microsoft Teams Meeting
Meeting ID: 280 449 797 651
Passcode: 8FB7vb7z
Dial in by phone
+1 872-212-5076,,915254606#
Phone conference ID: 915 254 606#
Proposers are encouraged but not required to attend the pre-bid meeting.
Lisa Treese,
Project Manager
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7619 Phone
Email: lisa.treese@kcmo.org
Hillary Chaisson,
Contract Administrator
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7560 Phone
Email: hillary.chaisson@kcmo.org
The City of Kansas City, Missouri (OWNER) hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, businesses owned and controlled by socially and economically disadvantaged individuals will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, religion, creed, sex, age, ancestry or national origin in consideration for an award. Federal Land and Water Conservation Funds are being used in this project, and all relevant federal, state, and local requirements apply.
IPL0230814
May 1,8,15 2025

NOTICE OF PROPOSED PURCHASE AND ASSUMPTION TRANSACTION
Notice is hereby given that application has been made to the Comptroller of the Currency, Western District Office, Independence Plazs 1050 17th Street, Suite 1500, Denver, Colorado 80265-1050, for consent to the purchase and assumption by UMB Bank, n.a., 1010 Grand Boulevard, Kansas City, Missouri 64106, of certain Health Savings Accounts for which Old National Bank, One Main Street, Evansville, Indiana 47708, has assumed the role of custodian following the closure of the merger transaction between Old National Bank and Bremer Bank, National Association. It is contemplated that the main office and branch offices of each of UMB Bank, n.a. and Old National Bank will continue to be operated by such bank after the completion of the assumption by UMB Bank, n.a. of the Health Savings Accounts form Old National Bank in the above-described transaction.

This notice is published pursuant to 12 USC 1828(c) and 12 CFR 5. Any one desiring to comment on this application may do so by submitting written comments no later than June 7, 2025 to: Director of District Licensing, Comptroller of the Currency, Western District Office, Independence Plaza 1050 17th Street, Suite 1500, Denver, Colorado 80265-1050, or LicensingPublicComments@occ.treas.gov.

The public may find information regarding this application, including the date of the end of the public comment period, in the OCC Weekly Bulletin at www.occ.gov. Requests for a copy of the public file on the application should be made to the Director of District Licensing.

May 8, 2025

UMB Bank, n.a., Kansas City, Missouri

Old National Bank, Evansville, Indiana
IPL0231632
May 8,15,Jun 2 2025

INVITATION TO BID
Notice to Contractors
Sealed bids will be received by Kansas City Parks and Recreation Dept. at 4600 E. 63rd Street, Kansas City, MO 64130 until 2:00pm on **May 28, 2025**, when publicly opened and read. All Bids must comply with the Bidding Requirements of Kansas City, MO. Bids shall be submitted as sealed bids, be addressed to Director of Parks and Recreation, state on outside of envelope "Bid Enclosed", have Project title and number, and be deposited in the locked Bid box.
The proposed work includes:
Replacement of existing asphalt trail segments with new concrete trail, for segments of the Indian Creek Trail located between State Line Road and Locust St.

Plans and specifications are available at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org.
IPL0230742
May 1-2,4-9,11-16,18-23,25-28 2025

Auctions

Auctions

PETTIS COUNTY, MO LAND AUCTION - TRIPLE G ENTERPRISES LLC
Thursday, June 5, 2025 at 10:00 AM Central
57 acres: • 1 tract
The Triple G Enterprises LLC land is located 13.8 miles northeast of Sedalia, MO. Take Highway 65 north of Sedalia 11 miles to Highway J. Go east on Highway J 2.5 miles to Longwood Road. Turn left onto Longwood Road and follow 0.3 miles to property on the west side of Longwood Road. The land is further described as being located in Section 12, T47N-R21W, Pettis County, Missouri.
The land represents productive cropland.

Animals

Dogs

Mini Bernedoodle & Cockapoo
Puppies for sale! 816-383-0489
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9 weeks old, current shots, parents on site. call or text 402-432-8138

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bandgkennels.com - $650 & up
816-261-4517 / 660-224-2423

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8wk pups,blk w/tan marking, fawn, brindle. f&m's asst price 475-550. 816 288 0696 text only

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1998 Corvette Coupe
Automatic w/18,000 Original Miles, Silver w/Black Interior. Always garaged, Excellent Condition, $24,000, Pittsburg, Ks. 1-620-231-7494

THE KANSAS CITY STAR.
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Merchandise

Miscellaneous

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I will Buy your 2025 Season Tickets. Top $ Paid! Please call 800-786-8425 ext 2

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www.tips-usa.com • 866-839-8477 • tips@tips-usa.com

April 22, 2025

The Journal Record

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

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Oklahoma City, OK, 73102
Phone: 405-278-2801 Fax: -

THE JOURNAL RECORD

Affidavit of Publication

To: Region 8 Education Service Center - Shelley Black
4845 US Hwy 271 N
Pittsburg, TX, 756864303

Re: Legal Notice 4052962, Notice to Bidders

State of Oklahoma }
} SS:
County of Oklahoma }

I, Natasha Stewart, of lawful age, being duly sworn upon oath, deposes and says that I am the Authorized Designee of The Journal Record, a daily publication that is a "legal newspaper" as that phrase is defined in 25 O.S. Section 106, as amended to date, for the City of Oklahoma City, for the County of Oklahoma in the State of Oklahoma. The attachment hereto contains a true and correct copy of what was published in The Journal Record in consecutive issues on the following date(s):
PUBLICATION DATES: 05/01/2025 and 05/08/2025

(MS4052962)

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

250502 Elevators and Servicing (2 Part with JOC)

250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds)

Supplies, Equipment, Tool Rental, Sales and Services

250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

(5-1, 5-8-25)

Publishers fee: $26.10

By: 

Natasha Stewart

Sworn to me on this 8th day of May 2025

MaRanda Beeson

By: 

MaRanda Beeson
Notary Public, State of OK
No. 10001243
Qualified in Oklahoma County
My commission expires on February 18, 2026

courtroom in the Oklahoma County Courthouse. Should you know of some reason why this change of name should not be allowed you must file a written protest in the above styled and numbered cause prior to the above date with the Clerk of this Court. Should you fail to do so, the petition for change of name may be granted as prayed.

RICK WARREN
(SEAL)
Court Clerk
By Deputy
(5-1-25)

(MS4053101)
NOTICE OF PETITION FOR PUBLICATION
Case No. CV-2025-1025

IN THE DISTRICT COURT OF OKLAHOMA COUNTY STATE OF OKLAHOMA

In the Matter of the Application of: Maria Isabel Olvera Fonseca and Baldomero Zamora Soto, as next best friends of: Bryan Zamora-Olvera, Jennifer Zamora-Olvera, Jocelyn Zamora-Olvera, Jessica Zamora-Olvera, Brianna Zamora-Olvera, and Alexander Zamora-Olvera, Minor Children, to Change Names on Certificates of Live Birth

TAKE NOTICE THAT:

Maria Isabel Olvera Fonseca, as natural mother and Baldomero Zamora Soto, as biological father of Bryan Zamora-Olvera, Jennifer Zamora-Olvera, Jocelyn Zamora- Olvera, Jessica Zamora-Olvera, Brianna Zamora-Olvera, and Alexander Zamora-Olvera, have petitioned the District Court of Oklahoma County for an Order to correct their full legal names' on the minor children: Bryan Zamora-Olvera, Jennifer Zamora-Olvera, Jocelyn Zamora-Olvera, Jessica Zamora-Olvera, Brianna Zamora-Olvera, and Alexander Zamora- Olvera, birth certificates; to MARIA ISABEL OLVERA FONSECA and BALDOMERO ZAMORA SOTO

The hearing on said Petition will be heard on the 2nd day of July, 2025, at 1:30 o'clock p.m., before the Honorable Judge Andrews, Judge of the District Court of Oklahoma County, Oklahoma County Courthouse, Oklahoma City, Oklahoma.

Any person may file a written protest in this matter prior to the date for hearing

RICK WARREN
(SEAL)
Court Clerk
By Deputy

Tamer Shawareb, P.C., OBA #19567
228 Robert S. Kerr, Suite 715
Oklahoma City, OK 73102
Telephone No.:(405) 228-2552
Fax No.: (405) 228-2525
tshawareb@yahoo.com
Attorney for Petitioner
(5-1-25)

Construction

(MS4052867)
NOTICE TO BIDDERS
INVITATION TO BID NUMBER 2425-55

The City of Norman, Oklahoma, will receive sealed bids in the Office of the City Controller, Purchasing Division of the City of Norman, located at 225 N. Webster Ave., Development Center, Norman, Oklahoma 73069, until 2 P.M., local time, Thursday, May 29, 2025 for furnishing all required materials, equipment, tools and labor to perform all necessary work for the

FYE 2026 Concrete Sidewalk Projects

Bids will not be accepted after 2:00 pm at which time bids will be opened and read aloud. The project consists of sidewalk, driveway and curb and gutter removal and placement. Bidders are expected to inspect the site(s) of the work and to inform themselves regarding all local conditions.

Project Documents including Specifications and Maps may be obtained at the Office of the City Engineer located at 225 N. Webster Ave., Norman, Oklahoma at no cost. Any person with disabilities, requiring special accommodations shall contact the City of Norman-City Controller, Purchasing Division no later than 7 days prior to bid opening.

A non-mandatory Pre-bid Conference will be held on Thursday, May 15, 2025 from 11:00 a.m. to 12:00 p.m. in Conference Room B, located at 225 N Webster Ave., Norman, Oklahoma 73069. Questions related to this contract will be answered up to 4:00 p.m. on Wednesday, May 21, 2024.

All bids must be marked with the following statement: Bid for the "FYE 2026 Concrete Sidewalk Projects"

THE CITY RESERVES THE RIGHT TO REJECT ANY AND ALL BIDS.
(5-1, 5-8-25)

(MS4052870)
INVITATION TO BIDDERS

The OKC Fairgrounds, hereinafter referred to as Owner and Flintco, LLC hereinafter called the Construction Manager, will receive SEALED bids to provide the work included in the OKC Fairgrounds - Gateway of Champions Promenade in Oklahoma City, Oklahoma, on May 29, 2025 at 2:00 PM CST. All properly sealed and labeled bids will be received at the Flintco Office 1225 N. Broadway, STE 105 OKC, OK 73103 at which time proposals will be opened and read aloud.

Bid Phase 2: May 29, 2025 at 2:00 PM CST Pre-Bid - May 12, 2025 at 10:00 AM CST
Bid Package 03A - Concrete
Bid Package 04A - Masonry
Bid Package 07A - Roofing
Bid Package 08A - Doors/ Frames/Hardware
Bid Package 13A - Pre-Engineered Metal Building
Bid Package 24A - Plumbing and Mechanical
Bid Package 26A - Electrical
Bid Package 31A - Earthwork
Bid Package 33A - Utilities

All bids are to be sealed and CLEARLY labeled by describing the project and indicating the package being bid, on the envelope as described in the Instructions to Bidders. A Bid Security, as stipulated in the bid documents, in the amount of 5% of the bid shall accompany the sealed proposal of each bidder if the amount of the bid exceeds $50,000.

Bids received more than ninety-six (96) hours, excluding Saturdays, Sundays, and Holidays, before time set for opening bids, as well as bids received after time set for opening bids, will not be considered and will be returned unopened.

The Contract and Bidding Documents will be available for examination beginning February 25, 2025 at the main office of the Construction Manager between the hours of 8:00 a.m. to 5:00 p.m., Monday through Friday. Please contact Josh Patterson or Mike Atkinson with Flintco at okcestimating@flintco.com with any questions about bid procedures or documents. Copies of the contract and bidding documents, including the drawings and specifications, may also be reviewed at the Dodge Plan Room, Southwest Construction News and Bid News Construction Reports.

The Owner and Construction Manager will conduct a pre-bid conference at the1225 N. Broadway STE 105, OKC, OK 73103 for the purpose of review of the bidding documents, bidding procedures and to receive Bidders' questions. The pre-bid conference is scheduled for as noted above.

All Bidders for this project are required to meet all qualification requirements as established in these bid documents. Upon receipt of an acceptable bid, the contract will be awarded within sixty (60) days after opening bids and the written contract executed within ninety (90) days thereafter.

The Owner reserves the right to reject any or all bids or to waive any informalities or irregularities in the bidding.
(5-1, 5-8-25)

(MS4052893)
ADVERTISEMENT FOR BID
Project: NW Classen High School Addition

Oklahoma City Public Schools (OKCPS) Independent School District #89 of Oklahoma County, c/o Lippert Bros., Inc. acting as Construction Manager, is taking separate sealed bids on various Bid Packages for Bid Group #3 for NW Classen High School Addition project, located at 2801 NW 27th Street, Oklahoma City, OK 73107. Bids will be received at Lippert Bros., Inc.'s offices located at 2211 E. I-44 Service Road, Oklahoma City, OK 73111 no later than May 22, 2025 at 2:00 p.m. Bids will be opened and read out loud.

Any bids that are submitted via shipping carrier must be sent to Lippert Bros., Inc., Construction Manager, to 2211 East I-44 Service Road, Oklahoma City, OK 73111 and received prior to 1:00 p.m. on May 22, 2025, to be deemed admissible as a bid to be opened at 2:00 p.m. the same day.

Said bids will be publicly opened and read aloud following the time stated above. Bids received more than ninety-six (96) hours, excluding Saturdays, Sundays, and Holidays, before the time set for opening bids, as well as bids received after the time set for opening of bids, will not be considered, and will be returned unopened.

Owner
Oklahoma City Public Schools (OKPS)
2500 NE 30th Street
Oklahoma City, OK 73111
Architect
JHBR Architecture
600 NE 4th Street, Suite 200
Oklahoma City, OK 73104
Construction Manager:
Lippert Bros., Inc.
Physical: 2211 E. I-44 Service Road, Oklahoma City, OK 73111
Mailing: PO Box 17450, Oklahoma City, OK 73136-1450
Phone : 405-478-3580, Fax : 405-478-3301
Shane VanOosten
svanoosten@lippertbros.com
Project Description :
Bid Group #3 consists of the
Bid Packages Contained in this Advertisement for Bid Group No. 03
07.3 Metal Plate Wall Panels
09.3 Painting and Wall Coverings - Re-bid
11.0 Food Service
12.1 Furniture, Fixtures and Equipment
Availability of Bidding Documents:
Contract documents will be on file at the Construction Manager's Office, Bid News/iSqFt and Reidprographics. Bidders may also obtain electronic access to bid documents by applying to the office of the Construction Manager.
Pre-Bid Conference:
A non-mandatory pre-bid conference will be held on May 14, 2025 at 3:30 p.m. located at Northwest Classen High School located at 2801 NW 27th Street, Oklahoma City, OK 73107. Attendees to go to the main entrance to the building on the southwest side of the building to be directed on the meeting room location.
Notes: Bids over $50,000 will be required to include payment and performance bond bonds in their bid amount. Additional bid packages may be issued later as required. Women-owned and minority business enterprises are encouraged to participate in this project. A 5% Bid Bond or Certified or cashier's check is required for bids more than $50,000.00. The Owner has the right to reject any or all bids.
(5-1, 5-8-25)

(MS4052903)
OKLAHOMA CITY PUBLIC SCHOOLS

Sealed Quotations are requested by the Board of Education of the Oklahoma City Public Schools, District I-89, Oklahoma County, Oklahoma, electronically to bids@okcps.org, no later than the listed date for furnishing:

RFP 26-023 Grease Trap Services (Bid Closes May 22, 2025 @ 2:00pm)

The Board of Education of Independent School District I-89 of Oklahoma County, Oklahoma, is under no obligation to accept any proposal and reserves the right to accept or reject any or all proposals. The Board of Education also reserves the right to make such selections as in its judgment is best suited for the purpose intended.

INSTRUCTIONS:

All proposals shall be submitted electronically, in compliance with the Request for Proposal (RFP) document. Additional RFP documents, specifications and/or description of equipment and/or services desired, are available by emailing bids@okcps.org. All proposals shall adhere to the conditions as set forth in the bid document.

The Oklahoma City Public School District is committed to a policy of equal employment opportunity and affirmative action, and does not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin, or handicap. Utilization of any agency for goods and services is predicated upon it adherence to a similar policy of nondiscrimination and affirmative action.
(5-1-25)

(MS4052962)

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250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds)
Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.
(5-1, 5-8-25)

(MS4053082)
SOLICITATION FOR BIDS (BID NOTICE)

Sealed bids will be received by Edmond Public Schools, c/o Dowell-Pontikos Construction, as Construction Manager for the Edmond Public Schools, 200 N. Kelly, Edmond, OK 73034, up to and including the date and time indicated below, and will be opened and read aloud publicly at Edmond Public Schools after the time indicated. Complete sets of the Bidding Documents, including a Contractor's Qualification Statement, General and Supplemental Conditions, Specifications and Construction Plans are on file in the offices of the Construction Manager, 617 NW 27th St., Moore, OK 73160 and are open for public inspection. PDF Files of the drawings and Specs may be obtained by contacting Dowell Pontikos Construction (Sarah Short), at the above address or at: Phone: 405-735-7385 Email: sarah@dowellpontikos.com

Project Name: Edmond Santa Fe Freshman Academy (Site Packages Only)
Bid Package 1-Site Demo
Bid Package 2-Utilities
Bid Package 3-Partial Site Concrete
Project Location: 1901 W. 15th St. Edmond, Ok 73013
Cost Estimate: $1,500,000.00
Bid Documents Available: Electronic Files or Hard Copies
Fee for Bid Documents: Electronic Files (Free) Hard Copies ($600.00)
Bid Opening Date: Wednesday, May 28th, 2025
Bid Opening Time: 1:00 P.M.
Contact Person (s): Jon Dowell
Dowell Pontikos Construction
Construction Manager for Edmond Public Schools
Phone: 405-735-7385
Email: Jon@dowellpontikos.com
Bid Bond:

If a bid exceeds $50,000, a cashier's check, a certified check or surety bid bond in the amount of five percent (5%) of the total bid shall accompany the sealed bid of each bidder, designating the Edmond Public Schools and Dowell-Pontikos Construction as dual obligees. Security checks will be returned to all but the three lowest bidders after the bid opening. The three lowest bid securities will be retained as provided in the Instructions to Bidders.

Bids received more than ninety-six (96) hours, excluding Saturday, Sundays and holidays, before the time set for opening of bids, as well as bids received after the time set for opening bids, will not be considered and will be returned unopened. The Owner/Construction Manager reserve the right to reject any or all bids and to waive all formalities or minor irregularities. The time period within which a Subcontract Agreement will be executed following award to the successful bidder is ten (10) days.
(5-1, 5-8-25)

(MS4047928)
Request for Proposals

Deer Creek Public Schools will be receiving sealed bid RFQ's for our Fire Alarms & Sprinkler System Servicing, Maintenance, and Monitoring System. Bids will be received until 2:00 p.m. May 8, 2025, then opened and read aloud at 2:15 p.m. Deer Creek Board of Education reserves the right to reject any or all bids and waive any formalities. The Deer Creek Public Schools will be holding a Mandatory Bid Meeting and Walk Through for those interested in submitting a bid for any of these Request For Quotes (RFQ). The meeting will be held on Wednesday, April 23, 2025 at 10:00 A.M. at our Administration Building (20701 NW MacArthur Edmond, OK, 73012). On the NW corner of the Roundabout.
(4-14 through 5-8-2025)

(MS4050980)
INVITATION TO BID

The Oklahoma City Housing Authority (OCHA) located at 1700 Northeast Fourth Street, Oklahoma City, Oklahoma, is requesting sealed bids for OCHA Lilyfield Renovation (IFB-25001). ALL BIDDERS MUST REGISTER with the Housing Agency Marketplace (HAM) at the following link:ha.internationaleprocurement.com. A Prebid Conference will be held at 9:00am., Thursday, May 1, 2025, at 1607 SW 15th Street, Oklahoma City, Oklahoma. Attendance is encouraged for all interested bidders. Questions and requests for substitutions must be submitted online via the HAM website by 1:00 p.m., Wednesday, May 7, 2025. Sealed bids shall be delivered to 1700 Northeast Fourth Street before 1:30pm on May 16, 2025 at which time bids will be publicly opened and read aloud. The Oklahoma City Housing Authority is an Equal Employment Opportunity and Equal Housing Opportunity entity.
(4-24, 5-1-25)

(MS4051876)
NOTICE OF SOLICITATION TO BID
Bid #2-SFB-25-014
OKLAHOMA CITY COMMUNITY COLLEGE CAMPUS PAVING REPAIRS FY2025

ANNOUNCEMENTS ON THE DAY OF BID OPENING SUPERSEDE ALL OTHER ANNOUNCEMENTS, ORAL OR WRITTEN.

Oklahoma City Community College will conduct a sealed bid process with public bid opening on **Thursday, May 22, 2025**. Sealed bids must be received by **2:00 p.m. CST** with public bid opening beginning immediately following in the OCCC John Massey Center, Room 143.

A mandatory Pre-Bid meeting will be held for this project on Friday, May 9, 2025 on the OCCC Main Campus, Library Room 407, 7777 South May Avenue, Oklahoma City, OK beginning at 10:00 a.m. CST. Notification of attendance must be made prior to the pre-proposal conference.

For additional information and a bid packet access visit https://www.occc.edu/purchasing/bid/ or contact Craig Sisco, Purchasing Director at michael.c.sisco@occc.edu.
(4-29, 4-30, 5-1, 5-2, 5-5, 5-6, 5-7, 5-8, 5-9-25)

Miscellaneous

(MS4042193)
WAIVER CONSENT NOTICE

From: The Church of The Servant
1027 NE 63rd Street
Oklahoma City, OK 73111
To: Whom it may concern
Re: Waiver Consent Notice

I, Pastor Michael Alexander, of the Church Triumphant, am formally writing this Written Consent Waiver notice to Springlake Loung, LLC, 3725 Springlake Dr., OKC, OK, 73111, referencing the ABLE Commission to waive the 300 ft. requirement of a Church, Title 37A, Section 2-139 of the Oklahoma Statutes Laws, for Springlake Lounge, LLC, to acquire any needed licenses for the sake of conducting business at their facility.

Please feel free to contact me if you have any questions or concerns.
(405) 886-0047
Pastor Michael Alexander
s/Michael Alexander, Pastor
The Church Triumphant Ministries
(3-27 through 5-6-2025)

(MS4051220)

The City of Oklahoma City, Oklahoma Public Works Department, in accordance with National Flood Insurance Program regulation 65.7(b)(1), hereby gives notice of the City of Oklahoma City, Oklahoma intent to revise the flood hazard information, generally located between SW 36th Street and SW 29th Street along South MacArthur Boulevard. Specifically, the flood hazard information shall be revised along North Canadian River Tributary 13 from a point approximately 665 feet south of SW 29th Street to a point approximately 1,575 feet south of SW 29th Street.

As a result of the revision, the floodway shall widen and narrow and be established the 1% annual chance water- surface elevations shall increase and decrease, and the 1% annual chance floodplain shall widen and narrow and be established within the area of revision.

Maps and detailed analysis of the revision can be reviewed at the City of Oklahoma City at 420 West Main Street, Oklahoma City, Oklahoma. Interested persons may call Blaine Sheffield at 405-297-2581 for additional information from 8 am to 5 pm Monday -- Friday.
(4-24, 5-1-25)

Hearings and Minutes

(CD4052823)
NOTICE OF HEARING
Cause CD No 2025-001420

BEFORE THE CORPORATION COMMISSION OF THE STATE OF OKLAHOMA

APPLICANT: CAMINO NATURAL RESOURCES, LLC. RELIEF SOUGHT: MULTIUNIT HORIZONTAL WELL. LEGAL DESCRIPTION: Section 31, Township 10 North, Range 6 West of the IM, and Section 6, Township 9 North, Range 6 West of the IM, Grady County, Oklahoma

STATE OF OKLAHOMA TO: All persons, owners, producers, operators, purchasers and takers of oil and gas, and all other interested persons, particularly in Grady County, Oklahoma, including the following: 89 ENERGY II MINERALS, LLC; A.E. EWELL INVESTMENT CO.; A.E. EWELL INVESTMENT CO.; ALBERT ODOM; ALBERT ODOM; AMY BETH LONG; ARAPAHO LAND COMPANY LLC; BARBARA ANNE LASSITER; BETTY JO CULP; BETTY JO CULP BARROW; BETTY LOU COX; BROWN FAMILY TRUST DATED 01/08/14, AND THE TRUSTEE OF SUCH TRUST; BROWN FAMILY TRUST DATED 01/08/14, AND THE TRUSTEE OF SUCH TRUST; CARL ODOM, DECEASED; CARLA GIBSON; CARLA GIBSON; CAROLINE M. KILGO, TRUSTEE OF THE CAROLINE M. KILGO TRUST UNDER AGREEMENT DATED

License Applications

(MS4053092)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Feast, LLC dba Feast,The World's Buffet Tejal Patel 6512 NW Expressway Oklahoma City OK 73132 a Limited Liability Company hereby publishes notice of it intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Mixed Beverage License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Mixed Beverage establishment with business premises located at 6512 NW Expressway Oklahoma City OK 73132 in Oklahoma City, Oklahoma County, Oklahoma, under the business name of Feast, LLC dba Feast The World's Buffet

Dated this 28th day of April, 2025.

Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Tejal Patel

County of Oklahoma, State of Oklahoma.

Before me, the undersigned notary public, personally appeared: Tejal Patel to me known to be the person(s) described in and who executed the foregoing application and acknowledged that She executed the same as Her free act and deed.

Sadia K. Cheema
(Seal)
Notary Public
My commission expires September 25, 2026, #22012975
(5-1, 5-8-25)

(MS4051095)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Lotspot LLC dba Breeze In & Out Md Robiul Awal Bhuiyan,112 S Bryant Ave, Edmond, OK, 73034 a/an Limited Liability Company hereby publishes notice of it intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Retail Wine License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Retail Wine establishment with business premises located at 112 S Bryant Ave, Edmond, OK, 73034 in Edmond, Oklahoma County, Oklahoma, under the business name of Lotspot LLC dba Breeze In & Out

Dated this 21st day of April, 2025.

Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Md Robiul Awal Bhuiyan

County of Oklahoma, State of Oklahoma.

Before me, the undersigned notary public, personally appeared: Md Robiul Awal Bhuiyan to me known to be the person(s) described in and who executed the foregoing application and acknowledged that He executed the same as His free act and deed.

SADIA K. CHEEMA
(Seal)
Notary Public
My commission expires September 25, 2026, #22012975
(4-24, 5-1-25)

Specifications and Maps may be obtained at the Office of the City Engineer located at 225 N. Webster Ave., Norman, Oklahoma at no cost. Any person with disabilities, requiring special accommodations shall contact the City of Norman-City Controller, Purchasing Division no later than 7 days prior to bid opening.
A non-mandatory Pre-bid Conference will be held on Thursday, May 15, 2025 from 11:00 a.m. to 12:00 p.m. in Conference Room B, located at 225 N Webster Ave., Norman, Oklahoma 73069. Questions related to this contract will be answered up to 4:00 p.m. on Wednesday, May 21, 2024.
All bids must be marked with the following statement: Bid for the "FYE 2026 Concrete Sidewalk Projects"
THE CITY RESERVES THE RIGHT TO REJECT ANY AND ALL BIDS.
(5-1, 5-8-25)

(MS4052870)
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The Contract and Bidding Documents will be available for examination beginning February 25, 2025 at the main office of the Construction Manager between the hours of 8:00 a.m. to 5:00 p.m., Monday through Friday. Please contact Josh Patterson or Mike Atkinson with Flintco at okcestimating@flintco.com with any questions about bid procedures or documents. Copies of the contract and bidding documents, including the drawings and specifications, may also be reviewed at the Dodge Plan Room, Southwest Construction News and Bid News Construction Reports.

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(5-1, 5-8-25)

(MS4052893)
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Owner
Oklahoma City Public Schools (OKPS)
2500 NE 30th Street
Oklahoma City, OK 73111
Architect
JHBR Architecture
600 NE 4th Street, Suite 200
Oklahoma City, OK 73104
Construction Manager:
Lippert Bros., Inc.
Physical: 2211 E. I-44 Service Road, Oklahoma City, OK 73111
Mailing: PO Box 17450, Oklahoma City, OK 73136-1450
Phone : 405-478-3580, Fax : 405-478-3301
Shane VanOosten
svanoosten@lippertbros.com
Project Description :
Bid Group #3 consists of the Bid Packages Contained in this Advertisement for Bid Group No. 03
07.3 Metal Plate Wall Panels
09.3 Painting and Wall Coverings - Re-bid
11.0 Food Service
12.1 Furniture, Fixtures and Equipment
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(5-1, 5-8-25)

(MS4052962)

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:
250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds)
Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)
The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.
(5-1, 5-8-25)

(MS4053082)
SOLICITATION FOR BIDS (BID NOTICE)

Sealed bids will be received by Edmond Public Schools, c/o Dowell-Pontikos Construction, as Construction Manager for the Edmond Public Schools, 200 N. Kelly, Edmond, OK 73034, up to and including the date and time indicated below, and will be opened and read aloud publicly at Edmond Public Schools after the time indicated. Complete sets of the Bidding Documents, including a Contractor's Qualification Statement, General and Supplemental Conditions, Specifications and Construction Plans are on file in the offices of the Construction Manager, 617 NW 27th St., Moore, OK 73160 and are open for public inspection. PDF Files of the drawings and Specs may be obtained by contacting Dowell Pontikos Construction (Sarah Short), at the above address or at: Phone: 405-735-7385 Email: sarah@dowellpontikos.com
Project Name: Edmond Santa Fe Freshman Academy (Site Packages Only)
Bid Package 1-Site Demo
Bid Package 2-Utilities
Bid Package 3-Partial Site Concrete
Project Location: 1901 W. 15th St. Edmond, Ok 73013
Cost Estimate: $1,500,000.00
Bid Documents Available: Electronic Files or Hard Copies
Fee for Bid Documents: Electronic Files (Free) Hard Copies ($600.00)
Bid Opening Date: Wednesday, May 28th, 2025
Bid Opening Time: 1:00 P.M.
Contact Person (s): Jon Dowell
Dowell Pontikos Construction
Construction Manager for Edmond Public Schools
Phone: 405-735-7385
Email: Jon@dowellpontikos.com
Bid Bond:
If a bid exceeds $50,000, a cashier's check, a certified check or surety bid bond in the amount of five percent (5%) of the total bid shall accompany the sealed bid of each bidder, designating the Edmond Public Schools and Dowell-Pontikos Construction as dual obligees. Security checks will be returned to all but the three lowest bidders after the bid opening. The three lowest bid securities will be retained as provided in the Instructions to Bidders.
Bids received more than ninety-six (96) hours, excluding Saturday, Sundays and holidays, before the time set for opening of bids, as well as bids received after the time set for opening bids, will not be considered and will be returned unopened. The Owner/Construction Manager reserve the right to reject any or all bids and to waive all formalities or minor irregularities. The time period within which a Subcontract Agreement will be executed following award to the successful bidder is ten (10) days.
(5-1, 5-8-25)

Sheriff's Sale

(SS4055166)
FIRST ALIAS NOTICE OF SHERIFF'S SALE
Case No. CJ-2024-5510
Judge Don Andrews

JPMORGAN CHASE BANK, NATIONAL ASSOCIATION, Plaintiff, v. TERRY B FISHER, DECEASED; KRISTI L. FISHER; SPOUSE, IF ANY, OF KRISTI L. FISHER; JOHN DOE, OCCUPANT; AND UNITED STATES OF AMERICA EX REL. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT Defendant(s).

NOTICE IS GIVEN to Terry B Fisher, Deceased; Kristi L. Fisher; Spouse, if any, of Kristi L. Fisher; John Doe, Occupant; United States of America ex rel. Department of Housing and Urban Development, and their unknown successors and assigns, that on June 17, 2025, at 10:00 am., 4205 North Lincoln Blvd, the Sheriff of said County will offer for sale and sell for cash at public auction to the highest and best bidder, with appraisement, all that certain real estate in Oklahoma County, Oklahoma, to wit:

LOT ELEVEN (11) IN BLOCK FOUR (4) IN LEAVITT'S NORTH PARK ADDITION NO. 2, TO EDMOND, OKLAHOMA COUNTY, OKLAHOMA, ACCORDING TO THE RECORDED PLAT THEREOF.

PROPERTY ADDRESS: 4210 Jordan Avenue, Edmond, OK 73013

subject to taxes and tax sales, said property being duly appraised at $125,000.00.

Sale will be made pursuant to an Order of Sale issued upon a judgment entered in the District Court of Oklahoma County, Oklahoma, in Case No. CJ-2024-5510, wherein JPMorgan Chase Bank, National Association is Plaintiff and Terry B. Fisher is/are Defendant(s) to satisfy said judgment in the sum of $114,274.84 together with interest at 6.625% per annum from January 1, 2024, and a deferred principal balance of $25,843.15, until paid, attorney's fee in the amount of $3,000.00, abstracting cost of $975.00, late charges, all advances for taxes, insurance premiums, property preservation expenses, and other fees or expenses incurred prior to or during the pendency of this action, and costs of this action.

WITNESS MY HAND this 30th day of April, 2025.

Tommy Johnson, III
Sheriff of Oklahoma County Oklahoma
LOGS LEGAL GROUP LLP
770 NE 63rd St.
Oklahoma City, OK 73105-6431
(405) 848-1819
Attorneys for Plaintiff
File No. 24-140871
(5-8, 5-15-25)

(SS4055196)
NOTICE OF SHERIFF'S SALE
Case No. CJ-2024-5421
Judge Sheila Stinson

U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION, AS TRUSTEE, AS SUCCESSORIN-INTEREST TO U.S. BANK NATIONAL ASSOCIATION, AS TRUSTEE FOR MASTR ASSET BACKED SECURITIES TRUST 2006- HE3, MORTGAGE PASS-THROUGH CERTIFICATES, SERIES 2006-HE3, Plaintiff, v. DENNIS WEST; SPOUSE, IF ANY, OF DENNIS WEST; JOHN DOE A/K/A STEPHANIE HEDRICK, OCCUPANT; AND VAK CAPITAL TRUST I Defendant(s).

NOTICE IS GIVEN to Dennis West; Spouse, if any, of Dennis West; John Doe, Occupant; VAK Capital Trust I, and their unknown successors and assigns, that on **June 17, 2025, 10:00AM**, 4205 N. Lincoln Blvd Oklahoma City, OK 73105 - North Entrance, the Sheriff of said County will offer for sale and sell for cash at public auction to the highest and best bidder, with appraisement, all that certain real estate in Oklahoma County, Oklahoma, to wit:

LOT FOUR (4), BLOCK THIRTY-ONE (31), BLOCKS THIRTY (30) TO THIRTY-EIGHT (38) INCLUSIVE, TO WARR ACRES, OKLAHOMA COUNTY, OKLAHOMA, ACCORDING TO THE RECORDED PLAT THEREOF.

PROPERTY ADDRESS: 6221 Reeves Court, Oklahoma City, OK 73122

subject to taxes and tax sales, said property being duly appraised at $75,000.00.

Sale will be made pursuant to an Order of Sale issued upon a judgment entered in the District Court of Oklahoma County, Oklahoma, in Case No. CJ-2024-5421, wherein U.S. Bank Trust Company, National Association, as trustee, as successor-in-interest to U.S. Bank National Association, as Trustee for MASTR Asset Backed Securities Trust 2006-HE3, Mortgage Pass-Through Certificates, Series 2006-HE3 is Plaintiff and Dennis West is/are Defendant(s) to satisfy said judgment in the sum of $63,799.34 together with interest at 2.4241% per annum or at the current adjustable rate from February 1, 2024, and a deferred principal balance of $5,061.08, until paid, attorney's fee in the amount of $3,000.00, abstracting cost of $975.00, late charges, all advances for taxes, insurance premiums, property preservation expenses, and other fees or expenses incurred prior to or during the pendency of this action, and costs of this action.

WITNESS MY HAND this 22nd day of April, 2025.

Tommy Johnson, III
Sheriff of Oklahoma County Oklahoma
LOGS LEGAL GROUP LLP
770 NE 63rd St.
Oklahoma City, OK 73105-6431
(405) 848-1819
Attorneys for Plaintiff
File No. 24-140799
(5-8, 5-15-25)

(SS4055199)
NOTICE OF SHERIFF'S SALE
Case No. CJ-2023-5623
Judge Don Andrews

NATIONSTAR MORTGAGE LLC, Plaintiff, v. STEPHANIE SHANAE GREENHOWARD A/K/A STEPHANIE GREENHOWARD; JAMES BUNYAN GREENHOWARD, IV A/K/A JAMES GREENHOWARD A/K/A JAMES GREENHOWARD IV A/K/A JAMES BUNYAN GREENHOWARD; JOHN DOE, OCCUPANT; AND STATE OF OKLAHOMA EX REL. OKLAHOMA TAX COMMISSION Defendant(s).

NOTICE IS GIVEN to Stephanie Shanae Greenhoward; James Bunyan Greenhoward, IV; John Doe, occupant; State of Oklahoma ex rel. Oklahoma Tax Commission, and their unknown successors and assigns, that on **June 17, 2025, 10:00AM**, 4205 N. Lincoln Blvd Oklahoma City, Ok 73150 - North Entrance, the Sheriff of said County will offer for sale and sell for cash at public auction to the highest and best bidder, with appraisement, all that certain real estate in Oklahoma County, Oklahoma, to wit:

LOT NINE (9), BLOCK ONE (1), WOODSIDE, AN ADDITION TO MIDWEST CITY, OKLAHOMA COUNTY, OKLAHOMA, ACCORDING TO THE RECORDED PLAT THEREOF.

PROPERTY ADDRESS: 3200 Del Rey Drive, Midwest City, OK 73110

subject to taxes and tax sales, said property being duly appraised at $210,000.00.

Sale will be made pursuant to an Order of Sale issued upon a judgment entered in the District Court of Oklahoma County, Oklahoma, in Case No. CJ-2023-5623, wherein Nationstar Mortgage LLC is Plaintiff and Stephanie Shanae Greenhoward and James Bunyan Greenhoward IV is/are Defendant(s) to satisfy said judgment in the sum of $154,607.96 together with interest at 5.625% per annum from November 1, 2022, until paid, attorney's fee in the amount of $2,700.00, abstracting cost of $875.00, late charges, all advances for taxes, insurance premiums, property preservation expenses, and other fees or expenses incurred prior to or during the pendency of this action, and costs of this action.

WITNESS MY HAND this 22nd day of April, 2025.

Tommy Johnson, III
Sheriff of Oklahoma County Oklahoma
LOGS LEGAL GROUP LLP
770 NE 63rd St.
Oklahoma City, OK 73105-6431
(405) 848-1819
Attorneys for Plaintiff
File No. 23-139851
(5-8, 5-15-25)

Hearings and Minutes

(CD4054958)
NOTICE OF HEARING
CASE CD 2025-001499

BEFORE THE CORPORATION COMMISSION OF THE STATE OF OKLAHOMA

APPLICANT: SURGE ENERGY TECHNOLOGIES, LC RELIEF SOUGHT: VERTICAL DRILLING AND SPACING UNITS LEGAL DESCRIPTION: E/2 SE/4 NE/4 AND E/2 NE/4 SE/4 OF SECTION 8 AND W/2 OF SECTION 9, TOWNSHIP 3 NORTH, RANGE 1 EAST, GARVIN COUNTY, OKLAHOMA

NOTICE IS HEREBY GIVEN that Applicant requests that the Commission enter an order:

(a) vacating Order No. 105748, insofar as said order established 160-acre drilling and spacing units for the production of gas and gas condensate from the McLish and Oil Creek common sources of supply underlying the NW/4 of said Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma;

(b) vacating Order No. 127830, insofar as said order established 40-acre drilling and spacing units for the production of oil and gas from the Pennsylvanian Sands and the Bromide Sands of supply underlying the E/2 SW/4 of said Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma;

(c) establishing 160-acre drilling and spacing units for the production of gas and gas condensate from the Permian, Cisco, Hoxbar, Bromide, McLish, Oil Creek and Arbuckle common sources of supply underlying the E/2 SE/4 NE/4 and E/2 NE/4 SE/4 of Section 8, Township 3 North, Range 1 East, Garvin County, Oklahoma, and the SW/4 NW/4, W/2 SE/4 NW/4, NW/4 SW/4 and W/2 NE/4 SW/4 of Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma. Applicant further requests that the order to be entered in this cause be made effective on some date prior to the date of the hearing; and

(d) establishing 100-acre drilling and spacing units for the production of gas and gas condensate from the Permian, Cisco, Hoxbar, Bromide, McLish, Oil Creek and Arbuckle common sources of supply underlying the N/2 NW/4 and E/2 SE/4 NW/4 and the S/2 SW/4 and E/2 NE/4 SW/4 of Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma. Applicant further requests that the order to be entered in this cause be made effective on some date prior to the date of the hearing.

License Applications

(MS4055191)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Bricktown Catering LLC 429 Kings of Leon Lane OKC, OK 73104 a/an limited liability company hereby publishes notice of its intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Caterer/Storage License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Caterer/Storage establishment with business premises located at 425 Kings of Leon Lane, Ste A in Oklahoma City, Oklahoma County, Oklahoma, under the business name of Bricktown Catering
Dated this 6th day of May, 2025.
Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Brent Brewer
County of Oklahoma, State of Oklahoma.
Before me, the undersigned notary public, personally appeared: Brent Brewer to me known to be the person(s) described in and who executed the foregoing application and acknowledged that he executed the same as his free act and deed.
Randy Malone
(Seal) Notary Public
My commission expires June 3, 2028, #08005424
(8-5, 8-15-25)

(MS4055204)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Diamond Ring 2020 LLC DBA Phaka Thai & Japanese Cuisine a/an Diamond Ring 2020 LLC hereby publishes notice of Her intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Beer & Wine License under authority of and in compliance with the said Act: That She intend(s), if granted such license to operate as a Beer & Wine establishment with business premises located at 1012 NW 150th Street in Edmond, Oklahoma County, Oklahoma, under the business name of Phaka Thai & Japanese Cuisine
Dated this 6th day of May, 2025.
Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Suthathip
County of Oklahoma, State of Oklahoma.
Before me, the undersigned notary public, personally appeared: Suthathip to me known to be the person(s) described in and who executed the foregoing application and acknowledged that they executed the same as their free act and deed.
MaRanda Beeson
(Seal) Notary Public
My commission expires February 18, 2026, #10001243
(5-8, 5-15-25)

(MS4053092)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Feast, LLC dba Feast,The World's Buffet Tejal Patel 6512 NW Expressway Oklahoma City OK 73132 a Limited Liability Company hereby publishes notice of it intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Mixed Beverage License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Mixed Beverage establishment with business premises located at 6512 NW Expressway Oklahoma City OK 73132 in Oklahoma City, Oklahoma County, Oklahoma, under the business name of Feast, LLC dba Feast The World's Buffet
Dated this 28th day of April, 2025.
Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Tejal Patel
County of Oklahoma, State of Oklahoma.
Before me, the undersigned notary public, personally appeared: Tejal Patel to me known to be the person(s) described in and who executed the foregoing application and acknowledged that She executed the same as Her free act and deed.
Sadia K. Cheema
(Seal) Notary Public
My commission expires September 25, 2026, #22012975
(5-1, 5-8-25)

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477 • tips@tips-usa.com

April 22, 2025

Springfield News-Leader

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

LocaliQ
Missouri
GANNETT

PO Box 631339 Cincinnati, OH 45263-1339

AFFIDAVIT OF PUBLICATION

Brooke Scott
Purchasing Cooperative Region 8 Education Service Center
4845 Us Highway 271 N
Pittsburg TX 75686-4303

STATE OF WISCONSIN, COUNTY OF BROWN

I do upon my oath state that I am the Legal Clerk of the Springfield News-Leader/Guidon, and that I am duly authorized to and do make this affidavit for and on behalf of the News-Leader, a newspaper published daily in the City of Springfield, Greene County, Missouri; that the public advertisement, notice or order of Publication, a true copy of which is hereto attached, was published in said newspaper in the issues dated:

05/01/2025, 05/08/2025

Sworn to and subscribed before on 05/08/2025

Legal Clerk

Notary, State of WI, County of Brown

3.7.27

My commission expires

Publication Cost:	$131.40	
Tax Amount:	$0.00	
Payment Cost:	$131.40	
Order No:	11249460	# of Copies:
Customer No:	1010399	1
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THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

KAITLYN FELTY
Notary Public
State of Wisconsin

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
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The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

Classifieds

To Advertise, visit our website: **classifieds.news-leader.com**
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All classified ads are subject to the applicable rate card, copies of which are available from our Advertising Dept. All ads are subject to approval before publication. Springfield News-Leader reserves the right to edit, refuse, reject, classify or cancel any ad at any time. Errors must be reported in the first day of publication. Springfield News-Leader shall not be liable for any loss or expense that results from an error in or omission of an advertisement. No refunds for early cancellation of order.

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Your Source Public Notices for the latest...

Bids & Proposals

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
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The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

SELL IT BUY IT FIND IT
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Govt Bids & Proposals

NOTICE TO CONTRACTORS

OWNER: The Board of Governors for the Missouri State University

Submitted bids for the FY25 PARKING LOT MAINTENANCE, SPRINGFIELD CAMPUS must be received electronically through our e-bidding service provider, DemandStar at https://www.demandstar.com/app/agencies/missouri/missouri-state-university/procurement-opportunities/f6e6a3d7-625e-4022-8b68-c47f650addc0/, by 2:00 p.m. on May 13, 2025. Submitted bids will then be publicly opened and read aloud. With each proposal, a certified check or bid bond properly executed by the bidder in the amount of five percent (5%) of the bid shall be submitted.

Further information on plans, specifications, and our e-bidding service provider, DemandStar can be obtained at https://plans.missouristate.edu/.

Attention of bidders is particularly called to the requirements as to the conditions of employment to be observed. Bidders must agree to comply with the prevailing wage rate provisions and other statutory regulations as referred to in the specifications.
MSU is an AA/EO institution.

Public Notices

Compensation Study
The LIBRARY
Springfield-Greene County Library District

The Springfield-Greene County Library District (The Library) is seeking a qualified compensation analysis consultant to conduct a comprehensive review of our current compensation structure, including salary levels, job grading, and market competitiveness, to ensure internal equity and attract and retain top talent. The deadline for receiving the proposal shall be Friday, May 16, 2025. Direct all questions concerning the RFP to: Human Resource Director, Lori Ruzicka at 417-616-0561 or humanresources@thelibrary.org.
April 28, 29, 30, May 1, 2 2025
LCLM0285084

Find your new job HERE!

Bids & Proposals

Crossland Construction Company is accepting bids for Dadeville Schools, located at 17 Bearcat Trail Dadeville, MO, 65635. A complete scope of work and bid package/bid form can be obtained through the contacts listed below. Potential subcontractors must meet Crossland's qualification requirements (insurance, safety policies, bonding, etc). If you are interested in bidding on this project, please contact Ernie Perkins or Jeff Groven at bid@crossland.com. Main office phone is 417-368-3957.

Having A Garage Sale?

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The World's Lightest Wheelchair

For those of us who've found daily activities becoming more challenging, there's a remarkable breakthrough in mobility that's changing lives. This ultra-lightweight wheelchair is nothing like the bulky and heavy models of yesterday weighing over 35lbs! - imagine gliding effortlessly through your garden again, joining your family at the park, or meeting friends for coffee, all without worry of fatigue or dependency. Why not take that first step toward renewed freedom? Your next chapter of independence is here.



Throughout the ages, there have been significant advancements in mobility aids. From canes to walkers, rollators, and scooters, these devices were created to help those with mobility issues maintain their independence. However, there haven't been any truly revolutionary new products in this field until now. Until now, that is, because a team of engineers has developed something that's set to change the game. They've created the world's lightest wheelchair, weighing only 13.5 lbs, a personal mobility solution that's been called a game-changer. It's called the **Featherweight Wheelchair**, and there is nothing out there quite like it.

The first thing you'll notice about the **Featherweight Wheelchair** is how light it is! This is the world's lightest wheelchair at 13.5lbs, making it possible for anyone to lift into a vehicle. It's modern design and custom color options make it very lightweight, durable, and great to look at.



Why take our word for it? Call now, and **receive $50 Off** when you purchase a **Matte Black Featherweight Wheelchair! Only $599!** Mention CODE 50FEATHER to start your journey towards effortless mobility.

Jennifer F. us
Verified Buyer
01/09/25

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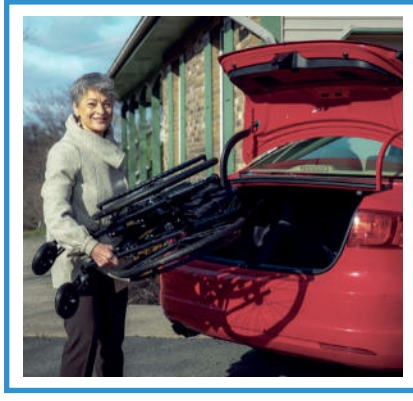
It's so light weight that it's no problem to lift in and out of the back of my car. It's also easy to set up and collapse down. It is very compact and the wheels come off for compact packing alongside luggage or groceries etc. My Mom finds it very comfortable to ride in as well and enjoys the look. We both love it.



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All classified ads are subject to the applicable rate card, copies of which are available from our Advertising Dept. All ads are subject to approval before publication. Springfield News-Leader reserves the right to edit, refuse, reject, classify or cancel any ad at any time. Errors must be reported in the first day of publication. Springfield News-Leader shall not be liable for any loss or expense that results from an error in or omission of an advertisement. No refunds for early cancellation of order.

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shih tzu AKC registered champion bred shih tzu male puppies gold and white 3 months old $2500 or best offer halfwaytoheavenshihtzu.com Pat 417 467 2166 or 417 327 9570

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We are still putting songs in lots of peoples hearts
At this time, we have premium Havanese puppies for you.
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tenderlovingpuppies.com

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all kinds of things...

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All real estate advertised herein is subject to the Federal Fair Housing Act, which makes it illegal to advertise any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or intention to make any such preference, limitation, or discrimination. "We will not knowingly accept any advertising for real estate which is in violation of the law. All persons are hereby informed that all dwellings advertised are available on an equal opportunity basis.

EQUAL HOUSING OPPORTUNITY

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250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

Bids & Proposals

Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

Notice To Creditors

Notice to Creditors
All persons interested in the estate of Harry McDaniel, decedent. The undersigned Janet A Davis is acting as trustee under a trust, the terms of which provide that the debts of the decedent may be paid by the trustee upon receipt of proper proof thereof. The address of the trustee is 1522 S. Briar Ave Springfield MO 65809. All creditors of the decedent are noticed to present their claims to the undersigned within six (6) months from the date of 1st publication or be forever barred. Janet A Davis
May 8, 15, 22, 29 2025
LCLM0291725

Bids & Proposals

Crossland Construction Company is accepting bids for Dadeville Schools, located at 17 Bearcat Trail Dadeville, MO, 65635. A complete scope of work and bid package/bid form can be obtained through the contacts listed below. Potential subcontractors must meet Crossland's qualification requirements (insurance, safety policies, bonding, etc). If you are interested in bidding on this project, please contact Ernie Perkins or Jeff Groven at bid@crossland.com. Main office phone is 417-368-3957.

Govt Bids & Proposals

Notice of Public Hearing:

A public hearing with planning and zoning will be held on Tuesday, June10th, at 6:00 pm at Rogersville City Hall. This hearing will be held to discuss:

A Planned Community development along S Farm Rd 249.

Any interested citizens are encouraged to attend the hearing. For more information, please contact City Administrator, Chad Bybee at 417-753-2884 x 313.

Public Notices

Downtown Springfield Community Improvement District
Annual Meeting Notice

May 14, 2025, Wednesday
8:00 am
Councilman Denny Whayne Conference Room
Busch Building 4th Floor
840 Boonville
Springfield, MO 65802

2025-2026 Budget, Committee updates on past and future projects.
For Information contact:
Nicole Brown,
Secretary/Treasurer
Downtown Springfield Community Improvement District,
650 N. Boonville Ste. 100,
Springfield, MO 65806 or
417-812-6101

Bids for M.S.H.P. Troop E Headquarters-Renovate Exterior, Headquarters Building, Project No. R2335-01 will be received by FMDC, State of MO, UNTIL 1:30 PM, June 10, 2025. Project information available at:
http://oa.mo.gov/facilities

Bids & Proposals

Govt Bids & Proposals

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Throughout the ages, there have been significant advancements in mobility aids. From canes to walkers, rollators, and scooters, these devices were created to help those with mobility issues maintain their independence. However, there haven't been any truly revolutionary new products in this field until now. Until now, that is, because a team of engineers has developed something that's set to change the game. They've created the world's lightest wheelchair, weighing only 13.5 lbs, a personal mobility solution that's been called a game-changer. It's called the **Featherweight Wheelchair**, and there is nothing out there quite like it.

The first thing you'll notice about the **Featherweight Wheelchair** is how light it is! This is the world's lightest wheelchair at 13.5lbs, making it possible for anyone to lift into a vehicle. It's modern design and custom color options make it very lightweight, durable, and great to look at.



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01/09/25

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April 22, 2025

Kim Ridgeway
Russell Johns Associates LLC

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

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The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

May 8, 2025

Affidavit of Publication

To Whom It May Concern:
I am a duly authorized representative of MCA Russell Johns Associates LLC, the company handling the advertising matters for USA Today a daily newspaper distributed within the United States.

A public notice ad was placed by Region 8 Education Service Center (TIPS) (RFP No. 250501 250502 250503 250504) and was published in said newspaper within the marketplace section of the National USA Today Marketplace on May 1, 2025 and May 8, 2025.

Anthony Pacini

On this 8th day of May, I attest that the attached document is a true, exact, complete, and unaltered tearsheet.

Notary

ELISABETH KIDWELL
Notary Public - State of Florida
Commission # HH 517131
My Comm. Expires Apr 17, 2028
Bonded through National Notary Assn.

NFL POWER RANKINGS

Where do all 32 teams stand with draft complete?

Nate Davis
USA TODAY



Among the prominent players to watch in 2025 will be, from left, Patrick Mahomes, Travis Hunter and Aaron Rodgers.
ILLUSTRATION BY SPENCER HOLLADAY; PHOTOS BY IMAGN IMAGES AND GETTY IMAGES

NFL power rankings with the 2025 draft now complete (previous rank in parentheses):

1. Philadelphia Eagles (1): Even coming off a dominant Super Bowl triumph over an active dynasty, it very much feels like this team is positioned to achieve even more – which may be especially true given executive vice president/general manager Howie Roseman somehow winds up with a player like LB Jihaad Campbell joining the roster at the end of the draft's first round. Rich and richer, etc., etc.

2. Baltimore Ravens (3): Perhaps you don't love the choice of second-round OLB Mike Green philosophically – which is especially puzzling for an organization that now appears appropriately poised to part with K Justin Tucker after drafting a new one. Yet it's also hard to deny that a team that's gone 25-9 over the past two regular seasons seems to be picking up steam, especially given QB Lamar Jackson's amazing knack for continuous improvement.

3. Los Angeles Rams (4): Once and future kings? Three years removed from winning the Super Bowl, the new-look Rams were the only team to challenge Philly in the playoffs. Now they've swapped out WR Cooper Kupp for Davante Adams, added more fresh talent to the defense, and are set up to replace QB Matthew Stafford (if need be) with multiple first-round selections in 2026.

4. Kansas City Chiefs (5): Speaking of that aforementioned dynasty, if ever a perennial contender coming off a 17-3 season, its ninth straight division title and fifth Super Bowl berth in six seasons felt vulnerable ... well, maybe that notion has actually already passed? Whenever he's physically ready, first-round LT Josh Simmons seems capable of stabilizing QB Patrick Mahomes' blind side for a very long time. Mahomes' comfort level should be further improved by the return of WR Rashee Rice, even if he has to serve a suspension, from injury. The road to the AFC crown still very much runs through Arrowhead.

5. Buffalo Bills (2): This slightly subdued ranking is less a suggestion that they're dropping but more an acknowledgment that the other closely packed Super Bowl aspirants have improved more significantly – not to mention the likelihood that the AFC East probably won't be the cakewalk it's been in recent years. But we don't mind you passing on wide receivers in the draft, Brandon Beane.

6. Washington Commanders (6): A team that did a notably poor job of drafting prior to the arrival of GM Adam Peters and HC Dan Quinn in 2024 now seems to be steadily building a strong foundation, yet shouldn't need to be overly reliant on its latest crop of rookies in 2025.

7. Detroit Lions (7): Hard to argue with any draft that strongly resources the trenches. The biggest question in Motown remains how well the two-time defending NFC North champs transition to two new coordinators.

8. Green Bay Packers (8): As good as they were in 2024, the sum of the parts seemed greater than the whole in what was something of a mirrored outcome compared to the 2023 team. But the newest part, first-round WR Matthew Golden, and the apparent retention of another, Pro Bowl CB Jaire Alexander, could be signs that the "Go Pack Go" you heard throughout draft weekend could continue deep into the upcoming season.

9. Tampa Bay Buccaneers (9): They're quite obviously capable of running the NFC South for the foreseeable future. But do they have the juice to consistently make deep playoff runs, especially after picking another receiver (Emeka Egbuka) in the first round when difference-makers for the defensive front seven seemed readily available?

10. Houston Texans (18): Sure seems as if they'll need to mount an exceptional effort ... to *not* win the AFC South in 2025. That might explain some of their willingness to make so many fundamental changes to the offense, modifications surely aimed at much bigger objectives than obtaining another divisional crown.

11. Los Angeles Chargers (10): The 49ers reached the Super Bowl in their second season under Jim Harbaugh (of course, they also qualified for the conference championship round in their first). For the Bolts to match those 2013 Niners in Year 2, they'll need to leverage the advantage of their hefty continuity while hoping Harbs can help the roster's young core truly blossom.

12. Cincinnati Bengals (13): Their draft wasn't especially inspiring. But this club's primary obstacles still seem to be issues that must be solved from within – giving DE Trey Hendrickson the raise he deserves and avoiding another disastrous September start, problems that threaten to become disastrously intertwined.

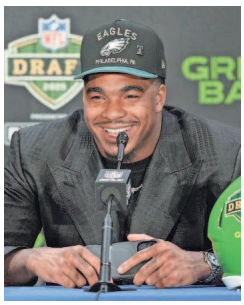
13. Denver Broncos (17): It's easy (and justifiable) to link their quick turnaround to HC Sean Payton and QB Bo Nix. It also seems a bit easy to lose sight of what an elite defense this could be, especially with the arrival of first-round DB Jahdae Barron.

14. San Francisco 49ers (11): We're eight seasons into the John Lynch-Kyle Shanahan regime – half ending outside the playoffs, the other half extending at least as far as the NFC title game. Despite a significant offseason recalibration, the Niners seem too good to miss the postseason again ... assuming they don't get swamped by another litany of injuries.

15. Seattle Seahawks (12): Speaking of recalibrating, they could have five new starters on offense, most notably QB Sam Darnold and Kupp. If first-year coordinator Klint Kubiak can balance the unit – meaning sustained emphasis on the run, which is what HC Mike Macdonald wants – feasible chance they don't wind up a tiebreaker shy of the playoffs again.

16. Pittsburgh Steelers (26): Despite an ongoing offseason of uncertainty, no one should suggest switching out Russell Wilson for Aaron Rodgers – assuming he ever signs a contract – is a lateral move at quarterback. Forward lateral? Maybe. But if the Steelers truly hope to punctuate another 9-8 season with a long-awaited postseason win, the most important components could be third-round RB Kaleb Johnson and a young offensive line that needs to fully coalesce.

17. Arizona Cardinals (15): A team that (quietly?) doubled its win total from four to eight in 2024 has basically left an 11th-ranked offense untouched while overhauling a 21st-ranked defense. What it means is TBD, though it would be easier to back the Cards as a dangerous 2025 dark horse if they weren't stuck in a division that's probably the league's roughest top to bottom.



Jihaad Campbell is the latest Georgia Bulldog drafted by the Super Bowl champion Eagles. KIRBY LEE/IMAGN IMAGES

18. Minnesota Vikings (14): Admittedly, they were devalued at this time a year ago – basically universally – given the unknown at quarterback. And while the totality of talent on the roster (and coaching staff) might be in sharper focus now, the unknown at quarterback remains.

19. Chicago Bears (16): Did you know they haven't won a playoff game in 14 years? Perhaps the organizational penchant for disarray quells what looks like a very good team on paper – for the second year in a row. But let's give highly recommended rookie HC Ben Johnson and his new staff a year to settle in before they're forced to prove these aren't the same old Bears.

20. New England Patriots (19): Whereas Johnson is an unproven commodity as a head coach, Mike Vrabel most certainly is not. Aside from his return to the sideline, the Pats' 22 starters in 2025 may look at least 50% different from last year's 4-13 edition. Don't be surprised if this is also a formula for the victory column to undergo a twofold upgrade.

21. Las Vegas Raiders (30): The marriage of an excellent draft headlined by RB Ashton Jeanty, a veteran infusion on defense, arrival of Geno Smith to settle the quarterback position and – perhaps most important – new head coach Pete Carroll's competitive culture should make the Silver and Black a far more competitive operation in 2025, if one that still has an uphill battle to escape last place in the AFC West.

22. Dallas Cowboys (20): Their draft was solidly promising – and Jerry Jones and Co. definitely seemed to follow the "best player available" axiom rather than drafting for need. That said, the Cowboys have more work to do on this roster heading into next season and could be a team especially focused on reeling in some of the more notable free agents who have taken their time picking new destinations.

23. Carolina Panthers (23): If QB Bryce Young can maintain his trend line from the second half of last season – eminently reasonable given his young weapons and HC Dave Canales – a defense that ranked dead last in 2024 may be the primary factor hindering this team from possibly contending within this division. However, getting DE Derrick Brown back from his knee injury could be a game changer ... literally.

24. Miami Dolphins (21): Gotta commend them for targeting big guys in the draft ... yet unclear if they targeted the optimal ones. The secondary still looms as a problematic issue, especially with the presumption CB Jalen Ramsey is on his way out of South Florida. It adds up to the daunting prospect of QB Tua Tagovailoa having to potentially drop back 40 times per game.

25. New York Jets (25): Clearly, the expectations in 2024 were too outsized (raises hand). Maybe the expectations in 2025 are too downsized (slowly raising hand?). But a largely measured approach to free agency and the draft signal an encouraging start for a new regime that seems fixated on keeping the main thing the main thing.

26. Jacksonville Jaguars (24): The arrival – at significant cost – of 2024 Heisman Trophy winner Travis Hunter could make them a curiosity they haven't been since joining the league 30 years ago. But rookie HC Liam Coen must do for QB Trevor Lawrence what he did for Baker Mayfield in Tampa if the Jags are to become legitimately relevant again.

27. Atlanta Falcons (22): Maybe they finally solved their years-long pass rush deficiencies. Maybe they paid way too exorbitantly to do it. Maybe this roster will just be hopelessly out of kilter as long as its backup quarterback is making nearly $30 million (or more) annually.

28. New York Giants (32): This draft will doubtless ultimately be defined by the success or failure of first-round QB Jaxson Dart. But it sure appears like a strong haul – even if the results aren't immediately apparent in the win column for the team with the league's toughest schedule (based on opponents' 2024 winning percentages) in 2025.

29. Cleveland Browns (27): Their surprising approach to the 2025 draft suggests they're far more focused on the 2026 draft – and consequently worth wondering how far Joe Flacco or Shedeur Sanders or Otto Graham could carry this offense as currently constructed.

30. Indianapolis Colts (28): The uncertainty at quarterback combined with the loss of two starting offensive linemen render this a worrisome situation. Should help on both fronts that first-round TE Tyler Warren landed in Indy's lap.

31. Tennessee Titans (31): History shows that a team drafting a quarterback No. 1 overall is going to struggle, though maybe it helps that Cam Ward won't be saddled with the same weighty expectations Caleb Williams carried last year in Chicago. Simply limiting the turnovers that so often put this defense in bad spots in 2024 would be a good start for Ward.

32. New Orleans Saints (29): The murky situation around Derek Carr's injured throwing shoulder significantly clouds the outlook of a team that will otherwise be at the mercy of a highly inexperienced group of quarterbacks ... even if second-rounder Tyler Shough, who's almost 26, just left college after seven years.

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Senators look into fans' streaming frustration

Chris Bumbaca
USA TODAY



Sen. Ted Cruz, R-Texas, is chairman of the Senate committee on Commerce, Science, and Transportation.
JACK GRUBER/USA TODAY NETWORK VIA IMAGN IMAGES

WASHINGTON – To watch live sports at home in 2025, between all of the apps and channels and streams that games air on thanks to billion-dollar rights deals, it can feel like being in a NASA control room.

Now Congress wants to be involved.

On May 6 on Capitol Hill, the Senate Commerce Committee – which has jurisdiction over the telecommunications that professional sports leagues use to broadcast games – interviewed representatives from the NBA, MLB and the NHL about sports' embrace of streaming, which creates a segmented market that is pricier for consumers.

"This is a growing problem," committee chairman Sen. Ted Cruz, R-Texas, said after the hearing. "Fans are understandably upset that it's really hard to watch your home team, figure out what app or what network, how to watch it. It's fractured right now. It's expensive right now."

Notably, the NFL did not attend the hearing despite Cruz's April 17 letter to Commissioner Roger Goodell requesting his or a league representative's presence. The NFL did not respond to a prior request from USA TODAY Sports for comment asking if the league intended to send a representative.

"I wish they had come," Cruz said. "I think the issues that were discussed apply to them just like they apply to the leagues that were here."

The main lines of questioning during the lightly attended meeting – nine of the 25 committee members showed up and most stayed for only brief periods – revolved around whether the leagues are not taking advantage of the antitrust legislation afforded to them through the Sports Broadcasting Act of 1961. The leagues said that because they can operate as one entity during media rights negotiations, they can pool resources to create a cheaper and more accessible model for fans.

John Bergmayer, the fourth witness and the legal director of the nonprofit group Public Knowledge, said fans feel like they finally broke free of the cable bundle only to watch it reform thanks to streaming platforms.

"Streaming is no longer an afterthought, and policymakers, content creators, tech platforms, and sports leagues need to take steps to ensure that shifts in the media, technology, and sports landscapes benefit viewers, and lead to cheaper and more convenient options," Bergmayer said during his opening statement.

The subject of local blackouts came up early, with MLB executive vice president of media and business development Kenny Gersh saying each club has the right to distribute on cable in its market and that 29 of the 30 clubs also have a direct-to-consumer (DTC) option for streamers. But the collapse of the Regional Sports Network (RSN) market has created an upheaval for leagues.

"As we continue to have flux in the system, we're going to have to continue to evaluate," NHL senior executive vice president of media and international strategy David Proper said.

Many of the Democratic senators, including ranking member Maria Cantwell, D-Washington, Ben Ray Lujan, D-New Mexico, and Ed Markey, D-Massachusetts, used their time to lambaste President Donald Trump's proposed cuts of National Public Radio and PBS.

Sen. Amy Klobuchar, D-Minnesota, explicitly asked NBA president of global content and media distribution Bill Koenig about the league's valuation of the WNBA in its media rights negotiations.

"We're mindful of the growing popularity of the WNBA," said Koenig, who added that the new media rights deals – valued at $76 billion – included upside provisions. For example, the revenue sharing that comes from advertising numbers stands to benefit the WNBA, he said.

Sen. Marsha Blackburn, R-Tennessee, used her five minutes to grill Koenig about the Daryl Morey "Hong Kong" freedom tweet from nearly six years ago and wanted to know what broadcast rights in China are worth. She also inquired about internet piracy and its impact on streaming.

Sen. Bernie Moreno, R-Ohio, encouraged the leagues to find solutions on their own rather than compelling Congress to be involved and regulate the leagues further, while Sen. Eric Schmitt, R-Missouri, relied on his experience of trying to stream St. Louis Cardinals games as an example of the plight fans go through to watch their teams.

"People do care about this a lot," Schmitt said.

Cantwell was interested in whether the leagues have specific data or metrics about fan complaints.

"It's certainly something we hear," Gersch said.

Cantwell floated a mandate for teams to make their games free in local markets backed by advertising revenue, a more traditional model. She doesn't want the simple act of watching a sporting event to be hijacked by a larger consumer experience like having to buy an annual subscription to a streaming service such as Prime Video or Peacock.

"There's just too much here where they can just think about the dollar instead of thinking about the true consumer experience," she said.

"In return for the very public benefits that teams and leagues receive," Bergmayer said, demonstrating the difference from other entertainment products, "there should be an obligation to make sure that games are widely accessible."

Cruz said the hearing was meant to be an informational, fact-finding exercise and he was pleased to that end.

A specific remedy, despite multiple legislative avenues, Cruz said, remains up in the air.

"It shouldn't be insanely complicated or insanely expensive to cheer on your hometown team," he said.

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Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Mobile and Self-Propelled Power Storage Equipment with Related Attachments to result in a procurement solution for use by its Participating Entities.

Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada.

A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal https://proportal.sourcewell-mn.gov

Only proposals submitted through the Sourcewell Procurement Portal will be considered.

Proposals are due no later than June 26, 2025, at 4:30 p.m. Central Time, and late proposals will not be considered.

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LEGAL NOTICES

IN THE UNITED STATES BANKRUPTCY COURT FOR THE DISTRICT OF DELAWARE

In re: DANIMER SCIENTIFIC, INC., *et al.*, Debtors.[1] | Chapter 11, Case No. 25 – 10518 (MFW) | (Jointly Administered)

NOTICE OF BAR DATES FOR FILING PROOFS OF CLAIM

TO ANY CREDITORS OF THE ABOVE-CAPTIONED ENTITIES (THE "*DEBTORS*"):

On May 5, 2025, the United States Bankruptcy Court for the District of Delaware (the "***Court***") entered an order (the "***Bar Date Order***") in the above-captioned chapter 11 cases (the "***Chapter 11 Cases***") establishing certain claims bar dates.[2]

THE BAR DATES. The Bar Date Order establishes the following bar dates for filing claims in these Chapter 11 Cases (collectively, the "***Bar Dates***"):

The General Bar Date. Pursuant to the Bar Date Order, except as described below, all entities holding claims, whether secured, unsecured priority (including Section 503(b)(9) Claims) or unsecured nonpriority, against the Debtors that arose prior to March 18, 2025 (the "***Petition Date***") must file proofs of claim by the General Bar Date (*i.e.*, by June 9, 2025 at 5:00 p.m., Eastern Time). With respect to Section 503(b)(9) Claims, the filing of a proof of claim shall be deemed to satisfy the procedural requirements for the assertion of such administrative claims.

The Governmental Bar Date. Pursuant to the Bar Date Order, except as described below, all governmental units holding claims against the Debtors (whether secured, unsecured priority or unsecured nonpriority) that arose before the Petition Date must file proofs of claim by the Governmental Bar Date (*i.e.*, by September 15, 2025 at 5:00 p.m., Eastern Time).

The Rejection Bar Date. Any entity whose claims arise out of the rejection of an executory contract or unexpired lease pursuant to a Court order (a "***Rejection Order***") or by operation of section 365(d)(4) of the Bankruptcy Code, including secured claims, unsecured priority claims and unsecured nonpriority claims that arose or are deemed to have arisen prior to the Petition Date, must file a proof of claim on or before the later of (a) the General Bar Date and (b) 5:00 p.m., Eastern Time, on the date that is 30 days after service of the Rejection Order.

The Amended Schedules Bar Date. If the Debtors amend or supplement their schedules of assets and liabilities (the "***Schedules***") to reduce the undisputed, non-contingent and liquidated amount of a claim against the Debtors, to change the nature or classification of a claim against the Debtors or to add a new claim to the Schedules, any affected entities that dispute such changes must file a proof of claim or amend any previously filed proof of claim in respect of the amended scheduled claim on or before the later of: (a) the General Bar Date; and (b) 5:00 p.m., Eastern Time, on the date that is 30 days after the date that notice of the applicable amendment to the Schedules is served on the entity.

FILING CLAIMS

1. **WHO MUST FILE.** Subject to the terms set forth in the Bar Date Order and described above for holders of claims subject to the Governmental Bar Date, Rejection Bar Date and the Amended Schedules Bar Date, the following entities must file proofs of claim on or before the General Bar Date:
(a) any entity (i) whose prepetition claim against the Debtors is not listed in the Debtors' Schedules or is listed as disputed, contingent or unliquidated and (ii) that desires to participate in these Chapter 11 Cases or share in any distributions in these Chapter 11 Cases; and
(b) any entity that believes that its prepetition claim is improperly classified in the Schedules or is listed in an incorrect amount and that desires to have its claim allowed in a classification or amount different from the classification or amount identified in the Schedules.

2. **WHAT TO FILE.** Parties asserting claims against the Debtors that arose before the Petition Date must use the copy of the proof of claim form (the "***Proof of Claim Form***") available on the Debtors' case website hosted by Stretto, Inc. ("***Stretto***") at https://cases.stretto.com/danimerscientific.

3. **WHEN AND WHERE TO FILE.** Entities must (i) deliver the Proof of Claim Form in person or by courier service, hand delivery or mail so it is received on or before the applicable Bar Date at the following address: Danimer Scientific, Inc., et al. Claims Processing, c/o Stretto, 410 Exchange, Suite 100, Irvine, CA 92602, or (ii) deliver it electronically using the interface available on Stretto's website at https://cases.stretto.com/danimerscientific on or before the applicable Bar Date.

Forms will be deemed filed when actually received by the Debtors' claims agent, Stretto. ***Forms may not be delivered via facsimile or electronic mail transmission.*** Any facsimile or electronic mail submissions will not be accepted and will not be deemed filed until a claim is submitted by one of the methods described above.

Forms will be collected, docketed and maintained by Stretto. If you want to receive acknowledgment of Stretto's receipt of a form, you must submit by the applicable Bar Dates and concurrently with submitting your original form (a) a copy of the original form and (b) a self-addressed, postage prepaid return envelope. Additionally, if you submit a Proof of Claim Form through Stretto's website interface, you will receive an email confirmation of your submission.

All forms must be signed by the claimant or, if the claimant is not an individual, by an authorized agent of the claimant. The form must be written in English, be denominated in United States currency and conform substantially with the Proof of Claim form. The Proof of Claim Form must set forth with specificity the legal and factual basis for the alleged claim. You must attach to your completed form any documents on which the claim is based (or, if such documents are voluminous, attach a summary) or an explanation as to why the documents are not available.

Any entity asserting claims against multiple Debtors must file a separate form with respect to each Debtor. In addition, any entity filing a claim must identify on its form the particular Debtor against which the entity asserts its claim. Any claim filed under the joint administration case, Danimer Scientific, Inc., Case No. 25-10518 (MFW), or that otherwise fails to identify a Debtor shall be deemed as filed only against Debtor Danimer Scientific, Inc.. If an entity lists more than one Debtor on any one form, the relevant claims shall be treated as filed only against the first listed Debtor.

CONSEQUENCES OF FAILURE TO FILE A CLAIM. Any entity that is required to file a Proof of Claim Form pursuant to the Bar Date Order, but fails to properly do so by the applicable Bar Date, shall not be treated as a creditor or claimant (as applicable) with respect to such claim for the purposes of voting and distribution in the above-captioned cases and shall be forever barred, estopped and enjoined from asserting any such claim against the Debtors or their estates or property.

ADDITIONAL INFORMATION. If you require additional information, you may contact Stretto (i) by telephone at (855) 469-1505 (toll-free) or 1-657-232-7988 (international), (ii) by email at teamdanimerscientific@stretto.com, or (iii) by submitting an inquiry on Stretto's website at https://cases.stretto.com/danimerscientific. Copies of the Bar Date Order and other information regarding the Debtors' Chapter 11 Cases are available for inspection free of charge on Stretto's website at https://cases.stretto.com/danimerscientific.

A HOLDER OF A POSSIBLE CLAIM AGAINST THE DEBTORS SHOULD CONSULT AN ATTORNEY REGARDING ANY MATTERS NOT COVERED BY THIS NOTICE, INCLUDING WHETHER THE HOLDER SHOULD FILE A PROOF OF CLAIM FORM.

The Debtors in these Chapter 11 Cases and the last four digits of their respective federal tax identification numbers are: Danimer Scientific, Inc. (4518); Danimer Bioplastics, Inc. (0734); Danimer Scientific Holdings, LLC (0521); Danimer Scientific Kentucky, Inc. (6771); Danimer Scientific Manufacturing, Inc. (0122); Danimer Scientific, L.L.C. (7346); Meredian Bioplastics, Inc. (5822); Meredian Holdings Group, Inc. (7239); Meredian, Inc. (7507); and Novomer, Inc. (4173). The location of the Debtors' corporate headquarters is: 140 Industrial Boulevard, Bainbridge, Georgia, 39817.

[2] Capitalized terms not otherwise defined herein shall have the meanings given to them in the Bar Date Order.

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This announcement is neither an offer to purchase nor a solicitation of an offer to sell Shares (as defined below). The Offer (as defined below) is made solely by the Offer to Purchase, dated May 5, 2025, and the related Letter of Transmittal, and any amendments thereto, and is being made to all holders of Shares. Purchaser (as defined below) is not aware of any state where the making of the Offer is prohibited by administrative or judicial action pursuant to any valid state statute. If Purchaser becomes aware of any valid state statute prohibiting the making of the Offer, Purchaser will make a good faith effort to comply with such statute. If, after such good faith effort, Purchaser cannot comply with such state statute, the Offer will not be made to nor will tenders be accepted from or on behalf of the holders of Shares in such state. In any jurisdiction where securities, blue sky or other laws require that the Offer be made by a licensed broker or dealer, the Offer shall be deemed to be made on behalf of Purchaser by one or more registered brokers or dealers licensed under the laws of such jurisdiction.

Notice of Offer to Purchase for Cash Up to 4,000,000 Shares of Common Stock of AT&T INC. at $26.38 Net Per Share by TRC CAPITAL INVESTMENT CORPORATION

TRC Capital Investment Corporation, a corporation under the laws of the Province of Ontario, Canada ("Purchaser"), is offering to purchase up to 4,000,000 shares of common stock, $1.00 par value per share (the "Shares"), of AT&T Inc., a Delaware corporation (the "Company"), at $26.38 per share, net to the seller in cash, upon the terms and subject to the conditions set forth in the Offer to Purchase, dated May 5, 2025, and in the related Letter of Transmittal (the "Offer"). The offer is not conditioned upon the tender of any minimum number of Shares.

THE OFFER, PRORATION PERIOD AND WITHDRAWAL RIGHTS WILL EXPIRE AT ONE MINUTE AFTER 11:59 P.M., NEW YORK CITY TIME, ON JUNE 3, 2025, UNLESS THE OFFER IS EXTENDED OR EARLIER TERMINATED.

Shares tendered pursuant to the Offer may be withdrawn at any time prior to one minute after 11:59 p.m., New York City time, on June 16, 2025, (the "Expiration Date") unless the Offer is extended, and, if not yet accepted for payment by the Purchaser, may also be withdrawn after June 16, 2025. If more than 4,000,000 Shares are validly tendered prior to the Expiration Date and not properly withdrawn, the Purchaser will, upon the terms and subject to the conditions of the Offer, accept for payment and pay for only 4,000,000 Shares on a pro rata basis, with adjustments to avoid purchases of fractional Shares. The information required to be disclosed pursuant to the Securities Exchange Act of 1934, as amended, is contained in the Offer to Purchase and is incorporated herein by reference. The Offer to Purchase and the related Letter of Transmittal and other relevant materials will be mailed upon request to record holders of Shares and furnished to brokers, dealers, banks, trust companies and similar persons whose names, or the names of whose nominees, appear on the Company's shareholder list or, if applicable, who are listed as participants in a clearing agency's security position listing, for subsequent transmittal to beneficial owners of Shares. The Offer to Purchase and Letter of Transmittal contain important information which should be read before any decision is made with respect to the Offer. Requests for copies of the Offer to Purchase, the Letter of Transmittal and all other tender offer materials may be directed to the Information Agent, as set forth below, and copies will be furnished promptly. Questions or requests for assistance may be directed to the Information Agent. The Information Agent for the Offer is: CNRA FINANCIAL SERVICES INC. 101 St. Clair Avenue West, Suite 1908, Toronto, Canada M4V 0A2. Call: (416) 861-9466.

May 5, 2025

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477• tips@tips-usa.com

April 22, 2025

Daily Journal of Commerce, Inc.
Attn: Michelle Ropp

Please print the following **LEGAL NOTICE: Friday, May 2, 2025, AND Friday, May 9, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.

Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com
brooke.scott@tips-usa.com
903-575-2608

Daily Journal of Commerce
1618 SW First Ave., Suite 400
Portland, OR, 97201
Phone: 503-226-1311 Fax: 503-222-5358

DJC OREGON

Affidavit of Publication

To: The Interlocal Purchasing System Tips - Brooke Scott
4845 US Hwy 271 N
Pittsburg, TX, 756864303

Re: Legal Notice 4052695, PROCUREMENT SOLICITATIONS

State of OR }
} SS:
County of Multnomah }

I, Michelle A. Ropp, being duly sworn, depose and say that I am the Principal Clerk of the Daily Journal of Commerce, a newspaper of general circulation in the counties of CLACKAMAS, MULTNOMAH, and WASHINGTON as defined by ORS 193.101 and 193.020, published in Portland in the aforesaid County and State; that I know from my personal knowledge that the notice described as:
PROCUREMENT SOLICITATIONS
The Interlocal Purchasing System
a printed copy of which is hereto annexed, was published in the entire issue of said newspaper 2 time(s) in the following issues:
05/02/2025 and 05/09/2025.

SEE EXHIBIT A

State of Oregon
County of Multnomah

SIGNED OR ATTESTED BEFORE ME ON 12th day of May 2025

By: Michelle A Ropp
Michelle A. Ropp

By: Nicholas Bjork
OFFICIAL STAMP
NICHOLAS BJORK
NOTARY PUBLIC - OREGON
COMMISSION NO. 1044188
MY COMMISSION EXPIRES JANUARY 10, 2028

Nicholas Bjork
Notary Public, State of OR
No. 1044188
My commission expires on January 10, 2028

· Perform traffic counting and intersection evaluations.

AREA 6: LAND SURVEYING

· Prepare topographic, boundary, and control surveys;

· Provide construction staking;

· Assist with monument preservation and restoration (including locating, referencing, installing monuments);

· Prepare survey maps and records including topographic, record-of-survey, right-of-way, survey control, and LCR's;

· Provide all field notes, records, adjustment data, and both raw and final measurements and coordinates; and

· Have knowledge of Washington State Plane Coordinate System and coordinate transformation techniques and parameters.

AREA 7: PAVEMENT PRESERVATION

· Provide PAVER software technical support and advanced training;

· Prepare pavement designs and recommendations, including analyzing traffic loads over a 20+-year design life;

· Analyze Portland Cement (PCC) roadway designs and make recommendations;

· Diagnose unique pavement distresses and provide design recommendations;

· Provide analysis of county-performed structural testing results with an FWD (falling weight deflectometer) and provide recommendations;

· Make visual inspections of pavements;

· Assist in developing a quality control program to monitor performance of surface treatments; and

· Analyze ground-penetrating radar reports for pavement treatments or design.

AREA 8: PARKS AND RECREATION MASTER PLANNING AND LANDSCAPE DESIGN

· Prepare conceptual, preliminary, and final landscape designs and planting plans;

· Design neighborhood, community, and regional parks, including play structures, pedestrian facilities, parking, restroom facilities, etc.;

· Develop interpretive signage;

· Design irrigation systems;

· Plan and design trails and open spaces;

· Plan and design sports and other special facilities;

· Evaluate parks and recreation-related buildings and structures;

· Prepare comprehensive park, recreation and natural resource plans;

· Prepare bicycle and pedestrian master plans; and

· Coordinate and facilitate public involvement.

AREA 9: STREAM HYDRAULICS, RESTORATION AND FISH HABITAT ENHANCEMENT

· Evaluate fluvial geomorphology;

· Assess habitat (riparian, wetland, and in-stream);

· Provide stream reconnaissance;

· Perform hydrologic, hydraulic and water quality modeling, design of stormwater facilities, stream reach and sub-basin analysis; stream stabilization design;

· Provide hydraulic analysis, engineering review and permitting support for Clark County's Flood Hazard Areas Ordinance and National Flood Insurance Program requirements using a certified floodplain manager;

· Stream corridor design, which may include streambed and bank protection or stabilization, calculate shear stresses and scour, develop streambed stone gradations, scour countermeasure, and stream grading;

· Design aquatic habitat;

· Provide bank stabilization and bioengineering designs;

· Design, support construction and monitor fish passage projects; and

· Perform cost-benefit analysis for habitat restoration projects.

AREA 10: ENVIRONMENTAL DOCUMENTATION AND PERMITTING

· Provide environmental documentation and permitting support for project

managers/coordinators. Advise managers and coordinators of environmental documentation and permitting requirements for projects;

· Develop permit application narratives, documents and exhibits; meet with agency personnel, property owners, and other consultants as required in obtaining permits;

· Conduct wetland delineations, critical/sensitive area assessments, and rare plant surveys;

· Ensure NEPA and SEPA procedures are followed during planning and designing phase of projects; develop NEPA and SEPA documents that are appropriately sized to the project impacts;

· Conduct Biological Assessments, Phase I and Phase II Environmental Site Assessments (Hazardous Waste), noise assessments, air quality analysis (i.e. project level conformity, hotspot analysis) and other specialized environmental discipline reports as necessary for NEPA procedures;

· Develop mitigation plans using Washington Department of Ecology (Ecology), US Army Corps (USACE), Washington Department of Fish and Wildlife (WDFW), and Clark County Community Development guidelines, along with developing planting plans for wetland and habitat mitigation;

· Prepare JARPA packages for permit application submittals to Ecology, USACE, WDFW, and Clark County Community Development;

· Develop permit application submittals and narratives to comply with county Wetlands and Fish and Wildlife Habitat Conservation Areas and Shoreline Master Program (Titles 40.445 and 40.460).

AREA 11: ARCHAEOLOGICAL/CULTURAL RESOURCES

· Perform Clark County Archaeological Predeterminations;

· Perform Cultural Resource Surveys;

· Perform Historic Property Surveys;

· Provide Archaeological Monitoring;

· Prepare Inadvertent Discovery Plans;

· Have knowledge of WSDOT and DAHP standards, Section 106 of National Historic Preservation Act, Washington State Executive Order 21-02, and Section 4(f) of the Transportation Act;

· Meet the minimum professional qualifications as defined by the Professional Qualifications Standards from the Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation (CFR 36 Part 61); and

· Obtain Excavation Permits from DAHP or other agencies.

AREA 12: RAILROAD ENGINEERING AND ON-TRACK SAFETY

· Prepare plans, specifications and estimates for railroad repairs;

· Provide inspection and construction management for railroad projects;

· Respond to derailment, track damage and other incidents;

· Coordinate with the FRA and the WUTC;

· Provide on-track safety services including training county employees;

· Inspect tracks, bridges, and grade crossings;

· Update safety crossing database;

· Review crossing permits; and

· Update track charts.

AREA 13: FORESTRY ENGINEERINGAND ARBORICULTURE CONSULTING

· Conduct Unit Layout & Mapping.

· Conduct Timber Cruising.

· Conduct Stocking Inventories.

· Conduct Riparian Buffer Layout.

· Supervise Logging Contracts.

· Provide Sustainable Forest Land Management Planning.

· Provide support for Urban Forestry Planning and Permitting.

· Assist with Forest Practice Permitting

· Provide certified arborist services, including tree health and survival evaluations, Tree Protection Plan preparation, and construction monitoring.

Evaluation of Applicant Qualifications

Submitted SOQ materials may be used to evaluate a firm's capabilities for upcoming county project work (less than $200,000). Selection of firms for project work may include a review of:

· key personnel

· firm experience within specific technical area

· responsiveness and ability to meet schedule

· familiarity with local, state and federal standards

· availability to respond to physical job sites in Clark County

SOQ materials may be used to develop a short list of qualified firms followed by an interview process for selection of the most qualified firm. When deemed necessary by the County, more project detail will be provided to applicants prior to any interview process. Submitted SOQs will not be used in evaluations for projects where the estimated cost is above $200,000. Projects where the estimated work exceeds $200,000 will be advertised as a separate Request for Proposal.

Schedule

· Issue 2025 Request for Qualifications May 1, 2025

· SOQs Due (County to begin use for selection in project work) June 15, 2025

Published May 2, 5, 7, 9, 12, 14, 16, 19, 21, 23, 28, 30; Jun. 2, 4, 6, 9, 11 & 13, 2025.

4053258

MEDFORD WATER COMMISSION

WATER MANAGEMENT & CONSERVATION PLAN
Bids Due 2:00 pm, June 11, 2025
REQUEST FOR PROPOSALS

Notice is hereby given that Medford Water Commission (Medford Water), by and through its Board of Water Commissioners, will receive proposals until 2:00 p.m., Local Time, Wednesday, June 11, 2025 for the following services:

WATER MANAGEMENT & CONSERVATION PLAN (WMCP) AND CONSOLIDATED WATER SYSTEM MASTER PLAN CONSULTING SERVICES

This solicitation and selection will be conducted using the Qualification Based Selection (QBS) process. Proposals packages received after the time established for receiving proposals will not be considered. Facsimile packages are not acceptable. All proposals shall be submitted as set forth in the Proposal Instructions and must contain a signed Proposal Submission Form. Medford Water is not responsible for proposals presented in any manner, format or to any delivery point other than as required by the Request for Proposals (RFP) Document.

NOTE: RFP Documents will be available electronically for download at http://www.medfordwater.org at no charge on the date specified in "Section II - Schedule" of this RFP. On the homepage under the "Doing Business" dropdown, select "Bids, RFPs and RFQ's". Find the RFP titled **"WATER MANAGEMENT & CONSERVATION PLAN (WMCP) AND CONSOLIDATED WATER SYSTEM MASTER PLAN CONSULTING SERVICES",** then select 'Click here for documents' in the Plans row. Contact Mark Depner, Purchasing & Contract Administrator at mark.depner@medfordwater.org or (541) 774-2459 to register and obtain the login password. Printed RFP documents will not be mailed by Medford Water. Respondents should check the website regularly until the RFP due date and time to avoid missing any addenda, which will only be available online. Respondents who obtain their RFP documents only from plan centers, or by means other than the Medford Water website, are responsible for ensuring they have all addenda; they will not be registered or appear on the list of plan-holders and will not receive notifications from Medford Water regarding this RFP.

A voluntary pre-proposal conference for all firms interested in submitting a proposal will be held at 11:00 a.m., Tuesday, May 13, 2025, through a Microsoft Teams meeting. This meeting may be used to provide additional information and to answer questions about the required services, Medford Water expectations, and the evaluation process. Statements made by Medford Water's representatives at the meeting are not binding upon Medford Water unless confirmed by Written Addendum; any change to, or interpretation of, the RFP document by Medford Water shall be accomplished by Written Addendum.

https://teams.microsoft.com
Teams Meeting ID: 218 088 464 576 9 Passcode: 2yk3ug9L
or dial in by phone: (971)337-2445 / phone conference ID: 322052558#

The single point of contact for questions regarding the RFP, proposal process, clarification, award process, protests, or any other issues that arise, is Brian Runyen, Engineering Manager at (541) 774- 2428 or brian.runyen@medfordwater.org.

Each proposer must sign and submit the Proposal Submission Form which contains a statement as to whether the proposer is a resident, as defined in ORS 279A.120. Proposers will be selected to provide services based upon proposals evaluation; Medford Water does not guarantee any amount of work as a result of this RFP. Medford Water reserves the right to reject any or all Proposals and to waive irregularities or informalities in a proposal or in the opening and may cancel the procurement in accordance with ORS 279B.100. A sample contract is included as Exhibit A; award of the contract will be subject to approval of the Board of Water Commissioners.

Dated this 1st day of May, 2025.

BOARD OF WATER COMMISSIONERS
CITY OF MEDFORD, OREGON
Brad Taylor, General Manager

Published May 2, 2025. 4053400

CITY OF Vancouver WASHINGTON

COMMISSIONING SERVICES FOR THE VANCOUVER PUBLIC WORKS OPERATIONS CAMPUS
Qualifications Due 3:00 pm, June 4, 2025
REQUEST FOR QUALIFICATIONS
RFQ# 35-25

Notice is hereby given that the City of Vancouver, Washington, will receive sealed responses up to the hour of **3:00 p.m., Pacific Local Time, June 4, 2025**, for the following:

The City of Vancouver is seeking statements of qualifications from qualified firms/individuals for commissioning firms to perform commissioning services for the City of Vancouver Public Works Operations Center located at 8713 NE 94th Ave Vancouver, WA 98662.

The City of Vancouver in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252,42 U.S.C. 2000d to 2000d-4) and the Regulations, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

The City of Vancouver is committed to providing equal opportunities to State of Washington certified Minority, Disadvantaged and Women's Business Enterprises in contracting activities. (Section 4 of Chapter 56, Laws of 1975, 1st Ex. Sess., State of Washington).

RFQ documents may be obtained from the City of Vancouver Procurement Services website at: https://cityofvancouver.bonfirehub.com. These are available for viewing, downloading and printing on your own equipment, free of charge.

Published May 2, 2025. 4053264

NIXYAAWII COMMUNITY FINANCIAL SERVICES

NCFS FOOD TRUCK PARK DEVELOPMENT
INVITATION TO BID

General Contractor Services: "NCFS Food Truck Park Development" for Nixyaawii Community Financial Services (NCFS) in Mission, OR. Due Date: 04/22/2025. Intent to Award: 04/24/2025. Notice To Proceed: 05/02/2025 Issuing Agency: Nixyaawii Community Financial Services NCFS intends in proceeding with a contract with Bryson Picard Grading & Excavating, LLC; 47559 Short Mile Road, Pendleton, OR 97801. Please direct any questions regarding this notice to Shandiin Yessilth, Wenaha Group, ShandiinY@wenahagroup.com.

Published May 2, 2025. 4053266

REDMOND SCHOOL DISTRICT

ANNOUNCEMENT OF REQUEST FOR QUALIFICATIONS
ADDENDA

The Redmond School District Request for Qualifications issued on April 25, 2025 is issuing an addendum in response to questions for clarification, it will be released on May 2, 2025.

The Redmond School District Wide Commission RFQ Addendum 1 will be available for download at http://hmkco.org/bid-documents/.

Please check for potential further addenda on May 8, 2025.

Published May 2, 2025. 4053387

SWEET HOME SCHOOL DISTRICT

LONG-RANGE FACILITY PLAN
Proposals Due 3:00 pm, May 27, 2025
REQUEST FOR PROPOSALS

The Sweet Home School District is seeking proposals from qualified firms to provide the district with a facilities assessment on six schools and assist in the development of a Long-Range Facility Plan.

Proposals will be accepted until May 27, 2025 at 3 p.m. Project work shall be completed by 10/31/25. A copy of the RFP may be obtained from district's website at www.sweethome.k12.or.us/business/

Published May 2, 2025. 4053289

THE INTERLOCAL PURCHASING SYSTEM

PROCUREMENT SOLICITATIONS
Proposals due June 20, 2025 at 3:00 pm
REQUEST FOR PROPOSALS

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

250502 Elevators and Servicing (2 Part with JOC)

250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services

250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Published May 2 & 9, 2025.

4052695

END OF FIRST TIME PUBLISHED

CONSTRUCTION

CLACKAMAS RIVER WATER

TAYLOR TERRACE PAVING
Bids Due 2:00 pm, May 13, 2025
INVITATION TO BID
PROJECT 22-2315

Sealed bids marked **"Taylor Terrace Paving"** will be received by Karin Holzgang, Contracts Coordinator, at the Clackamas River Water Office, located at 16770 SE 82nd Drive, Clackamas, Oregon 97015. Bids must be received at the location noted above no later than **2:00 PM** Pacific Time on **Tuesday, May 13th, 2025**, at which time the bids will be publicly opened and read. There will be a remote option for the bid opening. Remote access information will be posted on the CRW website at https://crwater.com/contracting-opportunities/ at least seven days prior to the bid opening. All Bidders must submit a list of their first-tier subcontractors, as required by ORS 279C.370, in a separate envelope no later than 4:00 PM Pacific time that same day. Any and all bids received after the deadline for submission, or for which the list of first-tier subcontractors has not been submitted by the deadline for disclosure of first-tier subcontractors, shall be declared "non-responsive" and shall not be considered for award. A contract will be awarded or bids rejected within 30 calendar days after the opening.

Bid Opening

1. Bids will be opened by CRW staff in the CRW Board Room at the date and time stipulated above.

2. The bid opening may be attended in person in the Board Room or viewed by Zoom meeting. Information on connecting to the Zoom meeting will be found on the CRW website at https://crwater.com/contracting-opportunities/ at least seven days prior to the bid opening.

3. Bid results will be available on the CRW website at https://crwater.com/contracting-opportunities/.

of the discipline area should be emphasized.

4. Respondent's Capabilities - Provide information on projects the firm or team members have worked on that demonstrate the firm's capabilities.

5. Resumes - Resumes for key staff members may be included.

6. Page Limit - Statements of qualification for each discipline area should number no more than ten (10) pages, excluding cover sheet and resumes.

7. All SOQs should be in .pdf format.

Request for Qualifications - Clark County, Washington

Below are the discipline areas for which SOQs are being solicited, as well as examples of the manner of service that may be requested in each discipline area.

AREA 1: CIVIL DESIGN

· Prepare alternative analyses, plans, specifications and cost estimates;

· Provide utility coordination, QA/QC, peer review and value engineering;

· Support construction with site visits and review of submittals;

· Provide Project Management support; and

· Assist with preparation of grants and coordination with granting agencies.

AREA 2: CONSTRUCTION MANAGEMENT

· Manage the advertisement, bid and award of capital and preservation construction projects;

· Oversee contractor operations for compliance with contract, plans, specifications and related documents;

· Manage change conditions, claims and protests including documentation and agency response;

· Prepare payments to contractors;

· Maintain documentation to local, state and federal standards;

· Coordinate utilities; and

· Review and recommend changes to design plans and specifications to address constructability, staging, access, etc.

AREA 3: STRUCTURAL ENGINEERING

· Prepare Type, Size and Location (TS&L) documents as required by WSDOT Highways and Local Programs;

· Provide load rating analysis (including over size and overweight loads);

· Develop designs for bridges, culverts, headwalls, inlet structures, rail retrofits, retaining walls, and sound walls;

· Make seismic analysis of existing structures and design of retrofits;

· Understand and able to follow WSDOT, AASHTO, and FHWA design standards;

· Evaluate scour and design mitigation using HEC-18 and HEC-23;

· Have experience with in-service bridge inspection and WSDOT and FHWA documentation; and · Provide support for emergency response.

AREA 4: GEOTECHNICAL ENGINEERING

· Review existing information and maps to characterize soil conditions;

· Identify slope stability hazards and be able to measure and monitor slope stability and landslide movement;

· Prepare exploration plans, perform borings and samplings, acquire necessary permits, prepare and implement traffic control plans;

· Measure and monitor groundwater elevations;

· Provide groundwater analysis and modeling;

· Test soil samples for engineering properties;

· Prepare reports with findings, conclusions and recommendations;

· Complete geotechnical design for retaining walls, foundations, and trench shoring;

· Perform seismic risk analyses and analysis of subsidence due to construction;

· Evaluate geotechnical considerations for trenching, pipe-jacking, and micro-tunneling;

· Provide geotechnical design for full depth reclamation roadway projects;

· Provide bridge foundation design and substructure recommendations; and

· Provide bridge slope stability and scour analysis required information.

AREA 5: TRAFFIC ENGINEERING

· Provide traffic modeling and transportation planning;

· Prepare designs for signals and Intelligent Transportation Systems;

· Develop signing and striping plans;

· Provide detour plans and incident management;

· Design railroad crossings and railroad signals;

· Assist with neighborhood traffic management;

· Evaluate roadway and intersection safety;

· Provide circulation planning and roadway alignment studies;

· Evaluate transportation concurrency;

· Provide ESAL (Equivalent Single Axel Load) training;

· Develop ITS asset inventory and management;

· Provide grant scoping and cost estimates for roundabout and signalized intersections;

· Review and comment on geometric layouts of single and multi-lane roundabouts;

· Provide roundabout and signal intersection control evaluations; and

· Perform traffic counting and intersection evaluations.

AREA 6: LAND SURVEYING

· Prepare topographic, boundary, and control surveys;

· Provide construction staking;

· Assist with monument preservation and restoration (including locating, referencing, installing monuments);

· Prepare survey maps and records including topographic, record-of-survey, right-of-way, survey control, and LCR's;

· Provide all field notes, records, adjustment data, and both raw and final measurements and coordinates; and

· Have knowledge of Washington State Plane Coordinate System and coordinate transformation techniques and parameters.

AREA 7: PAVEMENT PRESERVATION

· Provide PAVER software technical support and advanced training;

· Prepare pavement designs and recommendations, including analyzing traffic loads over a 20+-year design life;

· Analyze Portland Cement (PCC) roadway designs and make recommendations;

· Diagnose unique pavement distresses and provide design recommendations;

· Provide analysis of county-performed structural testing results with an FWD (falling weight deflectometer) and provide recommendations;

· Make visual inspections of pavements;

· Assist in developing a quality control program to monitor performance of surface treatments; and

· Analyze ground-penetrating radar reports for pavement treatments or design.

AREA 8: PARKS AND RECREATION MASTER PLANNING AND LANDSCAPE DESIGN

· Prepare conceptual, preliminary, and final landscape designs and planting plans;

· Design neighborhood, community, and regional parks, including play structures, pedestrian facilities, parking, restroom facilities, etc.;

· Develop interpretive signage;

· Design irrigation systems;

· Plan and design trails and open spaces;

· Plan and design sports and other special facilities;

· Evaluate parks and recreation-related buildings and structures;

· Prepare comprehensive park, recreation and natural resource plans;

· Prepare bicycle and pedestrian master plans; and

· Coordinate and facilitate public involvement.

AREA 9: STREAM HYDRAULICS, RESTORATION AND FISH HABITAT ENHANCEMENT

· Evaluate fluvial geomorphology;

· Assess habitat (riparian, wetland, and in-stream);

· Provide stream reconnaissance;

· Perform hydrologic, hydraulic and water quality modeling, design of stormwater facilities, stream reach and sub-basin analysis; stream stabilization design;

· Provide hydraulic analysis, engineering review and permitting support for Clark County's Flood Hazard Areas Ordinance and National Flood Insurance Program requirements using a certified floodplain manager;

· Stream corridor design, which may include streambed and bank protection or stabilization, calculate shear stresses and scour, develop streambed stone gradations, scour countermeasure, and stream grading;

· Design aquatic habitat;

· Provide bank stabilization and bioengineering designs;

· Design, support construction and monitor fish passage projects; and

· Perform cost-benefit analysis for habitat restoration projects.

AREA 10: ENVIRONMENTAL DOCUMENTATION AND PERMITTING

· Provide environmental documentation and permitting support for project managers/coordinators. Advise managers and coordinators of environmental documentation and permitting requirements for projects;

· Develop permit application narratives, documents and exhibits; meet with agency personnel, property owners, and other consultants as required in obtaining permits;

· Conduct wetland delineations, critical/sensitive area assessments, and rare plant surveys;

· Ensure NEPA and SEPA procedures are followed during planning and designing phase of projects; develop NEPA and SEPA documents that are appropriately sized to the project impacts;

· Conduct Biological Assessments, Phase I and Phase II Environmental Site Assessments (Hazardous Waste), noise assessments, air quality analysis (i.e. project level conformity, hotspot analysis) and other specialized environmental discipline reports as necessary for NEPA procedures;

· Develop mitigation plans using Washington Department of Ecology (Ecology), US Army Corps (USACE), Washington Department of Fish and Wildlife (WDFW), and Clark County Community Development guidelines, along with developing planting plans for wetland and habitat mitigation;

· Prepare JARPA packages for permit application submittals to Ecology, USACE, WDFW, and Clark County Community Development;

· Develop permit application submittals and narratives to comply with county Wetlands and Fish and Wildlife Habitat Conservation Areas and Shoreline Master Program (Titles 40.445 and 40.460).

AREA 11: ARCHAEOLOGICAL/CULTURAL RESOURCES

· Perform Clark County Archaeological Predeterminations;

· Perform Cultural Resource Surveys;

· Perform Historic Property Surveys;

· Provide Archaeological Monitoring;

· Prepare Inadvertent Discovery Plans;

· Have knowledge of WSDOT and DAHP standards, Section 106 of National Historic Preservation Act, Washington State Executive Order 21-02, and Section 4(f) of the Transportation Act;

· Meet the minimum professional qualifications as defined by the Professional Qualifications Standards from the Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation (CFR 36 Part 61); and

· Obtain Excavation Permits from DAHP or other agencies.

AREA 12: RAILROAD ENGINEERING AND ON-TRACK SAFETY

· Prepare plans, specifications and estimates for railroad repairs;

· Provide inspection and construction management for railroad projects;

· Respond to derailment, track damage and other incidents;

· Coordinate with the FRA and the WUTC;

· Provide on-track safety services including training county employees;

· Inspect tracks, bridges, and grade crossings;

· Update safety crossing database;

· Review crossing permits; and

· Update track charts.

AREA 13: FORESTRY ENGINEERINGAND ARBORICULTURE CONSULTING

· Conduct Unit Layout & Mapping.

· Conduct Timber Cruising.

· Conduct Stocking Inventories.

· Conduct Riparian Buffer Layout.

· Supervise Logging Contracts.

· Provide Sustainable Forest Land Management Planning.

· Provide support for Urban Forestry Planning and Permitting.

· Assist with Forest Practice Permitting

· Provide certified arborist services, including tree health and survival evaluations, Tree Protection Plan preparation, and construction monitoring.

Evaluation of Applicant Qualifications

Submitted SOQ materials may be used to evaluate a firm's capabilities for upcoming county project work (less than $200,000). Selection of firms for project work may include a review of:

· key personnel

· firm experience within specific technical area

· responsiveness and ability to meet schedule

· familiarity with local, state and federal standards

· availability to respond to physical job sites in Clark County

SOQ materials may be used to develop a short list of qualified firms followed by an interview process for selection of the most qualified firm. When deemed necessary by the County, more project detail will be provided to applicants prior to any interview process. Submitted SOQs will not be used in evaluations for projects where the estimated cost is above $200,000. Projects where the estimated work exceeds $200,000 will be advertised as a separate Request for Proposal.

Schedule

· Issue 2025 Request for Qualifications May 1, 2025

· SOQs Due (County to begin use for selection in project work) ~~June 15, 2025~~

· ***Amended Due Date of June 17th, 2025, by 3:00 p.m.***

Published May 2, 5, 7, 9, 12, 14, 16, 19, 21, 23, 26, 28, 30; Jun. 2, 4, 6, 9, 11 & 13, 2025.

4053258

DESCHUTES COUNTY FACILITIES

A/E SERVICES DOWNTOWN CAMPUS PLAN
Proposals Due 2:00 pm, June 5th, 2025
REQUEST FOR PROPOSALS

Deschutes County requests proposals from qualified firms for design services to develop a campus plan for the Deschutes County Downtown Campus located in Bend, Oregon. The successful proposer will engage with campus stakeholders to develop goals and objectives for the downtown campus, provide case studies of relevant civic campuses, and develop a design framework for the campus. The final deliverable will be a single report that details future development opportunities, anticipates growth, and establishes a clear vision for the services provided on the campus with near-term, mid-term, and longterm plans with conceptual cost estimates.

There will be a MANDATORY Pre-Proposal Meeting on May 15th, 2025 at 11:00 a.m. in the DeArmond Room of the Deschutes Services Building located at 1300 NW Wall Street, Bend, OR 97703. This RFP is available electronically through Deschutes.org/rfps and future notices regarding this solicitation, including solicitation addendum/a, will be posted to the same website. Questions and inquiries should be directed to Eric Nielsen, Capital Improvement Manager, eric.nielsen@deschutes.org, 541-330-8252. Sealed proposals shall be received no later than 2:00 p.m., current local time, June 5th, 2025 at:

Mailing:
Deschutes County Facilities
ATTN: Eric Nielsen
P.O. Box 6005
Bend OR, 97708-6005

Physical Drop-Off Address:
Deschutes County Facilities
ATTN: Eric Nielsen
14 NW Kearney Avenue
Bend, OR, 97703

Deschutes County may reject any proposal not in compliance with prescribed procedures and requirements and may reject for good cause any and all proposals upon a finding that it is in the public interest to do so. Deschutes County is not responsible for any costs of any proposers incurred while submitting proposal; all proposers who respond to solicitations do so solely at their own expense.

Published May 7 & 9, 2025.

4054622

SKAMANIA COUNTY

BUNDLED BRIDGES PREVENTATIVE MAINTENANCE PROJECT
Bids Due 10:00 am, May 29, 2025
INVITATION TO BID
FEDERAL AID# BHOS-2030(011)
CRP #2024-02

Skamania County (COUNTY) is seeking qualifications from engineering consulting services to design and facilitate the resurface, repair of superstructure, and other methods of preventative maintenance on 104 Salmon Falls, 105 Hatchery, and 210 Moore bridges. Deliverables include:

Preliminary Engineering (PE):

· Permitting - environmental, archeological etc.

· Surveying, Right-of-Way / Easement research and needs determination

· Plans, Specifications, and Estimates (PS&E), stamped by professional engineer registered in the State of Washington

· Stamped Contract development including Special Provisions

The COUNTY may supplement the consultant agreement to include future phases (RW, CN) including:

Right-of-Way (RW) :

· If ROW is needed - Appraisals and Reviews, Acquisitions, Relocation and Property Management according to the Uniform Relocation Act and detailed in WSDOT's Right-of-Way Manual and Lag Manual.

Construction Phase (CN):

· Record of Materials, RAM reviews, Buy America, Build America Buy America, CMOs, etc.

· Construction inspection and oversight, project management assistance, closure etc.

The anticipated timeline for the project is from June 2025 through December 2028. The county needs to obligate the Construction Phase by August 2026. Additional information for this RFQ is available online at

Request for Qualifications ? Skamania County

https://www.skamaniacounty.org/departments-offices/public-works/request-for-qualifications

The contract type is **Local Agency Professional Service Negotiated Hourly Rate Consultant Agreement**.

The DBE goal for this project is 16%.

Submittals are due no later than 10:00 A.M. Thursday, May 29, 2025. Submittals will not be accepted after that time and date. Consultant qualifications requirements, special provisions, how the consultant submittals will be evaluated, and schedule for the procurement process are available at the agency's website link above. Any questions regarding this project should be directed to Sadi' Stouder-Pettenger at 509-427-3910 or sadi@co.skamania.wa.us.

"Skamania County, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252,42 U.S.C. 2000d to 2000d-4) and the Regulations, hereby notifies all bidders that will affirmatively ensure that any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

Skamania County in accordance with Section 504 of the Rehabilitation Act (Section 504) and the Americans with the Americans with Disabilities Act (ADA), commits to nondiscrimination on the basis of disability, in all of its programs and activities. This material can be made available in an alternate format by emailing Sadi' Stouder- Pettenger at sadi@co.skamania.wa.us or by calling 509.427.3910.

Published Apr. 25, 28, 30; May 2, 5, 7, 9, 12, 14, 16, 18, 21, 23 & 28.

4051381

THE INTERLOCAL PURCHASING SYSTEM

PROCUREMENT SOLICITATIONS
Proposals due June 20, 2025 at 3:00 pm
REQUEST FOR PROPOSALS

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

250502 Elevators and Servicing (2 Part with JOC)

250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services

250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Published May 2 & 9, 2025.

4052695

Glenn Hegar
Texas Comptroller of Public Accounts

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Electronic State Business Daily

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Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

Modify (solicitation-create?identification=250501.)

Cancel

Solicitation ID: 250501.
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:40 am
Class/Item Code:
25735-Disaster Survival Equipment, Kits, and Supplies; 99030-Disaster Relief Services; 99060-Disaster Site Clean-up and Recovery Services;

Solicitation Description:

This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

Attachments Internal Notes

Attachments Upload File

ESBD_414741_1745933953152_TXSMART BUY LINK.docx X

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Link Policy (https://comptroller.texas.gov/about/policies/links.php)
Search from the Texas State Library (https://www.tsl.texas.gov/trail/index.html)
Texas Homeland Security (https://www.dhs.gov/see-something-say-something/reporting/texas)
Public Information Act (https://comptroller.texas.gov/about/policies/open-records/public-information-act.php)
Texas Secretary of State (https://www.sos.state.tx.us/)
HB 855

Other State Sites

Texas.gov (https://texas.gov)
Texas Records and Information Locator(TRAIL) (https://www.tsl.state.tx.us/trail/)
State Link Policy (https://dir.texas.gov/resource-library-item/state-website-linking-privacy-policy)
Texas Veterans Portal (https://veterans.portal.texas.gov)

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Elevators and Servicing (2 Part with JOC)

Approve

Modify (solicitation-create?identification=250502)

Cancel

Solicitation ID: 250502
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:45 am
Class/Item Code:
29500-Elevators, Escalators, And Moving Walks (Building Type); 91013-Elevator Installation, Maintenance, Repair and Inspection Services;
Solicitation Description:
This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

Attachments Internal Notes

Attachments Upload File

ESBD_414743_1745934305308_TXSMART BUY LINK.docx X



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Texas Homeland Security (https://www.dhs.gov/see-something-say-something/reporting/texas)
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Texas Secretary of State (https://www.sos.state.tx.us/)
HB 855

Other State Sites

Texas.gov (https://texas.gov)
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Texas Veterans Portal (https://veterans.portal.texas.gov)

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Modify (solicitation-create?identification=250503)

Cancel

MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services

Solicitation ID: 250503
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:51 am
Class/Item Code:
95815-Building And Facilities Management Services; 91000-Building Maintenance, Installation And Repair Services; 98836-Grounds and Roadside Maintenance: Mowing, Edging, Plant, Not Tree Trimming, etc.;
Solicitation Description:

This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

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Texas Veterans Portal (https://veterans.portal.texas.gov)

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Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

Modify (solicitation-create?identification=250504)

Cancel

Solicitation ID: 250504
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:56 am
Class/Item Code:
90900-Building Construction Services, New (Incl. Maintenance And Repair Services); 91400-Construction Services, Trade (New Construction); 91200-Construction Services, General (Incl. Maintenance And Repair Services); 91300-Construction Services, Heavy (Incl. Maintenance And Repair Services); 91024-Fire And/Or Water Damage Restoration Services;
Solicitation Description:

This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

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Texas Veterans Portal (https://veterans.portal.texas.gov)

Supplier Participation

250502

Elevators and Servicing (2 PART with JOC)

Issue Date: 5/1/2025
Response Deadline: 6/20/2025 03:00 PM (CT)

Contact Information

Address: Region 8 Education Service Center
4845 US Highway 271 North
Pittsburg, TX 75686
Phone: +1 (866) 839-8477
Email: bids@tips-usa.com

Participation Summary

Supplier	Email Status	Response Status
(FSS) Foodservice Sustainability Solutions		No Response
11 Series Energy, Inc.		No Response
152nd LLC		No Response
1880 Hospitality		No Response
1st Fire Protection Services		No Response
21st Century General Supply		No Response
360 clean (burger board llc)		No Response
360TXC, LLC		No Response
369 Global LLC		No Response
3DCapture Services (JRC Repair Service, LLC)		No Response
3G CONTROLS INC (3G CONTROLS INC)		No Response
3Sintegration (3Sintegration, LLC)		No Response
4 Moore Construction Solutions		No Response
4T Partnership LLc		No Response

535 transport and services (535 transport and services)		No Response
5F Mechancial Group, Inc.		No Response
8/A Builders LLC		No Response
A and R Construction, LLC		No Response
A P Fire Protection (A P Fire Protection)		No Response
A&H Electric		No Response
A&S Air Conditioning LLC		No Response
A+ Floor Installers LLC		No Response
A-1 FIRE & SECURITY (Fire & Access Control Systems)		No Response
A-1 Refrigeration & A/C, LLC		No Response
A5NR General Construction LLC		Viewed
A6 Scientific Corp.		No Response
AAA Veteran Air, LLC.		No Response
A-Action Janitorial Service Inc.		No Response
AB Martin Services, Inc.		No Response
Abanty Systems LLC	Fail	No Response
Abanty Systems LLC (ENVIRONMENTAL MULTISERVICE CONTRACTING SOLUTIONS LLC)		No Response
ABM Building Services, Austin		No Response
ABM Commercial Flooring Inc. (ABM Commercial Flooring Inc.)		No Response
ABM Industry Groups, LLC (ABM Industries Incorporated)		No Response
A-Bridge LLC		No Response
Absolute Defense/Clear Defense		No Response
acity specialty product dba zep sales and service		No Response
Acme Soap Company (Acme Soap,INC.)		No Response
ACO Remodeling & Construction, Inc.		No Response
Action Electrical Services LLC (Action Electrical Services LLC)		No Response
ACTION Janitorial Paper safety (Action Chemical, Inc.)		No Response
Acumen Enterprises, Inc.		No Response
ADA Business Supplies Inc. (ADA Business Supplies Inc.)		No Response
Adapt (SpaceCo Business Solitions, Inc. DBA Adapt Global)		No Response
Adept Facilities & Design		No Response
Advance Electric Company Inc.		No Response

Advanced Blending, Inc. DBA: LAst Group Enterprises		No Response
Advanced Management Group, LLC		No Response
Advancia Technologies, LLC		No Response
Advantage Access and Mobility		No Response
Aerus Electrolux (PH Enterprises, LLC)		No Response
AFA Protective Systems, Inc.		No Response
AFD Services LLC (AFD Services LLC)		No Response
AHM Cleveland		No Response
Air Craft Mechanical		No Response
Air Filter Systems, Inc.		No Response
Air Systems AC LLC		No Response
Airco Mechanical		Viewed
AIRIFY, INC.		No Response
Alklean Industries, Inc (Alklean Industries, Inc)		No Response
ALL SOUTH SHORE MEDICAL SUPPLY INC		No Response
All Water Mechanical		No Response
All wired electrical services (All wired electrical services)		No Response
Allied Express Solutions		No Response
Allied Services Company (Allied Pressure Washing LLc)		No Response
Allied Universal Technology Services		No Response
All-Rite Doors & Hardware (All-Rite Installations, LLC)		No Response
Allstar Services Group, LLC (Allstar Services Group, LLC)		No Response
All-Type Vacuum & Janitorial Supply		No Response
AlmsTravel LLC (AlmsTravel LLC)		No Response
AMCorp, LLC (AMCorp, LLC)		No Response
America Cleaning Solutions, Inc.		No Response
American CMG Services	Fail	No Response
american pride paper and plastic (american pride paper and plastic)		No Response
AmeriTex Elevator Services		No Response
Ampere Networks (NiOTA iNC)		No Response
AMS of Texas, LLC (American Mechanical Services of Texas, LLC)		No Response
Amstar, Inc.		No Response

Anchor Supply (Anchor Group Collective LLC)	No Response
Andon Solutions LLC	No Response
Anointed Multi-Services (Anointed Multi-Services)	No Response
Anthony Bryant (Anthony Bryant)	No Response
AnyDesk Software (AnyDesk Software)	No Response
AO3 Solutions, LLC (AO3 Solutions, LLC)	No Response
AP Gulf States Inc. dba Adolfson and Peterson Construction	No Response
Apollo Mechanical Contractors dba Apollo Solutions Group (Apollo Sheet Metal, Inc)	No Response
Apollo Metro Solutions (Apollo Metro Solutions, Inc.)	No Response
Applied Climate Solutions	No Response
Aqua Clear Water Solutions LLC	No Response
Arkansas Elevator llc	Viewed
Arkansas Office Products, Inc	No Response
Arlos Group, LLC	No Response
Armstrong Plumbing Air Electric	No Response
Armstrong Relocation (Armstrong Moving Solutions, San Antonio, LLC)	No Response
Armstrong Repair Center, INC	No Response
Arribatel America, LLC (Arribatel America, LLC)	No Response
ARS Commercial Equiment (baker)	No Response
ARSS CONSTRUCTION SERVICES LLC	No Response
Arthur Rose LLC	No Response
Asay & Sons Commercial	No Response
ASC Environmental Services (ASC Environmental Services)	No Response
Ascendancy Services Group LLC	No Response
ASD Consultants, Inc. (ASD Consultants, Inc.)	No Response
ASE Construction, LLC	No Response
Ashcraft's Lock & Door Hardware Co. (Ashcraft's Lock & Door Hardware Co.)	No Response
Ashford Building Solutions LLC (Ashford Building Solutions LLC)	No Response
ASSETWORKS	No Response
ATIS Elevator Inspections LLC	No Response
Atlantic Construction Sales	No Response

Atlas Commercial Renovations (Mulhern Carper Enterprises, LLC)		Viewed
Atomatic Mechanical (Atomatic Mechanical)		No Response
Aurum Coast Distribution LLC		No Response
Avad, LLC		No Response
Avenues International Inc.		No Response
AVIATE ENTERPRISES, INC.		Viewed
Avid Products, Inc.		No Response
Avighna Business Advsiors LLC		No Response
AVLZ PROFESSIONAL SERVICES LLC		No Response
Av-Ology Inc.		No Response
AWB Consulting		No Response
Azteca Designs and Construction (AZTECA DESIGNS, INC)		No Response
Azteca Enterprises, LLC		No Response
B & S Hardware, Inc.		No Response
B&J electrical (B&J electrical)		No Response
B&M Construction, Inc.		No Response
B2Z Engineering		No Response
Baltimore-Washington Contracting, Inc.		No Response
BAM Flooring, Inc.		No Response
Banks Business Center		No Response
Banks Property Management, LLC		No Response
Barnette Consulting Group		No Response
Bassco Services Incorporated		No Response
Batteries Plus (B Garth Co)		No Response
Bawse Enterprises, LLC (Blafrican Bawse Enterprises, LLC)		No Response
Baxter (Western-BRW Paper Co., Inc)		No Response
Bayside Builders MI LLC		No Response
BBVA Compass		No Response
BCI Services, INC.		No Response
Bearacade® (National School Control Systems, LLC.)	Fail	No Response
Beckwith Electronic Engineering Company		No Response
BELKNAP CONCRETE CUTTING & DRI		No Response

Bella Luna Engineering & Building Maintenance (Bella Luna Engineering & Building Maintenance)	No Response
Benchmark Building & Construction, LLC (Benchmark Building & Constructi on, LLC)	No Response
Bendler Boiler & Mechanical CO (Bendler Boiler & Mechanical CO)	No Response
Benny Building Maintenance Services LLC (Benny Building Maintenance Se rvices LLC)	No Response
Beshears Construction Inc	No Response
Best Value Management	No Response
Bethune Painting Inc	Viewed
Bienenstock Natural Playgrounds Inc. US	No Response
BioGreen of San Antonio	No Response
Biologique Solutions LLC	No Response
BioPURE (Jpete enterprises)	No Response
Blast Masters, Inc.	No Response
Bloomin' Blinds of Richmond (Mana, Inc.)	No Response
Blue Ribbon Fence Company, LLC	No Response
Bluejacket Industries Materials, LLC	No Response
BlueRock CG, LLC (BlueRock CG, LLC)	No Response
Bluum Technology USA	No Response
BNC Industries, INC.	No Response
Boen/Kemp Construction (Boen/Kemp Construction)	No Response
Bonded Lightning Protection Systems, Ltd.	No Response
BOOSTERS, INC	No Response
Bosanna llc	Submitted
Botton + Gardiner, Func (BARESQUE USA LLC)	No Response
Bowman Recruitment Solutions LLC	No Response
Boyter Brothers, LLC	No Response
Brad Drake Construction LLC	No Response
BradyPLUS Company (Brady Industries of Texas, LLC)	No Response
Branch Construction Group LLC	No Response
Bravery Construction	No Response
BreezyDay LLC (BreezyDay LLC)	No Response
Brewer-Garrett Company (Brewer-Garrett Company)	No Response

Brian D. Smith Cleaning Service LLC (Brian D. Smith Cleaning Service LLC)	No Response
Brinton Security Services (Brinton Electric Security Services LLC)	No Response
Brown Midwest Commercial Construction (Brown Midwest Commercial Con struction)	No Response
BTG Products (Buffalo Technology Group, Ltd.)	No Response
BTX Construction Group	No Response
Buck Services Incorporated	No Response
Buckles Resources LLC	No Response
Buoy Bros. Construction LLC	No Response
Burggraf Services, Inc	No Response
Burlington Industries	No Response
Burman Construction, LLC	No Response
Bush Sports Turf (Bush Sports Turf)	No Response
Business Furniture Inc.	No Response
Butler Insurance Network (Christopher Alan Butler)	No Response
C & D Modular Construction LLC	No Response
c3 sports n more	No Response
Cactus Industrial Services LLC (Cactus Industrial Services LLC)	No Response
CAET PMC (CAET Project Management Consultants, LLC)	No Response
Calidad Construction, LLC	No Response
California Hydronics Corporation	No Response
Cannon Services	No Response
Cantore Construction Company (Cantore Box Cabinet and Maintenance, Inc .)	No Response
Capital Pump & Equipment	No Response
Capital Shade LLC	No Response
Capitol AC Services	No Response
Captain Construction Co. LLC	No Response
Car Wrap City	No Response
Carter and Company (Walter M Carter Inc)	No Response
Carter-Lambert Divisions, LLC	No Response
Cartwright Tree Care	No Response

Castletop Logistics LLC		No Response
Casto Technical Services, Inc.		No Response
Catalyst PR		No Response
Catawba Lighting Solutions LLC		No Response
CATI Striping & Coating	Fail	No Response
CB Ketsal LLC		No Response
CB3, LLC (CB3 CONSULTANTS)		No Response
CBRE, Inc.		No Response
CCS Facility Services (CCS Facility Services)		No Response
CDM7 LLC (CDM7 LLC)		No Response
Centex Softwash (Evan Rossow)		No Response
Central Texas Elevator, LLC		Submitted
CentralSquare Technologies, LLC		No Response
Centrix Energy Partners LLC		No Response
CERRIS SYSTEMS INC National (Cerris Systems Inc)		No Response
CertainTeed Roofing		No Response
CF SUPPLY INC		No Response
CFE Services (May Enterprises, Inc)		No Response
Chadwell Supply (Chadwell Supply, Inc.)		No Response
Chappell's Cleaning Services, LLC		No Response
Charles Pest Control Services, Inc.		No Response
Chatham Worth (Chatham Worth)		No Response
Chenega Corporation		No Response
Chickasaw Management Services		No Response
Chicos Trail Inc DBA Little Guys Movers Waco		No Response
Chiller Services Inc (Chiller Services Inc)		No Response
Chilltex, LLC		No Response
Chrome Heating & Air Conditioning (Chrome Heating & Air Conditioning)		No Response
Cintas Corporation No. 2		No Response
circle c mechanical llc		No Response
City Fire Protection LLC		No Response
City Wide Facility Solutions (City Wide Maintenance Co. Inc.)		No Response

Clean and Bright Cleaning Services		No Response
Clean It Industrial		No Response
Clean Scapes		No Response
Clean SoftWash		No Response
Clean Surface LLC		No Response
Cleaning USA, LLC (Cleaning USA, LLC)	Fail	No Response
Clear-Armor LLC		No Response
Clermont Printing & Office Products (Clermont Printing Inc.)		No Response
Click Construction Services (Click Construction Services)		No Response
Climax Investors (Climax Investors)		No Response
Coach's Construction		No Response
Coastal Machine & Mechanical, LLC		No Response
Coastal Packaging Co., Inc.		No Response
Coastal Remediation (Coastal Remediation)		No Response
Cobb's Lawn & Landscape		No Response
Cody Vaughan Electric LLC		No Response
Colbi Technologies, Inc		No Response
Coleman International Inc		No Response
Combs custom solutions (Jennifer combs)		No Response
Combustioneer Corporation		No Response
Comfort Systems USA (Southeast), Inc.		No Response
CommandTec, LLC (CommandTec)		No Response
Commercial Kitchen Parts & Service (Greenwich, Inc.)		No Response
Commercial Restoration Company		No Response
Complete Contract Consulting (Complete Contract Consulting)		No Response
Complete Supply Inc		No Bid
Concept Facility Services		No Response
Concrete Leveling Technologies (Holiday Roofing LLC)		No Response
Conklin Office Services, Inc. (Conklin Office Services, Inc.)		No Response
ConstructConnect		Viewed
construction 95 llc		No Response
Construction bid source		No Response

Construction Journal		No Response
Construction Network, Inc		No Response
Containers On Demand LLC		Viewed
Contech Contractors Inc		No Response
CONTINENTAL HARDWARE INC (CONTINENTAL HARDWARE INC)		No Response
Cookeville Heating and Cooling Services LLC		No Response
Core by KHI Restoration (KHI Construction LLC)		No Response
Core Products Co, Inc. (Core Products Co, Inc.)		No Response
Correct Digital Displays, Inc.		No Response
Cotton's Electrical Contracting & Services, LLC (Cotton's Electrical Contracting & Services, LLC)		No Response
Covid Control Services LLC (Covid Control Services LLC)	Fail	No Response
Crawford Electric	Fail	No Response
Crescent Parts & Equipment		No Response
Crestone Commercial Construction		No Response
Criterion Management Services, LLC		No Response
Cross R's Company LLC		No Response
Crown Jewel Cleaning, LLC		No Response
Crystal Facility Solutions Inc		No Response
CS FENCE LLC		No Response
CUE Construction Services, LLC		No Response
Culligan of Omaha (Wichita Water Conditioning Inc)		No Response
Cummings Electrical (Cummings Electrical)		No Bid
Custom Cutters		No Response
D & H Quality Construction		No Response
D Gillette Industrial Services Inc		No Response
D&L Inc.		No Response
D&T Carpet Service LLC		No Response
DAISY I.T. SUPPLIES, SALES & SERVICE (DAISY WHEEL RIBBON CO. INC)		No Response
Dallas JMB Properties		Viewed
DataSpan Holdings Inc.		No Response
Daystar Services. (Daystar Cleaning Services, LLC)		No Response

DEAN BOILER INC.	No Response
Decco Contractors-Paving, Inc.	No Response
Decoulant Inc	No Response
DeHart Air Conditioning and Electronics Inc.	No Response
Del Mar College APEX Accelerator	No Response
Delaneys Restoration Inc.	No Response
DELTA GRASSMASTERS, LLC (DELTA GRASSMASTERS, LLC)	No Response
Delta innovative services (Delta innovative services)	No Response
Delta Office Products (Goosa Distributing Inc)	No Response
Denney Electric and Construction	No Response
Derrick Construction Company, (Derrick Construction Company,)	No Response
Desert Business Interiors, LLC	No Response
DevCare Solutions Ltd	Viewed
DGR United	No Response
Diamondback Landscaping & Lawn Care, Inc.	No Response
Direct Expansion Solutions	No Response
Direct Solutions (Direct Solutions)	No Response
Discount Telecommunications, Inc d/b/a Discount Telecom (Discount Telecom)	Viewed
DisinfectCARE (Global Disinfection Group, LLC)	No Response
DITTA ENTERPRISES LLC	No Response
dlb Consultants LLC (D. Bivens Consulting LLC)	No Response
DNA Plumbing Services, LLC	Viewed
D-N-D Services Inc	No Response
DOC Development Inc	No Response
Doho Weight Loss Clinic LLC (Doho Weight Loss Clinic LLC)	Viewed
Dominate the Hardwood Enterprises	No Response
Dominion Due Diligence Group, Inc. (Dominion Environmental Group, Inc.)	No Response
Don R Williams Remodeling & Construction	No Response
Doral Digital Reprographics Corp	No Response
Dorsey's Heating & A/C (Richard T Dorsey)	No Response
Double A Plus Engineering, LLC	No Response
Dougan Environmental Control Inc.	No Response

Down To Earth Services, Inc.		No Response
DRAIN RIGHT PLUMBING LLC		No Response
Dreamwalls (Gardner Glass Products)		No Response
Drive Auto Collision		No Response
Dunhill Construction		Viewed
Duran Concrete Services LLC		No Response
DVO-USA INC.		No Response
DWR Solutions		No Response
DYCHE Industrial Services LLC		No Response
Dynamic Contracts Consultants LLC (Memon)		No Response
Dynamic Fabrication Solutions LLC		No Response
Dynamic Logistics & Administrative Services LLC		No Response
Dynamic Preparedness Services		No Response
Dynamic Systems Inc		No Response
E1 Energy Saving Technology (Eagle First, Inc.)		No Response
E9 Construction LLC		No Response
EAST TEXAS AUTO AIR & GLASS (Schaetz Enterprises Inc.)		No Response
EAST TEXAS PROFESSIONAL CLEANING SERVICES		No Response
East Texas signs (Gerbine, Inc)		No Response
East Texas Sports Field Maintenance		No Response
EcoLite Holdings, LLC		No Response
EcoSmart (Dwight Eaton)	Fail	No Response
EDF GROUP		No Response
Ed's Supply Company		No Response
eduPARTS, LLC		No Response
Efficient Facilities International		No Response
EGA Construction Services LLC		No Response
EGR Water Well Service		No Response
Elevated Technologies Inc.		No Response
Elevator Control Service (Elcon Enterprises, Inc.)		No Response
Elevator Solutions Inc		Unsubmitted
Elevator Technologies Inc. (Myles)		No Response

Elevator Transportation Services, Inc. (Elevator Transportation Services)		No Response
Elevators of Beaumont (Stark Business Ventures L.L.C.)		No Response
Elias Squeaky Cleaning LLC		No Response
Elite Carpet & Matting Company, Inc.		No Response
ElstonAire, Inc.		No Response
EMCOR Services Fagan (EMCOR Services Fagan)		No Response
Emerson Fence Company		No Response
EMR Elevator, Inc.		No Response
Encompass Contractors North America		No Response
Energy Hunters		No Response
Energy Mechanical Services		No Response
Ener-Tel Services I, LLC		No Response
Entech Sales and Service		No Response
Environmental Consulting Group, Inc.		No Response
ePlus Technology, inc.		No Response
EPS LOGIX, INC. (EPS) (EPS LOGIX, INC.)		Viewed
ERC ENVIRONMENTAL and CONSTRUCTION SERVICES INC (ERC ENVIRONMENTAL & CONSTRUCTION SERVICES INC)		No Response
Erlys Janitorial Services		No Response
Essendant		No Response
Essential Constructs, LLC		Submitted
Estimators Corp (Estimators Corp)	Fail	No Response
EverLine Coating and Services (AJ Fourus Corp)		No Response
EverLine Coatings and Services of North Dallas (RBx2 Enterprises, LLC)		No Response
EVERVISTA LLC (EVERVISTA LLC)		No Response
Everything Yard, Inc. (Everything Yard, Inc.)		No Response
Exclusive Floors & Interiors		No Response
Executone of Louisiana (EXECUTONE OF CENTRAL LOUISIANA INC)		No Response
Exergenics USA, Inc.		No Response
Exoteriors LLC		No Response
Exterior Materials LLC		No Response
Extreme Exteriors Garden Center, LLC		No Response
Ez Systems (Ez Systems)		No Response

F&T Valley Motor Sports LLC		No Response
F.H. Paschen (F.H.Paschen, SNNielsen & Associates LLC)		No Response
FaceKey Corporation		No Response
Facilitex LLC		No Response
Facilities Management eXpress - FMX (Facilities Management eXpress)		No Response
Facilities Management Services, pbc.		No Response
FacilitiesCONNECT		Submitted
Facility Armor LLC		No Response
Facility Assessment and Consulting Team		No Response
FacilityONE Technologies, LLC.		No Response
Family Business Properties LLC		No Response
Fast Eddie's		No Response
Fastsigns College Station (KB & KB Enterprises)		No Response
FDG Construction (Faith Developers Group Inc)		No Response
FED Corporation		No Response
Federal One Supplies LLC (Federal One Supplies LLC)		No Response
FEDERAL PROTECTION, INC.		No Response
Fedpoint Systems LLC (Fedpoint Systems LLC)	Fail	No Response
Felix Auto Parts		No Response
Fence Concepts LLC		No Response
Fence Solutions Corp		No Response
Fercam Group (Ferkam Management Corporation)		No Response
Fidelis Networks, LLC		No Response
Fidis Logistics, LLC		No Response
Field Dots, LLC (Field Dots, LLC)		No Response
Fire King		No Response
Fitz Associates LLC		No Response
Fletch Window Tint (Fletch Window Tint)		No Response
FlexPro Surfacing LLC		No Response
Flood Out Restoration		No Response
Floortex USA LLC		No Response
Flores and Associates, LLC (Flores and Associates, LLC)		No Response

Flow Therapy Services LLC		No Response
FloWater, Inc. (FloWater/RTM Conference Attendee)		No Response
Forbo Flooring Systems		No Response
Foresight Services		No Response
Forever Fencing		No Response
Forrest City Plumbing, Inc		No Response
Fort Bend Services, Inc. (Fort Bend Services, Inc.)	Fail	No Response
FORTCON, INC		No Response
Fortress Elevator, LLC		Submitted
Frank A. Rogers & Co.		No Response
Frasier-Ousley Construction and Engineering, Inc.		No Response
FreeDoc (Frix Technologies)		No Response
Freemann Project Management Services LLC		No Response
FRESH START FACILITY SERVICES, INC.		No Response
FridgeWize		No Response
FTW Safety and Industrial Supplies, LLC		No Response
Fuerza Construction, LLC		No Response
Fujitec America Inc.		No Response
Futra-Vest Construction, LLC		No Response
FX Pro Construction (Full Axis, LLC)		No Response
G & T PAVING, LLC		No Response
GAR Construction		No Response
Garratt Callahan Co.		Viewed
Garret Shields (Garret Shields)		No Response
Gates Flag and Banner		No Response
GBPDIRECT (dean)		No Response
GC Services Maintenance and Janitorial (Colombican LLC)		No Response
GCC Enterprises Inc (Sully)		No Response
GD Resources LLC (GD Resources LLC)		No Response
General Commercial Solutions, LLC		No Response
General Sales of VA		No Response
GeoBasket LLC	Fail	No Response

Georgia Golf Construction (Georgia Golf Construction)		No Response
germrip, LLC (germrip, LLC)		No Response
GFE BUCKINGHAM LLC		No Response
GHD Advisory		No Response
Gill Digital Services, LLC		No Response
GK Contractors	Warn	No Response
Gleam Team Window Cleaning (Gleam Team USA LLC)		No Response
GLK Turf Solutions		No Response
Global Earth Products, LLC (BISD)		No Response
Global Force USA		No Response
Global Fuel Recovery		No Response
Global Garage Flooring of the Northeast LLC		No Response
GM Hill Engineering Inc		No Response
GM Roofing & Property Services (GAMCO llc)		No Response
Go To Services Inc		No Response
Gold Eagle Co		No Response
Golden Facilitation Enterprise LLC		No Response
Gordon Enterprise Group		No Response
GP Craft Inc		No Response
GP Plumbing (Byrom Enterprises LLC)		No Response
Graham Plumbing Inc		No Response
Grand River Maintenance and Services LLC		No Response
Grassworks Inc (Grassworks Landscape and Design Inc)		No Response
Gray's Construction, LLC		No Response
Graystone Concrete Solutions		No Response
Great Lakes Kwik Space		No Response
Green Seasons Landscaping		No Response
Greenhouse Electrical Professionals		Viewed
Greenscape Pump Services, Inc. (Greenscape Pump Services, Inc.)		No Response
Greenway Service, LLC		No Response
Grinning Bull, LLC dba Orkin Pest Control		No Response
Groves Industrial Supply		No Response

GSS, GLOBAL SUPPLY & SERVICE INC.		No Response
Guest Supply LLC (Sysco Guest Supply, LLC)		No Response
Guido Construction Company, Inc.		No Response
Guyton Industries, LLC		No Response
H&B Industries Inc.		No Response
H&H Exterior Cleaning Solutions		No Response
Hantho Outdoor Services		No Response
Har-Con Mechanical, LLC		No Bid
Hargis Electric		No Response
Harrison and Frances Medical Supplies	Fail	No Response
Harrison Glass LLC		No Response
Harrison Walker and Harper		No Response
Hart Contractor's of Texas, LLC		No Response
Hartson Total Opening Inc.		No Response
Hauling Ace Dispatching LLC		No Response
Hawkins Drywall		No Response
HBI OFFICE SOLUTIONS,INC. (HBI OFFICE SOLUTIONS,INC.)		No Response
HC Nye Company		No Response
Healthy School Supply, LLC		No Response
Heartland Sports Turf		No Response
Hearts and Family Foundation		No Response
HECMIS LLC dba Harper Electric CIMS (HARPER ELECTRIC)		Viewed
Helping Hands Services (Darshunda Osioh)		No Response
HEMPSULATION LLC		No Response
Henson's Greater TN Flooring (Henson & Associates Flooring)		Viewed
Henthorn Commercial Construction		No Response
Hepacart, Inc.		No Response
Herbert Heating & Air Conditioning Co., LLC		No Response
Hercules Relocation LLC		No Response
Herries Consulting		No Response
HES Facilities Management		No Response
HGI Facility Management (HGI, LLC)		No Response

High Access Solutions (High Access Solutions)		No Response
HigherGov (GovAlpha Inc)		No Response
Hill Country Tractor, LLC		No Response
Hill Manufacturing Company, Inc		No Response
Hillstone corporation		No Response
HIREARC LLC (HireArc LLC)		Viewed
His -N- Hers Handy Services LLC		No Response
HiTouch Business Services, LLC		No Response
Holloway Construction Company Incorporated		No Response
Hoopoe labs Inc		No Response
Hopson Project Services	Fail	No Response
Hou-Scape		Viewed
House of Mary Lou Home Care Solutions LLC		No Response
Houston Security film LLC (Houston Security film LLC)		No Response
Hovis Construction LLC.		No Response
Humble Elevator Service, Inc. (Humble Elevator Service, Inc.)		No Response
Hunt and Associates Inc.		No Response
Huseman Builders, Inc.		No Response
HWC Systems (H7W Cleaning Systems, Inc.)		No Response
Hygenics	Fail	No Response
IA Quality		No Response
IBEX Builds (Adam Bolton Construction & Consultation LLC)		No Response
ICD Builders Incorporated (ICD Builders Incorporated)		No Response
Identity Group Holdings		No Response
IDG Services, Inc		No Response
IGIW Sales & Edu		No Response
Imelda's Cleaning Service, LLC		No Response
Imperial Supplies		No Response
Inframark, LLC		No Response
Infrastructure Innovations, LLC	Fail	No Response
Inland Potable Services (Inland Potable Services)		No Response
Innovative Health & Safety Training Institute (Innovative Health & Safety Traini ng Institute)		No Response

Innovative Hybrid Resources LLC		No Response
InProduction Inc (InProduction Inc)		No Response
Insight Global		No Response
Integral AV Solutions (Integral AV Solutions)		No Response
Integrated Industries, LLC		No Response
Integrity Communication Technologies		No Response
Integrity Performance Group (Integrity Performance Group)		No Response
Integrity Pipeline Services		No Response
IntegriWard LLC		No Response
Intellific LLC	Fail	No Response
International Construction		No Response
International Consulting Unlt'd (KNS Industrial Supply)		No Response
Interplay Learning		No Response
IPC Eagle Corporation (IPC Eagle Corporation)		No Response
IT Vision Networks Inc		No Response
Itty Bitty Spider		No Response
IVMsolutions		No Response
Izy freights logistics		No Response
J B Warranties		No Response
J.M. Martin Custom Homes Inc.		No Response
Jack Rabbit Off-Road (JRO, LLC)		No Response
JACKarse Rentals		No Response
Jackrabbit Manufacturing		No Response
Jani-King of Memphis (River City Franchising LLC)		No Response
Jan-Worx		No Response
Jazzy Js LLC (https://jazzyjs.biz/)		No Response
JBI Distributors (JBI Distributors)		No Response
JC Elite Structures, LLC		No Response
JCS INDUSTRIES, INC		No Response
JD Distributors, Inc.		No Response
JDC Energy Resource, LLC		No Response
JennRand Diversified, L.L.C. (JennRand Diversified, L.L.C.)		No Response

JLG Services LLC	No Response
JMA Resources, Inc	No Response
JNA General Construction (JNA General Construction)	No Response
John Lee Enterprise, LLC	No Response
John's Custom Fabrication & Welding	No Response
Johnson Construction Services, LLC	No Response
Jonathan's Painting	No Response
Jordan Supply	No Response
JOSSY GOOD NEWS COMPANY LLC	No Response
JPJ Construction (JPJ General Contractor, LLC)	No Response
K & M Elevator, LLC	No Bid
K&R Mechanical Services LLC	No Response
K2 SERVICES, LLC	No Response
Karcher North America (Alfred Karcher SE & Co. KG)	No Response
KAT Turf Services, LLC (KAT Turf Services, LLC)	No Response
Kearney Pro-Builders	No Response
Ken's Heating & Air Conditioning (Johnson Service Co. LLC)	No Response
Kent Automotive (Lawson Products, Inc)	No Response
Kertrina Dauway Sales Consulting	No Response
Kijero LLC	No Response
Kindle Fischer Specialty Products (Kindle Fischer Specialty Chemicals, LLC)	No Response
Kings III Emergency Communications (Kings III of America, LLC)	Viewed
Kircher Construction, Inc.	No Response
kiwi services inc	No Response
Kleenit Facility Management LLC	No Response
Kleen-Tech Services, LLC	No Response
Kranco Roofing	No Response
KT Black Services LLC	No Response
L&L Gym Equipment Services (LL Gym Equipment Services)	No Response
L.J. Early Co., Inc.	No Response
LABSOURCE INC	No Response
Lacys Welding LLC	No Response

LaDanCo LLC	No Response
Lady Liberty Group, LLC	No Response
Lakeland Little Rock (Lakeland Little Rock)	No Response
Land Rec	No Response
Lang Specialty Trailers (Lang Specialty Trailers)	No Response
Langhorst Construction, Inc (Amy Schueddig)	No Response
Lawless Communications Group	No Response
LawnFX	No Response
LCS Kleen-Aire (LCS Kleen-Aire)	No Response
LDD Sports Construction, LLC	No Response
Legacy Electric (Brosh Enterprises LLC)	No Response
Lerch Bates Inc.	No Response
LeVis Consulting Group, LLC	No Response
Lighthouse Electrical Contractors	Viewed
Lights by Sparky Inc	No Response
Lindenmeyr	No Response
Linerz Inserts LLC	No Response
Lionheart Solutions	No Response
Locke Construction Services, LLC	No Response
Locus Diagnostics LLC (Locus Diagnostics LLC)	Viewed
Logistical Maintenance	No Response
Lone Star Boilers, LLC (Lone Star Boilers, LLC)	No Response
Lonestar dirt work and construction LLC (Stangle)	No Response
Lonestar Electric Supply (Lonestar Electric Supply)	No Response
Longview Occupational Medicine Clinic (Longview Medical Center, LP)	Viewed
Lous Cajun Creole	No Response
Loyd Excavation and Construction LLC	No Response
LPS GREEN TECHNOLOGIES (LPS GREEN TECHNOLOGIES)	No Response
LRMB Group , LLC (LRMB Group , LLC)	No Response
LSPS Solutions, LLC	No Response
L-Sync, LLC	No Response
LubeMatrix, Inc.	No Response

Lucid Concepts LLC	No Response
Lumalier (Lumalier)	No Response
Luna & Associates (Luna & Associates)	No Response
Luomu LLC	No Response
M&H Solutions LLC	No Response
M&M Micro Systems Inc.	No Response
M&P Roofing LLC	No Response
M/C ELECTRIC COMPANY INC	No Response
M2 Federal Inc (M2 Federal Inc)	Viewed
M3 Supplies & Services LLC	No Response
Madison Contracting LLC	No Response
Madison Sport Floors (Madison Finishing LLC)	No Response
Magic Turf	No Response
Magid Glove & Safety Mfg. Co.	No Response
Majestic Services, Inc.	No Response
MAKINA TROCAS	Viewed
Mako Industries (Mako Oilfield Services DBA Mako Industries)	No Response
Malek Inc	No Response
MANS DISTRIBUTORS	No Response
Marcorp Group LLC (Marcorp LLC)	No Response
Marksmen General Contractors, LLC	No Response
Marshal Stuff Inc (Terry Hambley)	No Response
Martin Mechanical	No Response
Matthis Construction Company Inc	No Response
MAXA Elevator Solutions LLC (MAXA Elevator Solutions, LLC)	Unsubmitted
MAXARI	No Response
Maximilian Vasquez LLC	No Response
Maxpro Enterprise	No Response
Mc & Sons Construction - Roofing (Mc & Sons Construction - Roofing)	No Response
MC Cleaning Services of Miami Inc	No Response
MC Global Management Consultants	No Response
Mccrary's Mow Time	No Response

McCure Company (McCure Company)	No Response
MCES Industries, LLC (MCES Industries, LLC)	No Response
McFadden's Lock And Key	No Response
McFly Pressure Washing (McFly Pressure Washing, LLC)	No Response
McKinney Office Supply (McKinney Office Supply)	No Response
McLarty Ford (THTS, Inc)	No Response
Mechanical Concepts	No Response
Mechanical Materials, LLC	Submitted
Mechanical Partners Inc.	No Response
Med Solutions LLC	No Response
MEDRX COMPOUNDING & PHARMACY (MEDRX COMPOUNDING & PH ARMACY LLC)	No Response
Medshield International Corporation (Medshield International Corporation)	No Response
Megahertz Technology (Megahertz Technology, Inc.)	No Response
Mersi Distribution	No Response
Metal Roof Coating LLC	No Response
Meteor Midstream Services (Taje and Co, LLC)	No Response
Metro Elevator Central Texas, Inc.	No Response
Metro Elevator DFW, Inc.	No Response
Metro Elevator Houston, Inc (Metro Elevator Houston, Inc)	No Response
Metro Elevator Waco, Inc.	No Response
Metro Pure Water LLC	No Response
Metroplex Welding Supply	No Response
Metropolitan Corp	No Response
Metro-Repro Inc (Metro-Repro Inc)	No Response
MG XTREME ELECTRONICS & ACCESSOIRES	No Response
Micro Plan Masonry, Inc.	No Response
Micro-blok Solutions	No Response
Mid American Research Chemical	No Response
Mid-Ark Security (Central Arkansas Security Systems, Inc.)	No Response
Midas Contractors LLC (Midas Contractors LLC)	No Response
Mid-States School Equipment (Mid-States School Equipment Co. Inc.)	No Response
Mid-Tex of Midland, Inc.	No Response

Midway Restaurant Supply	No Response
Midwest Audio Visual (Midwest Audio Visual)	No Response
Midwest Concrete Solutions	No Response
Midwest GMAX and Turf Maintenance	No Response
MightyGood Solutions	No Response
Mike Barnett Construction (M & S Barnett Construction, LTD)	No Response
Mikocorp LLC (Mikocorp LLC)	No Response
Millennial Business Solutions LLC (Millennial Business Solutions LLC)	No Response
Millennium (Kyle Enterprises LLC)	No Response
Miller Engineering Co. (Miller Engineering Co.)	No Response
MINDFORE INC (MINDFORE INC)	No Response
Minimise USA LLC	No Response
Minuteman Industrial Supply (Chris White)	No Response
Miracle Method Chicago NW Metro (Fred Haas & Associates INC.)	No Response
Miracle Recreation Equipment Company (Miracle Recreation Equipment Co mpany)	No Response
MITSTRIKE LLC	No Response
MJR EDUCATIONAL SUPPLIES	Viewed
ML Deer Construction Company (ML Deer)	No Response
Modern Business (Modern Business Equipment, Inc)	No Response
Modern Day Concrete Inc.	No Response
Modern Mechanical Services (Modern Mechanical Services)	No Response
Momentum Global Solutions, LLC	No Response
Monarch (Monarch Trucking LLC)	No Response
Monarch Specialties, LLC	No Response
Morgan Scott Construction Company (Morgan Scott Management Consultan ts)	No Response
Moser Engine Service, Inc.	No Response
Moser Roofing Solutions, LLC (Moser Roofing Solutions, LLC)	No Response
Motion Industries	No Response
Mount Vernon Pecan Company	No Response
Mountain Consulting, Inc. (Mountain Consulting, Inc.)	No Response
Mouton 3 Services LLC (Mouton 3 Servcies)	No Response

Mower Medic and Power Equipment (Woodvest LLC)	Fail	No Response
MRI Construction Inc		No Response
MSC Industrial Supply		No Response
MT Contracting		No Response
MTG Construction & Renovations LLC (MTG Construction & Renovations LLC)		No Response
MTM Services		No Response
Munoz Flooring Solutions		No Response
My Medical (Aviationy LLC)	Fail	No Response
Myron McDowell Construction LLC		No Response
N&H Contractors LLC		No Response
N.E. Texas Roof System, LLC		No Response
NAISS (NAISS)		No Response
Nance International		No Response
Nash Window Tint		No Response
Nassau Trading Inc.		No Response
National Contract Flooring		No Response
National Elevator Inspection Services, Inc. (National Elevator Inspection Services, Inc.)		No Response
National Roofing Partners (RL National Roofing Partners, LLC)		No Response
Native American Contracting & Supply, LLC (Native American Contracting & Supply, LLC)		No Response
Naturally Purposed		No Response
NDH Service LLC		No Response
Neal Johnson LLC		No Response
Nelson Elevator, LLC.		No Response
NewGold, LLC		No Response
Newman Regency Group		No Response
NexRev (NexRev, LLC)		No Response
Nexus		No Response
Nexus AI (Courseflow)		Viewed
Nichols Development Group LLC		No Response
Nicks test		No Response
Nightlock (Taylor Brothers Door Lock, LLC)		No Response

Niyam Construction (Niyam LLC)	No Response
NoGapsHere Health Solutions, Inc. (NoGapsHere Health Solutions, Inc.)	No Response
Noria Corporation	No Response
North Coast Studios, Inc.	No Response
North Texas 101 Mobility LLC (101 Mobility)	No Response
Northeast Texas Plumbing, LLC	No Response
Northwest Center	No Response
Norton Facility Maintenance	No Response
Novotx LLC	Viewed
Numunu Staffing, LLC. (Numunu Staffing, LLC.)	No Response
Nuvar Inc. - Pivotables Inc. - Goldie Products (Nuvar Inc.)	No Response
Nuwave Holdings LLC	No Response
NYX, INC.	No Response
Office Products Alliance (K&M OFFICE PRODUCTS, INC.)	No Response
Office Source (Office Source)	No Response
OHEIL SITE SOLUTIONS (OHIO IRRIGATION LAWN SPRINKLER SYSTEM S INC.)	No Response
OJ's Janitorial & Sweeping Service, LLC	No Response
O'Krent Floors	No Response
Oldham Welding (Chris Oldham Welding)	No Response
Olsson Roofing Company, Inc. (Olsson Roofing Company, Inc.)	No Response
Omni Energy Partners	No Response
On the Go Janitorial Services	No Response
One World MFG LLC (One World MFG LLC)	No Response
Opamp Information Management, LLC (Opamp Information Management, L LC)	No Response
Operational Professional Services LLC	No Response
OPTICAL DISTRICT	No Response
Option 1 Logistics (TFAM Solutions LLC)	No Response
Oracle Elevator	No Response
Oracle Elevator Co.	No Response
osyosy business llc	No Response
Otis Elevator Company	No Response

Otsego Outdoor Power (Riverside Outdoor Power LLC)		No Response
Outdoorsiness		No Response
Outfitters Construction LLC	Fail	No Response
Outlook Turf (Outlook Turf Manufacturing)		No Response
Overhead Door Inc.		No Response
P&P Roofing/Construction		No Response
P3S Corporation		No Response
Pace Construction Services LLC (Pace Construction Services LLC)		No Response
PacificWest Energy Solutions, Inc.		No Response
Paige Management LLC		No Response
Paint Boss GA (Paint Boss GA)		No Response
Palmer Conservation Consulting (PALMER CONSERVATION CONSULTIN G, LLC)		No Response
Pannell Industries Inc		No Response
Paradigm Masters Management		No Response
Paris Glass & Mirror (Gillie Company LLC dba Paris Glass & Mirror)		No Response
Park Supply Company, Inc.		No Response
Parrish Hare		No Response
Patriot Fence (Patriot Fence)		No Response
PATTERSON PEST PATROL LLC		No Response
Pavement Resources Inc		No Response
PDV Associates, Inc		No Response
Pecos Construction and Fencing, LLC		No Response
Pelco Builders, Inc.		No Response
Pera Inc.		No Response
Personnel Services Development	Fail	No Response
Pest Management, Inc		No Response
Pet and Playground (Hercules Poly)		No Response
Phoenix Contractors, LLC		No Response
Phoenixx Solutions LLC (US)		No Response
Phone and Pad Warehouse (iphone and ipad warehouse)		No Response
PIATRA INC.		No Response
Pick-it Construction		No Response

Pinnale Network Solutions (Pinnale Network Solutions)		No Response
Plastic Connections, Inc. (Plastic Connections, Inc.)		No Response
Platinum General Contracting & Land Development LLC (Platinum General Contracting & Land Development LLC)		No Response
Platinum Striping and Sealcoating, LLC		No Response
PLM Spraying LLC		No Response
Polaris Services, LLC		No Response
Polyguard Products		No Response
Poston & Associates		No Response
PowerPlay Cleaning		No Response
Precision Control Systems, Inc. (Precision Control Systems, Inc.)		No Response
Precision Roofing Inc		No Response
Premier Sign Systems, LLC		No Response
PREMIER SOLUTION'S GROUP (PREMIER DISPATCH & LOGISTICS LLC)		No Response
Pressure Werx, LLC	Fail	No Response
Prestige Elevator Services		No Response
Preston Design & Construction Consulting		Viewed
Prèvoyance Solutions, LLC		No Response
Prime Time Companies, PC		No Response
Priority-1, Inc.		No Response
Prism Electric Inc		Viewed
Prodigy Building Solutions, LLC		No Response
Professional Choice Fire and Security Systems (PCFSS LLC)		No Response
Professional Pavement Services, LLC (Professional Pavement Services, LL C)		Viewed
Professional Roofing Contractors, Inc. (Professional Roofing Contractors, In c.)		No Response
Professional Tree Care Group LLC		No Response
Projects by Design LLC		No Response
ProMed Medical Solutions (Pro Med Medical Solutions, LLC.)		No Response
Property Works (Property Works)		No Response
Proposalhelper, LLC (Proposalhelper, LLC)		No Response
Protecall LLC		No Response

PSG ENERGY SERVICES LLC		No Response
Puradigm Mid-America (TradeMark Environmental Technologies LLC)		No Response
PureUV, LLC		No Response
PureWay Compliance		No Response
PuroClean of Southlake (Southlake Restoration Holdings, Inc.)		Viewed
Purvis Industries LLC		No Bid
Push Pedal Pull		No Response
Putnam Fire and Security, LLC.		No Response
PWXPress (PWXPress)		No Response
QCS Professional Cleaning Service (Quality Cleaning Systems LLC)	Fail	No Response
QikTurf		No Response
Quality Plumbing, Inc.		No Response
Quantum Medical (Graduate Plastics Inc)		No Response
Quick Stripe Paving, Inc.		No Response
Quicklert Inc.		No Response
Quinn & Co Designers		No Response
QYK BRANDS LLC (QYK BRANDS LLC)		No Response
R&B Roofing LLC (R&B Roofing LLC)		No Response
R&R Controls		No Response
R.C. Wegman Construction Company (Rozanski)		No Response
R.J. Carroll CO.		No Response
R3 ROBOTICS, LLC	Fail	No Response
Rack Em Up Construction		No Response
Rave Energy (TZMedia LLC)		No Response
Raven Mechanical, LP		No Response
RazorClean Building Services Inc.		No Response
RB Doors and Hardware Inc		No Response
RC4Vets	Fail	No Response
RCJ Roofing & Construction (Rene Cerda Jr Roofing & Construction)		No Response
RE Global (Residential Enhancements, Inc.)		No Response
Real Estate Services, LLC (A Plus Real Estate Services, LLC)		No Response
Reconstruction Experts Inc		No Response

Red Ball Oxygen		No Response
Red Hill Supply (Red Hill Ventures, LLC)		No Response
Reddz Global Logistics, LLC		No Response
Reep's Air & Refrigeration LLC	Fail	No Response
Reese air services matt		No Response
Regency Enterprises Services LLC		No Response
Regency Staffing		No Response
Regional Construction Services LLC (Regional Construction Services LLC)		No Response
Reliant Elevator Inspections & Consulting (Reliant Elevators, LLC)		No Response
REMS-AV, LLC		Viewed
Rendon Industry Solutions, LLC		No Response
Renegade Construction LLC (Renegade Construction LLC)		No Response
Renowned Chemical Solutions, LLC		No Response
Rescue Heating & Air, LLC		No Response
Restoration nation inc		No Response
Revenue Arm (Cole Sells Well)		No Response
RevoTRAC, LLC		No Response
Reynolds Electric Heating and Air Conditioning Service, LLC (Reynolds Electric Heating and Air Conditioning Service, LLC)		No Response
RFPGurus (RFPGurus)		No Response
RGL Construction LLC		No Response
RGV GUARDIAN ENTERPRISES, LLC		No Response
Rhino Health inc	Fail	No Response
Richard D. Smith and Sons, Inc		No Response
Rider Construction Group, LLC		No Response
Ridgecore Solutions, LLC (Ridgecore Solutions, LLC)		No Response
Right A Way Transports and Logistics		No Response
Rio Elevator Company, Inc.		Submitted
Rio United Builders, LLC		No Response
Ritz Safety (Ritz Safety)		No Response
RKI, INC. (RKI, Inc.)		No Response
Roadrunner Traffic Signs LLC		No Response
Robert Madden industries		No Response

Roberts Asphalt Sealing & Striping (Roberts Asphalt Sealing & Striping)		No Response
Rocky Mountain Power Generation (Rocky Mountain Power Generatio)	Fail	No Response
Rodriguez Welding & Construction		No Response
Roger Woods Electric (Roger Woods Electric)		No Response
Ronald D Hicks		No Response
Roof Spec Solutions LLC		No Response
Roofing Solutions Group, Inc.		No Bid
Royal Media Network Inc (Royal Imaging Solutions)		No Response
RPB ROOFING & CONSTRUCTION		No Bid
RPM Auto Auction (RPM Auto Auction)		No Response
RR MULTISERVICES LLC		No Response
RR Multiservices LLC		No Response
RS DEMOS & PILINGS LLC		No Response
RT Solutuions Group		No Response
rtg fleet service llc		Viewed
Rushing2Winders LLC (Rushing2Winders LLC)		No Response
S D Williams Investments		No Response
S E C Contracting Inc. (Smith's Epoxy Coatings)		No Response
S&M Cleaning Services (Shawn Nichols)		No Response
S2 services		No Response
S4th Power Group		No Response
SafeRack LLC (Thompson)		No Response
SAFETY EDUCATION RESEARCH GROUP, LLC.		No Response
Safety Film USA (Flip Lok LLC)		No Response
SafetyNet America (Safety Net, LLC)		No Response
Salazar Remodeling LLC		No Response
SAM TELL & SON INC.		No Response
Sanalife (InTech Energy, Inc.)		No Response
Sanalife Wellness		No Response
Sanford Federal, Inc.		No Response
Sawmill Specialties (Satterwhite Companies, Inc.)		No Response
Sawyer Services		No Response

SBC WASTE SOLUTIONS INC	Fail	No Response
Scaravalle Services, Inc. (Scaravalle Services, Inc.)		No Response
Schindler Elevator (Schindler Elevator)		No Response
Schumacher Construction Services LLC		No Response
Schumacher Elevator Company		No Response
SCM Consultants Inc.		No Response
SDR Facility Solutions (Marilyn R Seeley)		No Response
SEC, Snellstrom Electrical Contracting (David M Snellstrom)		No Response
Security101 (Ford Industries Inc)		No Response
Selco Seating and Courts LLC (Selco Seating and Courts LLC)		No Response
Select Commercial Services LLC		No Response
Selective Micro technologies		No Response
SEMCO LLC		No Response
Service Logic & Controls, LLC		Viewed
Service Master Services (BSRK INC)		No Response
Service Squad,Inc. (Service Squad,Inc.)		No Response
ServiceMaster of Seattle (ServiceMaster Recovery Management of Seattle)		No Response
ServiceMaster Recovery Management (SRM) (DSI Holdings Corporation)		Viewed
SERVPRO of Central Union County (SERVPRO of Central Union County)		No Response
SERVPRO of Cumberland, Morgan & White Counties (Priority Restoration)		No Response
Servpro of Dunedin/ Palm Harbor South (Royal Restoration LLC)		No Response
SERVPRO of Fernandina Beach/Jacksonville NE (SERVPRO of Fernandin a Beach/Jacksonville NE)		No Response
SERVPRO of Marshall, Sedalia, Columbia (Icc, LLC)		No Response
Servpro of Northeast Collin County (A & E Services, LLC)		No Response
SERVPRO Of Southern Trumbull County (Dobson Family Partnership LLC)		No Response
Servpro of Wichita Falls (Servpro)		No Response
SETEX Facilities & Maintenance, LLC		No Response
Shamrock Roofing & Construction (Shamrock Roofing & Construction)		No Response
SHEET METAL CONTRACTORS INC		No Response
Shelby Distributions		No Response
Sign Solutions of East Atlanta, LLC		No Response
Signature Advisory Partners		No Response

Signature Roofing And Coatings (Signature Roofing And Coatings)		No Response
Signetcbyer LLC (Jackson)		No Response
Simply Commercial LLC		No Response
SITE AND FIELD ENTERPRISES LLC		No Response
SITEX Environmental LLC		No Response
SKEETER KELL SPORTING GOODS		No Response
SKICK CONCEPTS INC. (SKICK CONCEPTS INC.)		No Response
SKILLED CONSTRUCTION SUBS UNLIMITED		No Response
Skilled Services Quality Construction LLC (Skilled Services Quality Construction LLC)		No Response
Skypine Roofing (Four Reserves llc)		No Response
Skytec Elevator, LLC (Skytec Elevator, LLC)		No Response
SLG Lighting (Spring Lighting Group, Inc)		No Response
Sloan’s technology		No Response
Smallwood Lock & Supply (Smallwood Lock & Supply)		No Response
Smart Rain LLC		No Response
Smith Construction Group, LLC. (Smith Construction Group, LLC.)		No Response
SMITTY ECOMMERCE LLC		No Response
SMTA ENTERPRISES INC	Fail	No Response
SNR Construction & Consulting LLC		No Response
Solid Natural Solutions (Ni's Naturals LLC)		No Response
SolutionsAe, Inc.		No Response
Sorb•ables (Sorbables)		No Response
Soulard Technology (Soulard Technology)		No Response
South Texas Boiler Industries, LLC (South Texas Boiler Industries, LLC)		No Response
South Texas Horticulture (South Texas Horticulture)		No Response
SouthCo Commercial		No Response
SOUTHERN BROTHERS PROPERTIES LL		No Response
Southern Management Services / HES Facilities		No Response
Southlake Group LLC		No Response
Southwest Solutions (Thurston, Owens & Newman, LLC.)		No Response
Sparks Services		No Response
Spartan Surfaces, Inc.		No Response

SpawGlass Construction Corp. (SpawGlass Construction Corp.)		No Response
SpawGlass Contractors, Inc.		Viewed
Spheronomics		No Response
Splash Power Washing (Splash Power Washing)		No Response
Sports Floors Inc. (The Davis Robinson Group Inc.)		No Response
SSC Signs & Lighting		No Response
Staat Inc.		No Response
StallStash (Bansaw Industries, LLC)		No Response
Stamar Packaging, Inc. (Stamar Packaging, Inc.)		No Response
Stanfran Transport (A1 Mobil Fleet Wash & Detail Service Inc.)		No Response
Stansell Services		No Response
Stars Media Group		No Response
Stephens Painting, Inc		No Response
Sterling Services of Texas LLC		No Response
Sterling Temporary Staffing, LLC (Sterling Temporary Staffing, LLC)		No Response
Stewart Builders, LLC		No Response
Stewart Signs (Redmont Signs)	Fail	No Response
Storer Services, LTD		Viewed
Strategic Consulting Alliances, LLC (Strategic Consulting Alliances, LLC)		No Response
Sullivan Contracting Services (Pounds Group LLC)		No Response
SUNBELT SUPPLY LLC (SUNBELT SUPPLY LLC)		No Response
SUNTRONICS LED INC		No Response
Superior Broadband Services		No Response
Superior Commercial Cleaning (Superior Commercial Cleaning)		No Response
Superior Industrial Products		No Response
Superior Sealcoating Cleaning LLC		No Response
Superior Thermal Services, LLC (Superior Thermal Services, LLC)		Viewed
SUPPLY SIDE USA (SUPPLY SIDE USA)		No Response
Supplyitall		No Response
Supreme Construction & Maintenance (Adela Mendez)		Viewed
Sustainability Management Partners, LLC (Sustainability Management Partners, LLC)		No Response
SUSTAINABLE FACILITES MANAGEMENT		No Response

Swain Enterprises LLC (Robert Swain)	No Response
Swat Contracting LLC	No Response
SwētSPOT LLC	No Response
Swift Sensors	No Response
Swinerton (Swinerton Builders)	No Response
Swordsmen Roofing & Construction, LLC (Swordsmen Roofing & Constructi on, LLC)	Viewed
Synergy Custom Fixtures	No Response
Synergy Development & Construction, LLC (Synergy Development & Constr uction, LLC)	No Response
Synergy Healthcare LLC	No Response
Sysco Guest Supply (Guest Supply)	No Response
Talarai LLC	No Response
Talon Commercial Services	No Response
Tamburro Interiors, LLC (Tamburro Interiors, LLC)	No Response
Tampon Tribe, Inc. (Tampon Tribe, Inc.)	No Response
Taproot Solutions Inc (Taproot Solutions Inc)	No Response
Taylor Company, DBA TRUCOM, DBA TREIN Management (Matthew Taylor)	No Response
TBI Solutions, LLC	No Response
TDC Waterproofing & Restoratio	No Response
Team Mechanical of Texas, LLC	No Response
Team North Texas (Akrongoniaios, Inc.)	Viewed
Tech Electronics, Inc	No Response
Tejas Elevator Co	No Response
Tejas Office Supplies	No Response
Tekton Development Inc.	No Response
Teltech Communications LLC	No Response
Tenacity Marketing Group	No Response
Ter-Jan Company	No Response
Tessera Technology Group	No Response
Teters Faucet Parts Corporation	No Response
Texas Eagle Solutions LLC (Texas Eagle Solutions LLC)	No Response
Texas Hub Biz (Texas Hub Biz)	No Response

Texas Paint & Wallpaper Co. (Helm Paint & Supplies)	No Response
Texas Patriot Contracting LLC	No Response
Texas Power Equipment Inc.	No Response
Texas Resource Marketing LLC	No Response
Texas Timberjack Inc.	No Response
Texas Vets Roofing	No Response
Texas Yard Pro, Inc.	No Response
Tex-Gon Plumbing	Unsubmitted
The Ancient Bakers (Vision's Sown, An Ancient Baking Company, Inc.)	No Response
The Bid Calendar	No Response
The Bravery Company (Bravery Construction)	No Response
The Caxton Printers Ltd.	No Response
The Cecilia Global Group	Viewed
The Comfort King (Gideon Lynn LLC)	No Response
The CourtSmiths (Smith-Wheeler Inc.)	No Response
The DKP Group	No Response
The Experts in Slides	No Response
The Faulk Company	No Response
The H.A.B.I.T.S. Group (Zacharias Johnson)	No Response
The i-MAGE Corporation	No Response
The Karen Group, LLC	No Response
The Kings Midwest Division LLC	No Response
The Murphy Contracting Company (The Murphy Contracting Company)	No Response
The Planit Room	Viewed
The RhysIvy Company	No Response
The Safeguard System Inc. (The Safeguard System Inc.)	No Response
The Scarlette Group	No Response
The Severson Group	No Response
The Steam Team	Viewed
The Trade Group	No Response
Thermflo, Inc.	No Response
Thompson Safety, LLC	No Response

Threshold Brands		No Response
Thunder River Construction, LLC		No Response
Tidal Wave Wash Supply Inc.		No Response
TMA LASER GROUP, INC		No Response
TODAYS OFFICE INC NWA	Fail	No Response
Tom Ethen Enterprises (Tom Ethen Enterprises)		No Response
Tools Required, LLC		No Response
Total Energy Solutions (Total Energy Solutions)		No Response
Total Green Services		No Response
Total Lawn & Fence (Greg Goolsby Enterprises)		No Response
Trans Globe, LLC.		No Response
Transit Safety and Security Solutions		No Response
Transtelco/IP Matrix (Transtelco/IP Matrix)		No Response
Triangle (Triangle)		No Response
Tri-gen Construction LLC		No Response
Trigg General Construction, Inc	Fail	No Response
Triple-S Janitorial Supply (Third Gen LLC)		No Response
Troy Flooring Center (Troy Flooring Center)		No Response
Tru Matrix Contracting Services LLC		No Response
Tupallc		No Response
TUPELO MANAGEMENT LLC		No Response
Turner Roofing Services		No Response
TWG of America, Inc.		No Response
Two Way Direct		No Response
TXMC LLC		No Response
Tynes Property Management		No Response
U-C Holdings, Inc., (UNX-Christeyns, LLC)		No Response
Unalakleet Investments, LLC		No Response
United Construction (Dmd Elite LLC)		No Response
United Elevator Services		Submitted
United Manufacturing and Distribution LLC (United Manufacturing and Distribution LLC)		No Response
UNITED SAINTS PROTECTIVE SVS, LLC	Fail	No Response

Universal Fire Systems LLC	No Response
Universal Rental LLC	No Response
UPMLLC	No Response
Upper Arlington City Schools	No Response
Urban Elevator Service TX (Urban Elevator Service TX)	No Response
US Products, LLC.	No Response
UVC CDE Sanitation Services LLC (Uvc CDE Technology LLC)	No Response
Uweport LLC	No Response
Uzziel Services LLC (Uzziel Services LLC)	No Response
Valhalla Contracting (Red Rabbit LLC)	No Response
Valor Lift Elevators, LLC	Viewed
Valor Packaging Inc	No Response
Vantage Elite Logistics	No Response
Vaquero Truck and Trailer Parts (Long Shot Trucking Services LLC)	No Response
Vasco Sports Contractors (Vasco Asphalt Company)	No Response
Vecoplan	No Response
Ventured Sole LLC	No Response
Venus Supplies and Services, d.b.a. Total Facilities Solutions (Venus Supplies and Services)	No Response
vertex marketing	No Response
Vertical Events and Solutions Inc	No Response
VICTORIA COMMUNICATION SERVICES, INC	No Response
VIP Special Services LLC	No Response
virus solution	No Response
Vita Contractors LLC (Vita Construction LLC)	No Response
VTS Group Inc	No Response
VXI Global Solutions, LLC.	No Response
W & P, LLC	No Response
W&B Enterprises, LLC	No Response
W. W. Cannon (W. W. Cannon)	No Response
W.W. Grainger, Inc. (W.W. Grainger, Inc.)	No Response
Wagner Construction Services (Wagner Construction Services)	No Response
Washed New LLC	No Response

Washing Equipment of Texas		No Response
Waterman Construction		No Response
Watson Cleaning Services, Inc. (paula robertson)		No Response
Wayman and Company LLC DBA City Wide Facility Solutions - Wichita		No Response
WB Contracting Group,Inc.	Fail	No Response
Weathershield Roofing & Repairs (Weathershield Roofing & Repairs)		No Response
Wedge Supply (Imperial Bag & Paper Co LLC)		No Response
Weems Asphalt (Weems Asphalt)		No Response
Wellington Facility Services (CBMAA, Inc.)		No Response
Wells Truck and Trailer Repair		No Response
WENDINBOUDE INVESTMENT GROUP		No Response
West Texas Film Solutions LLC (robertson)		No Response
Westco Ventures LLC		No Response
Western Oilfields Supply Company dba Rain for Rent		No Response
Western Roof Co. (Bravo Sierra W Holdings LLC)		No Response
Western Shelter Systems (WS Acquisition LLC)		No Response
Westlake Hardware Inc.		No Response
White Horse Distribution, LLC		No Response
White Rock Construction & Services Inc.		No Response
Whitewall Construction (Salinas Holdings, LLC)		No Response
Wilderline LLC		No Response
Wiley Calhoon Company, Inc		No Response
Williams Business Strategies of Oklahoma, LLC		No Response
Williamson Heat and Air		Viewed
Wilson Unlimited, LLC		No Response
Window Film Dallas		No Response
wisecom technologies		No Response
Wolvestown LLC (Wolvestown LLC)		No Response
WTKCC (Woods TurnKey Conglomerate Corporation)		No Response
WURTH USA, INC		No Response
X & T Enterprise Company		No Response
X CEL BUSINESS PRODUCTS		No Response

X&TEnterprise	No Response
X-Act Plumbing LLC	No Response
Xcel Plus Group LLC (Xcel Plus Group LLC)	No Response
XHLogistics LLC	No Response
Xsaada Solutions LLC	No Response
Xtralight Manufacturing LTD	No Response
YA THECLEANERPRO INC	No Response
Yalla Ventures, Inc.	No Response
yanilex systems llc	No Response
Young's For Transit LLC	No Response
YOURS – General Construction, Facilities Maintenance, and Restoration, LLC.	No Response
Zertuche Construction Texas	No Response
ZITRO ELECTRIC LLC	No Response
Zyaa Inc	No Response

Participant Detail

(FSS) Foodservice Sustainability Solutions

Address:	2106 Moon Station Dr. NW Kennesaw, GA 30144 (800) 351-8875	Response Status:	No Response
		Invitiation Date:	5/1/2025
		Invitiation Emails:	keger@fs-sustainability.com
Classifications:	SBE (Primary)		
Participation Type:	Active Supplier		
Email Status:			
Invitiation Type:	Automatic		

11 Series Energy, Inc.

Address:	4525 Pagosa Springs Circle Melbourne, FL 32901 (918) 850-9094	Response Status:	No Response
		Invitiation Date:	5/1/2025
		Invitiation Emails:	macksasser@11seriesenergy.com russwarrington@11seriesenergy.com
Classifications:	DBE (Primary) MBE DVB SBE SBD		
Participation Type:	Active Supplier		
Email Status:			
Invitiation Type:	Automatic		

152nd LLC

Welcome to the Dynamic Small Business Search

DSBS

Interested in assisting the Federal Emergency Management Agency (FEMA) response to disasters? Click here: Doing Business with FEMA | FEMA.gov

Location of Profile

States:

(any state)
AL - Alabama
AK - Alaska
AA - American Atlantic (APO/FPO)
AE - American Europe (APO/FPO)
AP - American Pacific (APO/FPO)
AS - American Samoa
AZ - Arizona
AR - Arkansas
CA - California

(How to make multiple selections.)

Searching within a State:

(Requires exactly one state from the State list at left.)

Congressional District

County: Select 1 State, then press Lookup Lookup

Area Code or Phone Number Initial Fragment

Metropolitan Statistical Area

SBA Servicing Office

Zip Code or Zip Code Initial Fragment

Government Certifications

8(a) Certified or 8(a) Joint Venture:

- (●) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- ( ) Not Required

Women Owned Small Business(WOSB):

- ( ) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- (●) Not Required

HUBZone Certification:

- ( ) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- (●) Not Required

Economically Disadvantaged Women Owned Small Business(EDWOSB):

- ( ) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- (●) Not Required

Veteran-Owned Small Business or Joint Venture:

- ( ) Required (Active Certifications only)
- (●) Not Required

Service-Disabled Veteran-Owned Small Business or Joint Venture:

- ( ) Required (Active Certifications only)
- (●) Not Required

All filters in Government Certification section will return all relevant firms, including firms with expired SAM.gov profiles.
For more information, see also SBA Certifications in the search help page.

Ownership and Self-Certifications

- [x] Any Minority Owned:
  - [x] Any Native American Owned:
    - [x] Tribally Owned
    - [x] Alaskan Native Corp (ANC) Owned
    - [x] Native Hawaiian Org (NHO) Owned
    - [x] Other Native American
  - [x] Other Minority Owned
- [x] Community Development Corporation (CDC) Owned
- [x] Self-Certified Small Disadvantaged Business
- [ ] Self-Certified Service-Disabled Veteran-Owned
- [x] Self-Certified Veteran-Owned (including Service-Disabled Veteran-Owned)
- [ ] Self-Certified HUBZone Joint Venture
- [x] Any Self-Certified Women-Owned Small Business
  - [x] Self-Certified Women-Owned Small Business
  - [x] Self-Certified Women-Owned Small Business Joint Venture

(To start over in this section, if you like, you can use this hotlink: Clear These Checkboxes)

Specific Nature of Business

NAICS Codes: (•) Any ( ) All (slower) 423830,333921,238290

Keywords: (•) Any ( ) All (slower)

General Nature of Business

[ ] Manufacturing [ ] Construction [ ] Research & Development [ ] Services

Minimum Acceptable Bonding Levels

Construction Bonding Level (per contract)

Construction Bonding Level (aggregate)

Service Bonding Level (per contract)

Service Bonding Level (aggregate)

Quality Assurance Standards

[ ] ANSI/ASQC Z1.4 [ ] ISO-9000 Series [ ] ISO 10012-1 [ ] MIL-Q-9858 [ ] MIL-STD-45662A

Size

( ) At least (•) No more than

Employees and/or Annual Gross Revenue

Capabilities

Accepts Government Credit Card? ○ Required ◉ Not Required

Exporter? ○ Yes ○ Wants to Be ○ Either ◉ Not Required

☐ Has an Export Profile in TM OnLine (*)

(*) To search the contents of "Export Profiles", use the DSBS-affiliated Trade Mission Online Search ("TM OnLine").

Searching for a specific profile

CAGE Code: CAGE Cod

UEI: UEI

8(a) Case Number: 8(a) Case #

(Note: Searching by name is slower than other criteria.)

Company Name or Trade Name: Company Name or Trade Name

○ Do "sounds like" matching

◉ Do "first letters" matching

○ Do "contains" matching

Profile Status

Last Updated

○ On or before ◉ On or after mm/dd/yyyy

Status

☑ Active (default)

☐ All (Active and Expired Profiles)

Search Results Display Options

Maximum number of profiles to be returned at a time:

Show All

Note: "Show All" shows as many profiles as you're allowed to receive, which may increase that limit to 5000. But due to a database restriction, adding "one-to-many" fields to the profile list (next item), lowers the limit to 1000. Choosing HTML Import format,below, automatically sets "Show All".

Show the following fields in the profile list:

```
Name of Firm; Contact; Address and City, State Zip;
Capabilities Narrative; E-mail Address
```

Edit the columns to be displayed

Font Size (these usually affect all formats except HTML Import as text):

○ Tiny ○ Small ◉ Normal ○ Large ○ XLarge

Format. Show the search results in:

○ Table format

◉ HTML Export format
Save As...: ○ .text ◉ .xls (spreadsheet)
If importing into Windows Excel 2007 or later, answer Yes to the format/suffix dialog.

○ Mail-merge format
Delimiter: ◉ comma ○ comma and blank ○ tab

○ Vertical format (useful for mobile users)

Search Using These Criteria | Reset | Clear

#	Name of Firm	Contact	Address and City, State Zip
1	ECTRON CORP	KARY DODD	9340 HAZARD WAY SUITE B2 SAN DIEGO, CA 92123-1228
2	TETHER, INC.	JOHN ANDERSON	760 TALLEYRAND AVE JACKSONVILLE, FL 32202-1031
3	STREET LEGAL INDUSTRIES, INC	LISA BISESE	102A JEFFERSON CT OAK RIDGE, TN 37830-4821
4	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
5	ASP WEB SOLUTIONS LLC	JOHN HALBY	2959 ELMORE PARK RD STE 1 BARTLETT, TN 38134-8379
6	GENERAL MECHANICAL CORPORATION	CYNTHIA SHAW	418 N SEGRAVE ST STE B DAYTONA BEACH, FL 32114-3145
7	COLLINS CONSTRUCTION SERVICES, INC	DAWN MORGAN	2135 ROWLAND AVE SUITE C SAVANNAH, GA 31404-4422
8	ABC CONSTRUCTION COMPANY, INC.	KIMBERLY NUGENT	714 DUNKSFERRY RD BENSALEM, PA 19020-6514
9	NATIONAL OFFICE SYSTEMS INC	BRIAN ALVAREZ	6804 VIRGINIA MANOR RD BELTSVILLE, MD 20705-4200
10	L & L DRYWALL & CONSTRUCTION, INC.	DAVID LOCKLEAR	1617 GILLESPIE ST FAYETTEVILLE, NC 28306-1847
11	DOYON TECHNICAL SERVICES, LLC	ZACHEUS RITCHEY	3450 S 344TH WAY STE 100 FEDERAL WAY, WA 98001-5931
12	A & A FIRE AND SAFETY COMPANY, LLC	APRIL FORD-BRODERICK	4380 S 1ST ST CABOT, AR 72023-7420
13	ICE TECHNICAL SERVICES INC	CYNTHIA VANDEN BERG	11001 OMALLEY CENTRE DR STE 204 ANCHORAGE, AK 99515-3096
14	C. I. CONTRACTORS, INC.	STUART JACQUES	229 E WHITNEY RD ANCHORAGE, AK 99501-1616
15	MARRERO, COUVILLON & ASSOCIATES, L.L.C.	STACEY VINCENT	2644 S SHERWOOD FOREST BLVD STE 200 BATON ROUGE, LA 70816-2248
16	ALTIMA CONSTRUCTION INC	MERVIN MARTINEZ	2200 HUBBELL CIR SW ALBUQUERQUE, NM 87105-6666
17	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992

18	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404
19	AMERIND, INC.	JORDAN L BEARD	1301 WESTPARK DRIVE LITTLE ROCK, AR 72204-2412
20	JENNRAND DIVERSIFIED, L.L.C.	RANDY RANDOLPH	120 CHERRY ST TATUM, TX 75691-1927
21	AAECON GENERAL CONTRACTING LLC	MICHAEL LATHON	2509 PLANTSIDE DR LOUISVILLE, KY 40299-2529
22	ACCU-AIRE MECHANICAL LLC	MONICA HARRIS	1463 S WW WHITE RD SAN ANTONIO, TX 78220-3429
23	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
24	GUARDIAN CONSTRUCTION, INC.	DAVID POMA	360 SOUTH FORT LANE BLDG #1 , STE D LAYTON, UT 84041-5700
25	ASPHALT PLUS, INC.	MELINDA OEDEKOVEN	425 JOHNSON LN BILLINGS, MT 59101-6714
26	ALEXTON INCORPORATED	SOPHIA MARNELL	8210 CINDER BED RD STE 2 LORTON, VA 22079-1136
27	AMERICAN MAINTENANCE & SUPPLIES, INC	ARTURO GARCIA III	120 43RD ST UNION CITY, NJ 07087-6192
28	SQN SYSTEMS CORP	JOSEPH CONLEY	12060 OPEN RUN RD ELLICOTT CITY, MD 21042-6101
29	DOC DEVELOPMENT, INC.	RADCLIFF QUARTERMAN	2500 PARK CENTRAL BLVD STE A6 DECATUR, GA 30035-3925
30	NETWORK DESIGN TECHNOLOGIES INC	JOSEPH RUFFIN	1000 N WEST ST STE 1200 WILMINGTON, DE 19801-1058
31	LAKOTA SOLUTIONS LLC	MAURICE EVANS	315 LINCOLN ST STE 300 SITKA, AK 99835-7579
32	HANK FOSTER INC	ANDREA FOSTER	13 JULIA DR MANAHAWKIN, NJ 08050-3802
33	E-LOGIC, INC.	LUIS PADILLA	2000 PENNSYLVANIA AVE NW STE 7000 WASHINGTON, DC 20006-1921
34	OSPREY MANAGEMENT LLC	KELVIN KING	1640 POWERS FERRY RD BLD 26 STE 200 MARIETTA, GA 30067-
35	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	401 HANOVER ST FREDERICKSBURG, VA 22401-5936

36	ONEILL CONTRACTORS INC	KANEY ONEILL	4307 REGENCY DR GLENVIEW, IL 60025-5209
37	SECURITY WATCH INC	ARCHENA SHARMA	801 MYRTLE AVE STE 102 EL PASO, TX 79901-1599
38	IMPACT ELECTRIC SERVICES, LLC	JASON GARCIA	1495 TIERRA DEL SOL LAS CRUCES, NM 88007-5549
39	BIZSOLUTIONS 360 INC.	PETER NGANGA	1725 DESALES ST NW STE 600 WASHINGTON, DC 20036-4413
40	BRAD CONSTRUCTION CO II, LLC	JAMEEL HANIF	500 LANIER AVE W STE 801 FAYETTEVILLE, GA 30214-7642
41	GBTI SOLUTIONS INC	WENMING KUAI	659 NALLS FARM WAY GREAT FALLS, VA 22066-1147
42	INTERNATIONAL GLOBAL SOLUTION, CORP	CLARENCE LYLES	643 MASSACHUSETTS AVE STE 200 INDIANAPOLIS, IN 46204-1653
43	ATWOOD HAY INCORPORATED	GLENDA HAY	321 ALTA VISTA AVE ROSEVILLE, CA 95678-1701
44	JCD ENGINEERING, INC.	JUAN DEL PINO	ST 19 SUITE 1, LAS PALMAS VILLAGE CATANO, PR 00962-
45	TRI COAST CONSTRUCTION, LLC	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
46	JOHN CHRIS TAYLOR CONSTRUCTION & DESIGN LLC	JOHN TAYLOR	11 MARCY ST FREEHOLD, NJ 07728-2301
47	SMARTHOST DESIGN TECHNOLOGIES LLC	FEMI DADA	5523 RESEARCH PARK DR STE 245 CATONSVILLE, MD 21228-4680
48	CAYUSE TECHNOLOGIES, LLC	JONAS MOSES-CONNER	72632 COYOTE RD PENDLETON, OR 97801-1002
49	LCG, INC.	TOM MORTON	202 N 9TH ST STE 205A BOISE, ID 83702-5781
50	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
51	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
52	2R CONSTRUCTION LLC	ROMANO DILLARD	309 E UNION ST MINDEN, LA 71055-4603
53	SOUTH EASTERN GENERAL CONTRACTING, INC.	RALPHAEL LOCKLEAR	150 SQUARE LN SHANNON, NC 28386-9035
54	CHEROKEE NATION AEROSPACE AND DEFENSE, L.L.C.	JENNYLYNN GATES	470739 HIGHWAY 51 STILWELL, OK 74960-9194

55	HARBOR SERVICES, INC	SAMMY HICKS III	4930 RIVERS AVE NORTH CHARLESTON, SC 29406-6375
56	KELLY CONSTRUCTION SERVICES INC.	KELLY FISHER	55 MAIN ST STE 5102A ENFIELD, CT 06082-3359
57	UNIFIED CONTRACTOR, INC	IVAN SANTISTEVAN	304 INDIANA ST SE ALBUQUERQUE, NM 87108-3119
58	DIAMOND DISCS INTERNATIONAL, LLC	UGO NWAGBARAOCHA	9300 WEST HEATHER AVENUE MILWAUKEE, WI 53224-2425
59	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839
60	CLAYTON CO CONSULTANTS LLC	ANNIE CLAYTON	2033 FLESHER AVE JACKSONVILLE, FL 32207-3519
61	IMEC GROUP, LLC	GUDELL WARD	6470 DOBBIN RD STE B COLUMBIA, MD 21045-4767
62	GEC TRUCKING & CONSTRUCTION, INC	GENE CARTER SR	5885 RICHARD ST JACKSONVILLE, FL 32216-5968
63	WEST PACIFIC ELECTRIC COMPANY CORPORATION	VIRGINIA VILLA	290 EL PORTAL DR PISMO BEACH, CA 93449-1504
64	MULE ENGINEERING, INC.	JARED ULEKOWSKI	14136 HUTCHINSON ST WINTER GARDEN, FL 34787-5686
65	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
66	INVENTORY MANAGEMENT SOLUTIONS, LLC	SHERMAN POWELL	10505 PLAZA DR STE B WHITMORE LAKE, MI 48189-9156
67	SPR CONSTRUCTION CORP	PRITESH PATEL	90 STATE SREET STE 700 ALBANY, NY 12207-
68	GM BUILDERS INC	RUBEN GARCIA	6051 CALLE PICO GEMELO LAS CRUCES, NM 88012-8006
69	ADVANTIX ENGINEERING CORP	JOSE QUINONES	URB CAGUAX E14 AVE LUIS MUNOZ MARIN CAGUAS, PR 00725-3331
70	ALDEVRA LLC	RODNEY MARSHALL	5865 VENTURE PARK DR KALAMAZOO, MI 49009-1849
71	H.E.P. CONSTRUCTION, INC.	SAUD JABALI-NASH	1227 MARION BARRY AVE SE WASHINGTON, DC 20020-6907
72	FARMER CONSTRUCTION L.L.C.	WILLIE FARMER	3041 MCNAUGHTON DR STE F COLUMBIA, SC 29223-1832
73	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609
			7921 W BROAD ST # 127

74	MILLENNIUM ENTERPRISES, LLC	RAJ GOWDA	RICHMOND, VA 23294-6337
75	UNIVERSAL POWER CONVERSION INC	KAREN FIRLE	12467 BOONE AVE STE 1 SAVAGE, MN 55378-1283
76	BOB WALTERS JR CONSTRUCTION INC	BOB WALTERS	15000 7TH ST STE 202A VICTORVILLE, CA 92395-3852
77	CONSTRUCTURE INC	HARMAN RANGAR	13869 REMBRANDT WAY CHANTILLY, VA 20151-3259
78	PUENTE TECHNOLOGY LLC	DAVE GUERRA	514 PROGRESS DR LINTHICUM HEIGHTS, MD 21090-2214
79	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
80	CASCADE ENTERPRISES, INC	JOE HENDRICKS	8067 W MOSSY CUP ST BOISE, ID 83709-2852
81	GREENLAND CONSTRUCTION & ENGINEERING L.L.C.	ARIEL DIAZ	5440 NW 172ND ST MIAMI GARDENS, FL 33055-3966
82	D&S INTERNATIONAL, LLC	MARLENE CAMAN	5004 BRIGHTON AVE KANSAS CITY, MO 64130-3109
83	BRC CONSTRUCTION GROUP, LLC	BRYANT CARTER	3330 N CAUSEWAY BLVD STE 326 METAIRIE, LA 70002-3573
84	CLEAN WATER MECHANICAL AND CONSTRUCTION LLC	SHAUN ROBERSON	501 JOHN JAMES AUDUBON PKWY BUFFALO, NY 14228-1143
85	BRONZE OAK, LLC	BRENT PAGE	15800 S 193RD EAST AVE BROKEN ARROW, OK 74014-8054
86	CRUTCHO CREEK FARMS LLC	RAY WILLIAMS	6625 NE 10TH ST OKLAHOMA CITY, OK 73110-3339
87	WARFEATHER, LLC	JOHN OGLESBEE	10250 S 287TH EAST AVE COWETA, OK 74429-6414
88	ADELAIDE SERVICES LLC	SELENA ALEMAN	118 BROADWAY ST STE 614 SAN ANTONIO, TX 78205-2007
89	EACM CORP	SOLANGIE ARROYO	20 MERIDIAN RD STE 1 EATONTOWN, NJ 07724-2270
90	FRONTLINE SUPPORT SOLUTIONS, LLC	JOSE PEREZ	9504 N INTERSTATE 35 STE 204 SAN ANTONIO, TX 78233-6616
91	US ECO PRODUCTS CORP	DOREEN BLADES	143 ESSEX ST STE 210 HAVERHILL, MA 01832-5553
			4028 HAMILTON ST

92	MARK-VII ENTERPRISES, INC.	MARK SANTO	OMAHA, NE 68131-1106
93	TURNER & TURNER CONTRACTING, LLC	AL TURNER	3600 JACKSON ST STE 172 ALEXANDRIA, LA 71303-3064
94	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
95	MEDVED GLOBAL INC	MICHELLE HICKS	24363 ROAD L CORTEZ, CO 81321-8805
96	GOSHAWK, LLC	BRANDON MANN	5575 TECH CENTER DR STE 217 COLORADO SPRINGS, CO 80919-2392
97	BLASCO CONSTRUCTION CORP	VIVIAN BLASCO	4265 NW 37TH AVE MIAMI, FL 33142-4243
98	BATIR ARCHITECTURE LTD	PAULA PRICE	1121 E MAIN STREET SAINT CHARLES, IL 60174-2205
99	DACAMA, LLC	DAVID SAUCEDO	711 N COPIA ST EL PASO, TX 79903-4405
100	HOLMES MECHANICAL CONTRACTORS, LLC	RENEE HOLMES	8900 EDGEWORTH DR UNIT D CAPITOL HEIGHTS, MD 20743-3734
101	JCJ CHAVEZ CONSTRUCTION INC	MARILUPE CHAVEZ	115 S GOLD CANYON ST RIDGECREST, CA 93555-4121
102	M&K GENERAL CONTRACTORS INC	KARLA FRESE	1368 WOODEN VALLEY ST CHULA VISTA, CA 91913-2936
103	NS & ASSOCIATES, LLC	MEREDITH SMITH	19512 CAMERON MILL RD PARKTON, MD 21120-8910
104	MBG INTEGRATED SOLUTIONS L. L. C.	MARK BRAILSFORD	305 PEACEFUL WAY FAYETTEVILLE, GA 30214-8403
105	ABHZEEN DESIGN INC	BHAVESH NAIK	34 SCHOOL RD E MARLBORO, NJ 07746-2056
106	PARSCO, LLC	AMIR FOOLADI	700 N DE VILLIERS ST PENSACOLA, FL 32501-3819
107	SERVITECH, INC.	JIM BARKER	13892 E SMITH DR AURORA, CO 80011-2248
108	ACTS GROUP, INC.	MILTON TORRES	1136 JENSEN DR STE A VIRGINIA BEACH, VA 23451-5872
109	K WATSON GROUP LLC	KAREN WATSON	10834 OLD MILL RD STE 4 OMAHA, NE 68154-2648
110	RYMARC CONSTRUCTION INC	BRUCE LOPEZ	3440 PRINCETON DR NE STE 217 ALBUQUERQUE, NM 87107-2028

111	QUINCON INC.	JOSE QUINTANA	200 S 13TH ST STE 101 GROVER BEACH, CA 93433-2262
112	ESSNOVA SOLUTIONS, INC.	SRIDHARA GUTTI	1500 1ST AVE N UNIT 47 BIRMINGHAM, AL 35203-1873
113	FOUR WINDS MECHANICAL HTC/AC INC.	CHAULING ARMIJO	8915 ADAMS ST NE STE B ALBUQUERQUE, NM 87113-2714
114	CASCADE SORBENT PRODUCTS INC	AL MARTINA	500 ALA MOANA BLVD STE 7400 HONOLULU, HI 96813-4902
115	BGESH INCORPORATED	WESTON HALLIBURTON	21943 DIAMOND CHASE STE 200 SAN ANTONIO, TX 78259-2743
116	BRIGGS BROTHERS ENTERPRISES CORP	TERRY BRIGGS	4749 SANSOM ST PHILADELPHIA, PA 19139-4633
117	SOL CONTRACTORS INC.	CESAR LOYA	14001 MONTANA AVE EL PASO, TX 79938-7241
118	SIERRA PACIFIC FENCE, INC.	STEVE RODRIGUEZ	2240 HUTCHISON ST VISTA, CA 92084-2529
119	INFRABUILDERS, LLC	CARLOS PINERO	111 CALLE CIELO RUBI VEGA ALTA, PR 00692-8813
120	A-1 ANHERMA, LLC	ANDRES BECERRA	100 SE 2ND ST MIAMI, FL 33131-2100
121	DK CLEANING CONTRACTORS LLC	CHIDOZIE DIKE	1517 EDGMONT AVE STE 1F CHESTER, PA 19013-5322
122	LAURA KAY DUNBAR, INC.	LAURA DUNBAR	394 E MAIN ST STE 201 VENTURA, CA 93001-4961
123	BARON COMMUNICATIONS INCORPORATED	LAFAYETTE TATEM	850 39TH ST STE 102 NEWPORT NEWS, VA 23607-3171
124	GRANITE COMMERCIAL REAL ESTATE LLC	MEGAN PRIETO GIOKAS	30 TEMPLE ST STE 300 NASHUA, NH 03060-2412
125	EARTHTEK BUILDERS	SAE JOON OH	2707 W 230TH PL TORRANCE, CA 90505-3141
126	R.T CONTRACTOR CORP.	TAMMY PHAN	11531 SALINAZ AVE GARDEN GROVE, CA 92843-3702
127	TIGUA CONSTRUCTION SERVICES, INC	KRIS WEIMERSKIRCH	12 LEIGH FISHER BLVD EL PASO, TX 79906-5239
128	SKINNER DEVELOPMENT INC	LOUIS SKINNER III	1705 ENTERPRISE WAY SE STE 200 MARIETTA, GA 30067-9224
			2026 S CALLAGHAN RD

129	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	SAN ANTONIO, TX 78227-2265
130	NEW DOMINION CONSTRUCTION LLC	ADRIAN LAWSON	2525 POINTE CENTER CT STE 100 DUMFRIES, VA 22026-2277
131	THE PLUMBING SHOP, INC	PERIDOT DAVIS	1121 FLAMINGO DR AUSTELL, GA 30168-6109
132	CINTEOT INC.	CHRISTINA HUNT	75 S MAIN ST CHAMBERSBURG, PA 17201-2224
133	SANDOW CONSTRUCTION INC	KASMERA SANTIAGO-DOWNEY	4300 48TH ST BLADENSBURG, MD 20710-1108
134	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
135	3T-INNOVATIONS, LLC	FRANCISCO VALENCIA	905 E MARTIN LUTHER KING JR DR STE 130 TARPON SPRINGS, FL 34689-4800
136	BENECORP INC	CARTER BENEFIELD	1822 15TH ST STE 14 GULFPORT, MS 39501-2104
137	PROSPERITUS SOLUTIONS LLC	KRYSTAL NERIO	1014 PEABODY AVE SAN ANTONIO, TX 78211-2844
138	ASPIRYON LLC	NEIL CRISMAN	7600 CHEVY CHASE DR SUITE 300 AUSTIN, TX 78752-1599
139	MINATOISHI PALUMBO ARCHITECTS, INC.	LORRAINE MINATOISHI	1003 BISHOP ST STE 1975 HONOLULU, HI 96813-6461
140	ETOLIN STRAIT DEVELOPMENT GROUP LLC	JAMIE VANEK	236 W 10TH AVE STE 100 ANCHORAGE, AK 99501-3638
141	TOOLS MAN, INC., THE	LUIS DEGREGORIO	5500 SW 48TH ST SUITE B DAVIE, FL 33314-4506
142	JOURNEY STEEL, INC.	BARBARA SMITH	7660 PRODUCTION DR CINCINNATI, OH 45237-3209
143	FRONT RANGE CONSTRUCTION INC	ALBERT ROGERS	3730 SINTON RD STE 211 COLORADO SPRINGS, CO 80907-5075
144	L2 DEFENSE INC	SAMUEL LENNON	12 IRONDALE ST STE 126 BALTIMORE, MD 21220-2172
145	JD BRAVO CO INC	JAMES DAVIE	136 PENNSYLVANIA AVE MALVERN, PA 19355-2418
146	SUSTECH LLC	ANGEL VAZQUEZ	CARR 848 KM 0 5 CALLE ALFA SAINT JUST TRUJILLO ALTO, PR 00976-

147	TAKOTA FLATS, LLC	WAYNE LOPEZ	35734 PARKLAWN CT ROUND HILL, VA 20141-4414
148	MARCO AMERICA CORP	AURELIO JAIMES	20 MANSFIELD RD PISCATAWAY, NJ 08854-1951
149	REON INC	MATT PERRY	14502 GREENVIEW DRIVE STE 300 LAUREL, MD 20708-3287
150	BLUE SPADER CONTRACTORS INC	BILLY COLLINS	332 S MAIN ST STE A ROMEO, MI 48065-5197
151	HANA TECHNOLOGIES & SYSTEMS, INC.	TROY COOPER	1099 ALAKEA ST STE 2520 HONOLULU, HI 96813-4524
152	MATT L. GUINN CONSTRUCTION, LLC	MATT GUINN	1716 INDUSTRIAL RD JENNINGS, LA 70546-3155
153	COGENT RESOURCES INC	JANE LEE	8616 BRICKYARD ROAD ROCKVILLE, MD 20854-1708
154	DUWRIGHT CONSTRUCTION INC	JOSEPH PEREIRA	7902 RAYTHEON RD SAN DIEGO, CA 92111-1607
155	ARGUS SERVICES INC	MONIKA SYAL	6363 AMBER LN GRAND BLANC, MI 48439-7818
156	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
157	MA-CHIS INTERNATIONAL SERVICES, INC.	NADINE SCHLOEMER	2948 COUNTY ROAD 377 ELBA, AL 36323-7088
158	COUNTY WELDING, LLC	TREVOR RAMOUTAR	15873 COMMERCE CT UPPER MARLBORO, MD 20774-7412
159	CIN-G CONTRACTING LLC	CINDY GONZALES	5285 W LOUISIANA AVE LAKEWOOD, CO 80232-5938
160	SHIVOY INC.	DANISH NAGPAUL	19440 GOLF VISTA PLZ STE 310 LEESBURG, VA 20176-8264
161	NICHOLS CUSTOM BUILDERS & DESIGN, INC.	KWESI NICHOLS	9816 EMERALD POINT DR UNIT 9 CHARLOTTE, NC 28278-6536
162	OFFICE DESIGN SOLUTIONS, LLC.	TRACEY BROWN	294 SOWELL RD MCDONOUGH, GA 30252-2986
163	CO SABINO CORP	VALENTINE VERISSIMO	301 E SILVER FOX RD NEWARK, DE 19702-1455
164	HUGH AND ASSOCIATES INC	VICTOR GILKES	1928 BENNING RD NE # 2 WASHINGTON, DC 20002-4724
			7060 S YALE AVE STE 707

165	UNAMI LLC	LAURA PONDER	TULSA, OK 74136-5717
166	POLK & ASSOCIATES CONSTRUCTION INC	REGGIE POLK	229 WARD CIR STE C22 BRENTWOOD, TN 37027-7597
167	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
168	A AND W ELECTRICAL AND REFRIGERATION A/C INC	WILBERTO ROSARIO	CARR. 155 KM 55.4 URB. ALIANZA, CALLE AZUCENA, BARRIO BARAHONA MOROVIS, PR 00687-
169	GREENSTONE CONSTRUCTION, INC.	JUSTIN LINDTEIGEN	2631 12TH AVE S STE B FARGO, ND 58103-8741
170	FG MANAGEMENT GROUP LLC	FRITO GEFFRARD	40 BROWN AVE SPRINGFIELD, NJ 07081-2902
171	PEAK ELECTRIC, INC.	MILTON MCINTYRE	320 NORTH BYRNE RD TOLEDO, OH 43607-2607
172	HD INC.	JANET HURLEY	6391 AVIATION CIR LOVELAND, CO 80538-9000
173	MILLER ELECTRIC COMPANY INC.	ANNABELLE MILLER	3945 GLEN ST RENO, NV 89502-4966
174	ARROWHEAD GLOBAL LLC	CHAD HILL	22033 US HIGHWAY 19 N CLEARWATER, FL 33765-2362
175	PREMIER MECHANICAL PRODUCTS LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314
176	LUMBEE RESOURCE MANAGEMENT GROUP LLC	JOHNNY HELMS	6440 SOUTHPOINT PKWY STE 300 JACKSONVILLE, FL 32216-8003
177	DRIVEN CONTRACTORS LLC	JOSEPH LOOCKLEAR	701 W DR MARTIN LUTHER KING JR DR MAXTON, NC 28364-1246
178	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
179	MSAB, LLC	LAURA KNIGHT	400 PERRY PKWY PERRY, GA 31069-9246
180	DARBONNIER TACTICAL SUPPLY LLC	BRITTNI DARBONNIER	951 NE 21ST CT OAK HARBOR, WA 98277-2715
181	CHEROKEE NATION ENVIRONMENTAL SOLUTIONS, L.L.C.	JENNYLYNN GATES	2 W 2ND ST STE 1500-24 TULSA, OK 74103-3123
182	LG CONSTRUCTION INC	DARRYL LEIJA	636 BROAD ST APT 107 PERRYVILLE, MD 21903-2814
183	MIG GOV, LLC	JOSE GUTIERREZ	1385 LASKIN RD VIRGINIA BEACH, VA 23451-6000
			56851 GRATIOT AVE

184	SAWYER SERVICES INC	KIM SAWYER	CHESTERFIELD, MI 48051-1308
185	GULF REMEDIATION, INC	JOSE TORRES	6649 NORTHDALE ST HOUSTON, TX 77087-6423
186	SWEAT US LLC	AUSTIN SWEAT	4124 LAZY BREEZE LN MILTON, FL 32583-2483
187	BEST VALUE MANAGEMENT, LLC	BRENDA CAMPBELL	1225 W BEAVER ST STE 12306 JACKSONVILLE, FL 32204-1414
188	CREATIVE MANAGEMENT PARTNERS, LLC	CRAIG GORHAM	201 W MAIN ST STE 100 DURHAM, NC 27701-3228
189	MATTHIS CONSTRUCTION COMPANY, INC.	CARLTON MCGRIFF	1416 CLAUDIA SPENCER STREET JACKSONVILLE, FL 32206-2516
190	SANALIL CONSTRUCTION INC	ARMON RAHMANKHAH	8400 N UNIVERSITY DR STE 310 TAMARAC, FL 33321-1713
191	NATIVE AMERICAN INDUSTRIAL SOLUTIONS LLC	JENNIFER CHAPMAN	14323 OCEAN HWY UNIT 4119 PAWLEYS ISLAND, SC 29585-4817
192	TEKSOL INTEGRATION GROUP INC	MIGUEL GONZALEZ	CARR 64 KM 4.3 BO SABANETAS MAYAGUEZ, PR 00680-
193	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
194	RIZA CONSTRUCTION INC	COREY AVENS	228 CHAPARRAL TRL JACKSONVILLE, NC 28546-9407
195	JIMENEZ MASONRY CONTRACTOR INC	DAGOBERTO JIMENEZ	6836 TUSTIN RD SALINAS, CA 93907-8571
196	THG COMPANIES LLC	CHEO HURLEY	2031 CLIPPER PARK RD STE 107 BALTIMORE, MD 21211-1490
197	PLUG IN UTILITY SERVICES CORP	KELVIN COLON	URB LEVITTOWN 1178 AVE DOS PALMAS TOA BAJA, PR 00949-4102
198	QA ENGINEERING LLC	JON ANTHONY	1409 ORTIZ DR SE ALBUQUERQUE, NM 87108-5577
199	PRIME MASONRY, LLC	JACINTO TAMEZ	2212 PRIMROSE AVE STE E MCALLEN, TX 78504-4161
200	INDIAN CREEK CONSTRUCTION, LLC	AL HANEY	211 6TH AVE SOUTH NAMPA, ID 83651-3746
201	US WEST CORP	BRANDON EVERETT	1390 N OLD PACIFIC HWY MYRTLE CREEK, OR 97457-9353
	DREAM DESIGN & CONSTRUCTION,		1101 IDLEWILD AVE

202	INC	LEANN WILKES	GREEN COVE SPRINGS, FL 32043-3903
203	OCS CONSTRUCTION SERVICES INC	MARK VACA	3664 ELIZABETH ST RIVERSIDE, CA 92506-2506
204	IKERD CONSULTING, LLC	BRENDA IKERD	10000 N CENTRAL EXPY STE 400 DALLAS, TX 75231-4180
205	ALPHA DEMOLITIONS , INC	ANTONIO MEDINA	URB MANSIONES REALES E-36 CALLE PASEO DE LA REINA GUYANABO, PR 00969-
206	RICO'S PUMP SERVICE & ELECTRIC MOTOR REPAIR LLC	ENRIQUE MONTIEL-OCHOA	520 MCCHESNEY AVE EXT TROY, NY 12180-8839
207	ML CONSTRUCTION INC	KISINA NEIUFI	503 W 100 S SPRINGVILLE, UT 84663-4964
208	BLOOMSBURIE LLC	KINHA LESTER	3542 N UTAH ST ARLINGTON, VA 22207-4444
209	CAPITAL COLORS, LLC	VERNON RAMEY	9611 COTTRELL TER SILVER SPRING, MD 20903-2229
210	VIRSIG, LLC	BRIAN VALENZA	95 SEAVIEW BLVD STE 201 PORT WASHINGTON, NY 11050-4633
211	THE SPARROW GROUP INC	DAVID WIEGAND	3620 WYOMING BLVD NE STE 230 ALBUQUERQUE, NM 87111-3297
212	SUCCESS BY DESIGN LLC	ERIC AGOSTO	8655 CHERRY LN LAUREL, MD 20707-6201
213	K2 CONTRACTING GROUP, LLC	STEVEN NAPPER	9501 DISCOVERY BLVD STE 105 MANASSAS, VA 20109-4031
214	DLJ MANAGEMENT SERVICES, LLC	DANIEL JAMES	4801 E MCDOWELL RD UNIT 210 PHOENIX, AZ 85008-7725
215	VANGUARD PACIFIC LLC	SYDNEY CODY	14051 COUNTY ROAD 9 FOLEY, AL 36535-8318
216	ONE TOUCH BUILDING MAINTENANCE LLC	JULIAN CLAYBOURNE	221 N 18TH ST KANSAS CITY, KS 66102-4916
217	ADAPT CONSULTING LLC	LISA LOWERY	598 REDWOOD RD SARATOGA SPRINGS, UT 84045-9603
218	HANA ENGINEERS & CONSULTANTS LLC	HYUNG-JUN KIM	6800 PARAGON PL STE 112 RICHMOND, VA 23230-1658
219	ABBA CONSTRUCTION, LLC	JACOB FLORES	8502 SPRING VALLEY CIR LAREDO, TX 78045-8410
	ARCHWAY SOLUTIONS LIMITED		45 CR 1110

220	LIABILITY COMPANY	ARCH STEPHENS	TROY, AL 36079-4607
221	BRIGHT REGARDS, LLC	YVONNE HERRERA	70 INDUSTRIAL PARK DR STE 3E WALDORF, MD 20602-3739
222	AXE ENGINEERING INC	TODD KIRKPATRICK	3003 SIOUX ST NW ALBUQUERQUE, NM 87107-1048
223	JIM JAM, INC.	JAMES GALLET	11003 W 59TH TER SHAWNEE, KS 66203-2956
224	SECURITY OPERATIONS GROUP INTERNATIONAL LLC	LUIS ARELLANO	428 HAVASU PT SPRING BRANCH, TX 78070-5522
225	GRENLAR HOLDINGS, INC	KALEN GRENZEBACH	16636 SIMONDS RD NE KENMORE, WA 98028-4413
226	A3 SYSTEMS CORPORATION	AUBREY HINDS	2101 OLD BERMUDA HUNDRED RD CHESTER, VA 23836-5505
227	5 SEASONS MECHANICAL LLC	TONYA HALL	6971 PEACHTREE INDUSTRIAL BLVD STE A PEACHTREE CORNERS, GA 30092-5718
228	MIA GENERAL CONTRACTING LLC	BRANDY DODD	4221A HIGHWAY 90 MILTON, FL 32571-2011
229	MX CONSTRUCTION, INC.	TIFFANY AMEZCUA	720 S FRONTAGE RD STE 106 NIPOMO, CA 93444-5626
230	SH MECHANICAL INC.	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
231	DRAKE DEVELOPERS LLC	DAVID ROYSTER	1340 RIETVELD ROW ATLANTA, GA 30318-4109
232	G TECH CONTRACTING, LLC	AGUSTIN NUNEZ	8008 DORADO TER # G BRANDYWINE, MD 20613-5809
233	MIWOK CONSTRUCTION LLC	JEFF HINDERS	3301 N BUFFALO DR STE 120 LAS VEGAS, NV 89129-7450
234	GUSTAV KEONI	ERIK WRIGHT	181 BONETTI DR SAN LUIS OBISPO, CA 93401-7310
235	VALCORP ENTERPRISES LLC	JASON PETRAS	4101 MURRAY AVE HALTOM CITY, TX 76117-1714
236	SOLVED ENGINEERING INC.	EDWARD WILLIAM	1223 CLEVELAND AVE STE 200 SAN DIEGO, CA 92103-3301
237	RADUS TEK SERVICES INC	SANGEETA G	120 OLD CAMPLAIN ROAD STE 2D HILLSBOROUGH, NJ 08844-4394
238	CHENEGA MISSION OPERATIONS, LLC	DAVID O'REAR	5253 PRUE RD STE 230 SAN ANTONIO, TX 78240-1759

239	CONSULTANTS AND COUNSELING SERVICES LLC	ROCHELLE ROBYN AGUILAR	8005 PENNSYLVANIA CIR NE ALBUQUERQUE, NM 87110-7847
240	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	404 HAUPT SQ SE LEESBURG, VA 20175-2722
241	KALVIO LLC	JONATHAN VANNATTA	2800 WOODLAWN DR STE 299 HONOLULU, HI 96822-1882
242	AMERISTAR CONTRACTING GROUP, INC.	MANUEL COTELO	1 MEMORIAL DRIVE STE 101 WARETOWN, NJ 08758-1762
243	SES ENERGY SERVICES LLC	JOHN MORRISON	10101 GLOBAL WAY KNOXVILLE, TN 37932-3422
244	ACCURA ELECTRICAL CONTRACTOR INC	MANUEL BARRERA	6187 NW 167TH ST STE H3 HIALEAH, FL 33015-4301
245	24HRC	BOBBY AMEEN	47 TESLA # 200 IRVINE, CA 92618-4669
246	CAROLINA GROUP PROPERTIES LLC	RONALD JAMES	701 S GEORGE ST STE 2 GOLDSBORO, NC 27530-5717
247	TMPC INC	JOE TEASLEY	5706 S MACDILL AVE STE 102 TAMPA, FL 33611-4449
248	AYKO GROUP LLC	CHRISTOPHER LEE	1024 SAND ISLAND PKWY UNIT A HONOLULU, HI 96819-4345
249	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	504 CAPITAL CIR SE STE A TALLAHASSEE, FL 32301-3807
250	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
251	Z SQUARED BUILDERS INC.	LOURDES MALAEKEH	5039 ROBERT J MATHEWS PKWY # 400 EL DORADO HILLS, CA 95762-5752
252	CLARK CREATIVE SOLUTIONS LLC	CRAIG WELLS	201 N CHARLES ST STE 1910 BALTIMORE, MD 21201-4123
253	RGON CORP	ROGER GONZALES	6225 NORCHESTER DR CORPUS CHRISTI, TX 78415-3926
254	VENUS SUPPLIES & SERVICES LLC	THERESA GIRIFALCO	3770 RIDGE PIKE STE 2B COLLEGEVILLE, PA 19426-3170
255	CHEROKEE NATION MECHANICAL LLC	JENNYLYNN GATES	2 W 2ND ST STE 1500-30 TULSA, OK 74103-3123
			783 W MYSTIC CREEK WAY

256	APEX ENGINEERING GROUP INC	MARCELO ESPINEL	SOUTH JORDAN, UT 84095-4691
257	TOOLS MAN, INC., THE	LUIS DEGREGORIO	1951 NW 141 ST BAY 11 OPA LOCKA, FL 33054
258	JASPER STEWARD, LLC	NANCY STEPHENSON	6841 MIRAMAR PKWY MIRAMAR, FL 33023-6023
259	QCM, INC.	SURESH PENDEM	25890 RAWLEY SPRINGS DR CHANTILLY, VA 20152-5767
260	TIGUA FACILITY SERVICES, INC.	KRIS WEIMERSKIRCH	12 LEIGH FISHER BLVD EL PASO, TX 79906-5239
261	GWO, INC.	MIRION GREEN	832 CAMBRIDGE AVE MATTESON, IL 60443-1855
262	FLATWATER, INCORPORATED	ERIN MORGAN	818 ST. AUGUSTINES DRIVE WINNEBAGO, NE 68071-5167
263	TERA CONSULTING INC.	KHURRAM BAJWA	29 ELVES LN LEVITTOWN, NY 11756-5522
264	DOFINE SPRINKLER REBUILDERS INC	DALLES DUFFIN	218 W 13TH ST BURLEY, ID 83318-1602
265	LD SUPPLY, LLC	LISA D'ALESSIO	925 HALE PL STE A6 CHULA VISTA, CA 91914-3507
266	SOLID GROUND, LLC	JOEL HARRIS	920 CHESTER LN KAYSVILLE, UT 84037-4212
267	EMPOWER CONTRACTING INC.	YOLANDA VALDES	1361 BROOKLYN BLVD BAY SHORE, NY 11706-4008
268	WYANDOTTE TECHNOLOGIES	NEIL SPENSER	15 TURTLE DR WYANDOTTE, OK 74370-2105
269	REVOLUTION MACHINE TOOLS, INC.	SHAUN WYLLIE	385 N 700 W NORTH SALT LAKE, UT 84054-2726
270	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
271	GLOBAL QUALITY SOLUTIONS, INC.	ADRIANA BLANKENSHIP	7235 BENTLEY RD STE 930 JACKSONVILLE, FL 32256-7565
272	STG PACIFIC, LLC	ROBERT CHAMPION	3700 CENTERPOINT DR STE 8155 ANCHORAGE, AK 99503-5800
273	NISOU ENTERPRISES INC	NIHARIKA SHASTRI	37279 ASPEN DR FARMINGTON HILLS, MI 48335-5479
274	THE IMPACT GROUP LLC	SULAIMAN HARRIS	3102 35TH ST NE WASHINGTON, DC 20018-1628
			3201 C ST

275	MIDNIGHT SUN GLOBAL SERVICES LLC	JOHNNY JEPPESEN	STE 801 ANCHORAGE, AK 99503-3934
276	A. JAMES GLOBAL SERVICES, INC	DINO JAMES	1000 SAINT ANDREWS RD STE C COLUMBIA, SC 29210-3103
277	GULF COAST SOLUTIONS LLC	YVETTE BREAZEALE	12300 BIG CREEK RD GULFPORT, MS 39503-7306
278	SAFECO INC	KEVIN BLOUNT	1761 CHURCH ST STE 107 NORFOLK, VA 23504-2313
279	TDX POWER SERVICES LLC	LOREN JALBERT	4501 S BANNER ST BOISE, ID 83709-5521
280	HAIDS PLUMBING & HEATING	JOHN HAID	1105 FALCON ST MILLS, WY 82644-
281	MASHIMA ELECTRIC LLC	KATHRYN MASHIMA	91-1012 IPOLANI ST APT A KAPOLEI, HI 96707-3062
282	GC WORKS INC	LANCE WAYNE	1820 SW 3RD AVE MIAMI, FL 33129-1417
283	COX-MORGAN & ASSOCIATES, LLC	DONETH MORGAN	6015 CHESTER CIR STE 202 JACKSONVILLE, FL 32217-2273
284	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
285	SHEDRICK ENTERPRISES LLC	DEREK SHEDRICK	507 TRELLIS TRL CHESAPEAKE, VA 23320-4200
286	EVANS ENGINEERING AND CONSULTING PLLC	DONALD EVANS	1810 E SCHNEIDMILLER AVE STE 221 POST FALLS, ID 83854-7989
287	RED HERITAGE MEDIA LLC	RONNIE BECK	996 AVENUE OF THE NATIONS ROCK HILL, SC 29730-7645
288	ALETO, INC.	LUIS VIERA	1440 N EDGEWOOD ST STE 178 ARLINGTON, VA 22201-7037
289	NATIVE STAR GROUP, INC	JOSH PETERSON	17406 E 425 RD JAY, OK 74346-3735
290	RDZ CONTRACTORS, INC.	PEDRO RODRIGUEZ	230 W TEFFT ST NIPOMO, CA 93444-8848
291	ANDERSON & SONS CONTRACTING LLC	DEON ANDERSON	1109 HILLSWICK LANE RAYMORE, MO 64083-9030
292	CCCS INTERNATIONAL LLC	CALVIN WHITFIELD	3436 RIVERS AVE NORTH CHARLESTON, SC 29405-7743
			1005 N POINT BLVD STE 706

293	AMERICAN VET INDUSTRIES, LLC	LEONARDO PENA	BALTIMORE, MD 21224-3402
294	ICE TECHNICAL SERVICES INCORPORATED	CYNTHIA VANDEN BERG	30713 RIVERSIDE DR STE 204 LAKE ELSINORE, CA 92530-4714
295	NVE LLC	RODNEY PATANE	11507 N 6090 W HIGHLAND, UT 84003-3749
296	PREMIUM PRODUCTS OF LOUISIANA, INC.	ANDREA DAVIS	1813 BERTRAND DR LAFAYETTE, LA 70506-2056
297	HOLLOWAY CONSTRUCTION, INC	BRANDON HOLLOWAY	13101 13TH RD W HANFORD, CA 93230-9666
298	KOPACZ BOYER DESIGN BUILD SERVICES LLC	JOSEPH KOPACZ	879 OAK HILLS DR MONUMENT, CO 80132-8829
299	DESIGNTEK CONSULTING GROUP LLC	FRED SAKAKI	746 E WINCHESTER ST STE 220 SALT LAKE CITY, UT 84107-8513
300	CAPITAL BRAND GROUP LLC	MAX BRAND	6600 VIRGINIA MANOR RD BELTSVILLE, MD 20705-1255
301	MAKRO CORP.	LAURA GONZALEZ	1761 CARR 8838 SAN JUAN, PR 00926-2741
302	ICE TECHNICAL SERVICES INC	CYNTHIA VANDEN BERG	1010 W 24TH AVE BELLEVUE, NE 68005-3912
303	NV SERVICES LLC	NEYSSA VARELA	URB. LAS LOMAS BLOQUE U3 #3 SAN JUAN, PR 00921-
304	SANTA & CO CORP	YDARMIE SANTA	2 KM 62 1 BO CANDELARIA GARROCHALES, PR 00652
305	REASOR BUILDING GROUP LLC	TED HAMILTON	7100 PLANTATION ROAD STE 11 PENSACOLA, FL 32504-6234
306	REALTIME TECHNICAL SOLUTIONS LLC	DERRICK LEVRONEY	42060 MANSFIELD PARK CT CHANTILLY, VA 20152-6424
307	MIKOCORP LLC	MATTHEW LINDSEY	1832 B RANGER HWY WEATHERFORD, TX 76088-9138
308	KOMAN INTEGRATED SOLUTIONS, LLC	RUSSELL BORMAN	2700 GAMBELL ST STE 401 ANCHORAGE, AK 99503-2833
309	RNN ARCHITECTS, INC	REBECA ARISTIZABAL	2930 S WOLFF ST DENVER, CO 80236-2013
310	POTAWATOMI DEFENSE OPERATIONS LLC	AARON FINNIGAN	3215 W STATE ST STE 309C1 MILWAUKEE, WI 53208-3364
			400 W TUDOR RD STE A400

311	MTNT TECHNICAL SERVICES, LLC	ERIC REEVES	ANCHORAGE, AK 99503-6652
312	CARDINAL STATE CONSTRUCTION LLC	KERRY ADAMS	4751 BEST RD STE 400L ATLANTA, GA 30337-5609
313	CONTRACTING & COMMUNICATIONS SERVICES, INC.	GINA TYSHING	107 ENGLEFIELD DR GAITHERSBURG, MD 20878-2661
314	DFW CAD SERVICES LLC	SHAWN MANSELL	747 SEETON RD MANSFIELD, TX 76063-6902
315	AVCOR CONSTRUCTION, LLC	AMANDA POWERS	10684 HIGHWAY 319 AUSTIN, AR 72007-9485
316	T1 CONSTRUCTION LLC	ERIK SELL	3201 TREMONT ST NORTH BEND, OR 97459-3062
317	ENVIRONMENTAL CONSTRUCTION SERVICES INC.	MICHAEL BROWN	3751 ISLAND AVE STE 205 PHILADELPHIA, PA 19153-3237
318	ANA GENERAL CONTRACTORS LLC	RAJIV PATEL	9514 MARYLAND AVE LAUREL, MD 20723-1838
319	DATUM CONSTRUCTION LLC	AMANDA JANSEN	9777 W CHINDEN BLVD 300 GARDEN CITY, ID 83714-2008
320	SUPERIOR STRUCTURES LLC	JOSHUA BOWEN	113 HOWARD ST LA PLATA, MD 20646-6949
321	ON-DEMAND SERVICES LLC	LANRE LANRE	18045 W LITTLE YORK RD KATY, TX 77449-7264
322	BUCKET PRO LLC	CHEYENNE BROOKS	1898 BUFFALO ST OLEAN, NY 14760-1142
323	VAQUEROS ELECTRICAL, LLC	OTHON RUIZ	424 W ANSLEY ST SAN ANTONIO, TX 78221-3101
324	BCP PARTNERS, L.L.C.	JULIO ARANA	1097 BERT ST LA PLACE, LA 70068-5301
325	SES ENERGY SERVICES LLC	JOHN MORRISON	111 W 16TH AVE STE 415 ANCHORAGE, AK 99501-5169
326	AMERICAN MARINE & TECHNICAL SERVICES LLC	MAURICE EVANS	315 LINCOLN ST STE 300 SITKA, AK 99835-7579
327	SES ENERGY SERVICES LLC	JOHN MORRISON	10815 GULFDALE ST STE 8 SAN ANTONIO, TX 78216-3608
328	DV SOLUTIONS LLC	DERRICK SURRATT	120 E WASHINGTON ST CAMDEN, AR 71701-4010
329	IDEAL CONSTRUCTION SERVICES INC	STEVEN PRESCOTT	200 CLAY ST WESTON, MO 64098-1014

330	DBRA CONSTRUCTION, LLC	DERAGE ALEMAYEHU	9421 WOODED GLEN AVE BURKE, VA 22015-4231
331	SNODGRASS CONTRACTING LLC	JEFF SNODGRASS	1910 TOWNE CENTRE BLVD STE 250 ANNAPOLIS, MD 21401-3599
332	BLUE CONSTRUCTION SERVICES LLC	SEPTEMBER BLUE	633 YORK LN SE LEESBURG, VA 20175-4017
333	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
334	WEBMYERS CONSTRUCTION, LLC	CHONDRA MYERS	180 INTERSTATE NORTH PKWY SE STE 125 ATLANTA, GA 30339-6606
335	GREENCLEAN, INC.	MAXIMILIAN VU	6399 LITTLE RIVER TPKE STE 300 ALEXANDRIA, VA 22312-5093
336	TYONEK CONTRACTOR SERVICES, LLC	STEPHEN PESKOSKY	880 H ST STE 210 ANCHORAGE, AK 99501-3450
337	GOSHAWK, LLC	BRANDON MANN	1600 GENESSEE ST STE 728 KANSAS CITY, MO 64102-1039
338	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	615 BARONNE ST STE 205 NEW ORLEANS, LA 70113-1016
339	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	4203 WOODCOCK DR STE 265 SAN ANTONIO, TX 78228-1312
340	ALL ABOVE LLC	CARL DEAN	8 WESTBURY DR BERLIN, NJ 08009-9682
341	Imec Group, Llc	Gudell Ward	1299 PARKWAY DR GOLDSBORO, NC 27534-3486
342	TM SERVICES AND CONSULTANTS, LLC	TIMOTHY BURNSIDE	2437 E SUNNY MEADE DR HARVEY, LA 70058-2140
343	MIDNIGHT SUN GLOBAL SERVICES LLC	JOHNNY JEPPESEN	1577 SPRING HILL RD STE 320 VIENNA, VA 22182-2446
344	MIDNIGHT SUN GLOBAL SERVICES LLC	NEIL MILLER	4500 ROCKSIDE RD INDEPENDENCE, OH 44131-2131
345	B3 CONSTRUCTION, INC	ANDREW BEAN	2454 EDDING DR LEMON GROVE, CA 91945-3114
346	HERITAGE INTERIORS LLC	GREGORY PETERSEN	2553 DULLES VIEW DR STE 700 HERNDON, VA 20171-5228
347	CINKA CONSTRUCTION & CONSULTING SERVICES LLC	CYNTHIA MARTIN	307 SAINT KITTS LOOP SAINT AUGUSTINE, FL 32092-1181

348	ADVETAGE SOLUTIONS LLC	CHRISTOPHER ROYCE	111 PENN ST STE 202 EL SEGUNDO, CA 90245-3908
349	VANGUARD PACIFIC LLC	SYDNEY CODY	2207 GARNET AVE STE N SAN DIEGO, CA 92109-3713
350	CHEROKEE NATION DEVELOPMENT GROUP, L.L.C.	JENNYLYNN GATES	2 W 2ND ST STE 1500-36 TULSA, OK 74103-3123
351	DIAMOND CAPTURE ASSOCIATES LLC	BARBARA RIVERA	8192 LOST CREEK LN DELRAY BEACH, FL 33446-0022
352	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
353	IPHONE & IPAD WAREHOUSE LLC	BRIAN FARRELL	19101 NE 18TH AVE MIAMI, FL 33179-4214
354	QAYAQ GOVERNMENT SOLUTIONS LLC	LORI SCHENDEL	6700 ARCTIC SPUR RD ANCHORAGE, AK 99518-1550
355	WASEYABEK FEDERAL SERVICES, L.L.C.	VANESSA HATFIELD	16 MONROE CENTER ST NE STE 200-A GRAND RAPIDS, MI 49503-3208
356	KIRA INFRASTRUCTURE LLC	RICHARD RINEHART	1150 ACADEMY PARK LOOP STE 230-H1 COLORADO SPRINGS, CO 80910-3714
357	BORJA ENGINEERING & CONSTRUCTION, INC	SAMSON BORJA	16766 BERNARDO CENTER DR SAN DIEGO, CA 92128-2545
358	CHIRICAHUA PROCUREMENT LLC	JOHN WOFFARD	320 GOLD AVE SW STE 806 ALBUQUERQUE, NM 87102-3202
359	JVR LLC	JAVIER VILLARREAL	128 SEALE RD SAN ANTONIO, TX 78219-2711
360	AJCE CORPORATION	ANTHONY CISNEROS	8570 SW 127TH ST CORAL GABLES, FL 33156-5819
361	DUMOUR SERVICES LLC	JACQUELINE PERKINS	201 CRATER WOODS CT PETERSBURG, VA 23805-9100
362	RSI SERVICES LLC	ALLISON GETSI	151 LAFAYETTE DR STE 100 OAK RIDGE, TN 37830-2502
363	TRADE ON DEMAND, INC.	PAPA MBOW	2550 MERIDIAN BLVD STE 200 FRANKLIN, TN 37067-6384
364	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
365	REALCO DEVELOPMENT LLC	JONATHAN BRADSHAW	1310 N FORT CANYON RD ALPINE, UT 84004-1136

366	WASHINGTON CONTRACTOR SERVICES LLC	EDWIN LANSANG	6204 96TH ST E PUYALLUP, WA 98371-6174
367	ELEVATED DESIGN AND CONSTRUCTION LLC	MICHAEL BEARD	8209 SW 1ST PL GAINESVILLE, FL 32607-1518
368	W E S T DEVELOPMENT, INC.	ALLEN SHABILLA	912 S ANDREASEN DR STE 107 ESCONDIDO, CA 92029-1900
369	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
370	KEKOLU CONTRACTING, LLC	KENDIS KADO	9375 CHESAPEAKE ST STE 209 LA PLATA, MD 20646-3654
371	ALL ACES CORP	MIGUEL PEREZ	1 S OCEAN AVE STE 204 PATCHOGUE, NY 11772-3716
372	EASTHILL CONSTRUCTION CORP	VEDANT BHANDERI	17 ACADEMY ST STE 515 NEWARK, NJ 07102-2932
373	PED CONCEPTS INC.	KELLEY PITTMAN	10752 DEERWOOD PARK BLVD SOUTH WATERVIEW II STE 100 JACKSONVILLE, FL 32246-
374	ALPHA DEMOLITIONS , INC	ANTONIO MEDINA	CARR 685 KM 1.5 BAJURAS WARD MANATI, PR 00674-
375	YUKON MANAGEMENT, LLC	TIMOTHY GAYLES	3900 C ST STE 100 ANCHORAGE, AK 99503-5962
376	ARETE CONTRACTING LLC	KYLE TE	220 E DUNKLIN ST JEFFERSON CITY, MO 65101-3127
377	CAPITOL UNITED SOLUTIONS INC	KARAMJEET BASSAN	9007 BUSH CREEK CIR FREDERICK, MD 21704-7844
378	BROOKES CONSTRUCTION LLC	CHISA BROOKES	3202 WILKINSON BLVD #667492 CHARLOTTE, NC 28208-5659
379	JNB SERVICES LLC	WILLIAM HOLLEY	467 S DALEVILLE AVE DALEVILLE, AL 36322-2350
380	MICRON AIR & MECHANICAL SOLUTIONS INC	KEVIN BUENO	3553 BLACKWELL PL LEXINGTON, KY 40509-9091
381	SPECIALTY CONSTRUCTORS SERVICES INC.	JOSE RODRIGUEZ	197 N 10TH ST STE 203 GROVER BEACH, CA 93433-2159
382	AIKO ENTERPRISES, INC	BEN ARNOLD	4250 LAKESIDE DR STE 213 JACKSONVILLE, FL 32210-3369
383	STILES GENERAL CONTRACTORS LLC	ADELIZ STILES	6505 ANGORA LOOP ST S EL PASO, TX 79934-

384	COPELAND CONTRACTING COMPANY INC	ELSA NIEVES BROWN	1425 UNIVERSAL CITY BLVD BLDG 3 SAN ANTONIO, TX 78148-3364
385	RENO/TAHOE REALTY GROUP LLC	SARAH CARMONA ZINK	232 ANACAPA ST STE 2C SANTA BARBARA, CA 93101-1841
386	L.J.V. DEVELOPMENT, LLC	LISETH VELEZ	50 MILK ST FL 16 BOSTON, MA 02109-5002
387	LEGENDS CONSTRUCTION & DESIGN INC	JOE HOPE	354 OAKWOOD TRL CRAWFORDVILLE, FL 32327-3474
388	CHAMPION COMMERCIAL FENCE BUILDERS, LLC	MIKE RATHE	809 WESTMERE AVE STE C-215 CHARLOTTE, NC 28208-5342
389	ATLANTIC PACIFIC STANDARD LLC	RICHARD OTERO	3001 S 12TH AVE UNIT 1 TUCSON, AZ 85713-6247
390	ALEUT LOGISTICS SERVICES, LLC	ROBERT CAVINESS	5775 MARK DABLING BLVD STE 105 COLORADO SPRINGS, CO 80919-2241
391	THE JAHNDA GROUP, LLC	JESSE ACOSTA	26150 ENTERPRISE WAY STE 200 LAKE FOREST, CA 92630-8413
392	GSI HAWAII INC	JOSEPH LUCAS, IV	181 S KUKUI ST HONOLULU, HI 96813-2306
393	OPTIMA CONTRACTING LLC	AMIN HUSSEIN	4705 EISENHOWER AVE, SUITE A ALEXANDRIA, VA 22304-4805
394	AOR LOGISTICS, LLC	PAUL NESBIT	130 W MAIN ST STE 206 ORANGE, VA 22960-1555
395	ABOHA LLC	CHAD DAVIS	5237 FOREST VIEW RD LAKESIDE, AZ 85929-5730
396	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	111 N ORANGE AVE STE 1020 ORLANDO, FL 32801-2399
397	GRAYLEE CONSTRUCTION LLC	SEAN BEAVERS	1307 HIGHWAY 64 W BEEBE, AR 72012-9518
398	NEXT GENERATION DEVELOPMENT, LLC	DANIEL OKORIE	2525 ROBINHOOD ST STE 216 HOUSTON, TX 77005-2573
399	MILLER ELECTRIC COMPANY INC	ANNABELLE MILLER	2730 SW 57TH ST STE C TOPEKA, KS 66609-9417
400	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
			18 N UNIVERSITY AVE

401	MILLER ELECTRIC CO INC	ANNABELLE MILLER	STE 40 PROVO, UT 84601-8406
402	YUKON MANAGEMENT LLC	TIMOTHY GAYLES	112 N WATER ST SPARTA, WI 54656-1737
403	ICE TECHNICAL SERVICES INCORPORATED	CYNTHIA VANDEN BERG	505 ENON SPRINGS RD E STE 505 SMYRNA, TN 37167-4442
404	ICE TECHNICAL SERVICES INCORPORATED	CYNTHIA VANDEN BERG	240 N EAST PROMONTORY STE 200 OFC 207 FARMINGTON, UT 84025-2950
405	ADAPT CONSULTING LLC	LISA LOWERY	17645 E OLD CHERRY RD DEWEY, AZ 86327-7315
406	RYMARK CONTRACTING, INC	RYAN PRICE	19901 JODI DR LUTZ, FL 33558-5005
407	ATMOS SOLUTIONS INC	ANTHONY FERNANDO	6856 EASTERN AVE NW STE 205 WASHINGTON, DC 20012-2165
408	Miller Electric Company Inc.	Annabelle Miller	471-800 JOHNSTONVILLE DR STE 102 SUSANVILLE, CA 96130-8619
409	SES ENERGY SERVICES LLC	JOHN MORRISON	3550 SAINT JOHNS BLUFF RD S STE 8 JACKSONVILLE, FL 32224-3618
410	ARROWHEAD CONTRACTING INC	RYAN FRAZIER	504 W INTENDENCIA ST PENSACOLA, FL 32502-5537
411	D AND D, LLC	DAVID JSA	10821 PLANTSIDE DR STE 106 LOUISVILLE, KY 40299-6132
412	NAVANCIO LLC	HARSHA CUTTARI	200 MASSACHUSETTS AVE NW 08-150 WASHINGTON, DC 20001-1429
413	AHTNA SOLUTIONS, LLC	PATRICK HARRIS	110 W 38TH AVE STE 200L ANCHORAGE, AK 99503-5677
414	COMPASS ROOFING LLC	LUIS ALLAN ARIAS	7901 PROSPECT AVE KANSAS CITY, MO 64132-2308
415	ARCTIC PEAK LLC	GREGORY PETERSEN	2553 DULLES VIEW DR HERNDON, VA 20171-5226
416	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
417	LEGACY BUILDERS CONSTRUCTION, INC	HECTOR AGUILAR	910 W 19TH ST UPLAND, CA 91784-1503
418	ETOLIN STRAIT DEVELOPMENT GROUP LLC	JAMIE VANEK	7440 CENTRAL BUSINESS PARK DR STE 104 NORFOLK, VA 23513-2827

419	INNOVATIVE MECHANICAL CONTRACTORS LLC	JASON QUINTO	950 BACHMANS VALLEY RD WESTMINSTER, MD 21158-3122
420	EVERSON CONSTRUCTION GROUP, LLC	JOHN EVERSON	12731 FLYNN FOREST DRIVE JACKSONVILLE, FL 32223-1845
421	FOUR TRIBES CIVIL CONSTRUCTION LLC	DOYLE LOWRY	656 QUINCE ORCHARD RD STE 700C GAITHERSBURG, MD 20878-1418
422	NAIR CONTRACTING GROUP, LLC	JAIDEEP NAIR	9694 SHEPARD PL WELLINGTON, FL 33414-6420
423	KINGSTRUCTION, INC	JEFFREY KING	326 TIMBERLINE DR CRESTVIEW, FL 32539-8330
424	MIAMI WIIPICA, LLC	LANCE HERRMAN	1950 ROLAND CLARKE PL STE 210E RESTON, VA 20191-1414
425	KOMAN ADVANTAGE, LLC	ALLEN SANDER	2700 GAMBELL ST STE 401 ANCHORAGE, AK 99503-2833
426	PROPERTY IMPROVEMENT OF NEW BRUNSWICK LLC	GREGORY REID	40 W LAFAYETTE STREET TRENTON, NJ 08608-2011
427	KAOHIAI ELECTRICAL CONTRACTING, LLC	KEONI HALL	41 730 HALEIKI PL WAIMANALO, HI 96795-
428	ALEUT LOGISTICS SERVICES, LLC	ROBERT CAVINESS	4000 OLD SEWARD HWY STE 300 ANCHORAGE, AK 99503-6079
429	CHUGACH SOLUTIONS ENTERPRISE, LLC	KEVIN TERRY	3800 CENTERPOINT DR STE 1200 ANCHORAGE, AK 99503-5825
430	REDTOWN TECHNICAL SERVICES, LLC	DANIELLE LEDFORD	3100 MONITOR AVE STE 140 RM 142 NORMAN, OK 73072-7807
431	HILO ENTERPRISES LLC	DANIEL MARQUARDT	10432 BALLS FORD RD STE 300 MANASSAS, VA 20109-2517
432	GLOBAL QUALITY SOLUTIONS, INC.	Adriana Blankenship	4525 S SANDHILL RD STE 103 LAS VEGAS, NV 89121-5955
433	FULCRUM CONTRACTING GROUP LLC	JORGE JARAMILLO	3073 STORMY POINT DR EL PASO, TX 79938-5001
434	E.K. MANAGEMENT, L.L.C.	EDNA KEEFE	909 EMILY CIR FORT WALTON BEACH, FL 32547-1980
435	DMT ELECTRIC LLC	TRAVIS DURAN	2093 W 25TH ST YUMA, AZ 85364-6911
436	MA-CHIS-WB JV LLC	NADINE SCHLOEMER	3102 COUNTY ROAD 305 ELBA, AL 36323-7678
437	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	7620 N HARTMAN LN STE 126A TUCSON, AZ 85743-8263
			310 DALLAS ST

438	FOREST TRAIL CO LLC	JOSE JUAN AREVALOS	EL PASO, TX 79901-1822
439	M&T GROUP INC	JUAN MORALES PADILLA	CARR. 811, KM. 1.1 INTERIOR BO. CEDRO ABAJO NARANJITO, PR 00719-
440	GRACEN ENGINEERING & CONSTRUCTION INC	STEVEN SAMBRANO II	906 N MESA ST STE 202 EL PASO, TX 79902-4080
441	MOUNTAIN POINT, LLC	JASON BROWN	14360 NEWBROOK DR STE 200 CHANTILLY, VA 20151-4206
442	GOLDBELT OPERATIONS SUPPORT SERVICES LLC	SEAN GOLDSMITH, PE	2681 PHILADELPHIA AVE CHAMBERSBURG, PA 17201-7908
443	THE H.A.B.I.T.S GROUP LLC	ZACHARIAS JOHNSON	6448 E HIGHWAY 290 STE B106 AUSTIN, TX 78723-1038
444	CJ MECHANICAL LLC	CARMELO GARCIA	CARR 814 KM 0.4 BO ANONES NARANJITO, PR 00719-
445	PUYENPA CONSTRUCTION, LLC	EMILY STOUT	511 DUCKWATER FALLS RD DUCKWATER, NV 89314-9800
446	PERFECT GLASSWORKS, LLC	MIKHAIL AN	7901 BEECHCRAFT AVE STE T GAITHERSBURG, MD 20879-1594
447	ALTERNATIVE COATINGS SOLUTIONS, INC.	ANGELICA IBARRA	30032 CIELO MESA TEMECULA, CA 92592-5105
448	HD INC	JANET HURLEY	3116 E LYNDALE AVE HELENA, MT 59601-6445
449	SANALIL CONSTRUCTION, INC.	ARMON RAHMANKHAH	3801 E FLORIDA AVE STE 400 UNIT 56 DENVER, CO 80210-2543
450	VANGUARD PACIFIC LLC	SYDNEY CODY	119 W GARDEN ST PENSACOLA, FL 32502-5617
451	TLI CONSTRUCTION, INC.	CINDY LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
452	PARADIGM CONSTRUCTION SERVICES, LLC	SAMUEL PADILLA	4148 N ARCADIA DR STE 4 PHOENIX, AZ 85018-4302
453	TORRENCE & COMPANY, LLC	ERIC "RICKY" TORRENCE	5752 NC HIGHWAY 41 W TRENTON, NC 28585-5562
454	SILVER-SMITH DEVELOPMENT, LLC	PAMELA JONES-SMITH	1196 CAPITAL CIR NE STE A TALLAHASSEE, FL 32301-3531
455	KOMAN INTEGRATED SOLUTIONS LLC	RUSSELL BORMAN	5632 N 54TH AVE GLENDALE, AZ 85301-6014
456	RIOMAR GROUP VENTURES, INC.	TONY ALONSO	50 OCEAN PKWY APT 2E BROOKLYN, NY 11218-1543

457	CASTOR, LLC	COURTNEY GALLIANO	10777 GREENWELL SPRINGS RD BATON ROUGE, LA 70814-5013
458	MODESTO MANAGEMENT LLC	ERIC DOBYNE	525 S SCOVILLE AVE APT 1 OAK PARK, IL 60304-1485
459	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	5470 S MONROVIA AVE TUCSON, AZ 85706-2120
460	A & E HEATING AND AIR CONDITIONING LLC	WARREN STROTHER	513 11TH ST SE FL 2 WASHINGTON, DC 20003-2831
461	M & G CLEANING & PAINTING SERVICES INC.	MARIA GAITAN	4030 6TH ST BALTIMORE, MD 21225-2108
462	DOYON TECHNICAL SERVICES LLC	ZACHEUS RITCHEY	4601 PRESIDENT DRIVE SUITE 230A GLENARDEN, MD 20706-4365
463	AVANTE CONSTRUCTION INC	YOKO LARKIN	9380 ACTIVITY RD STE J SAN DIEGO, CA 92126-4413
464	HEIDELBERG RESOURCES, LLC	RONALD BERGER	1609 ANTOINETTE DR CORPUS CHRISTI, TX 78418-5404
465	CFS MEDICAL SUPPLIES AND EQUIPMENT, INC	TARA SLAUGHTER	2114 REDONDO BEACH BLVD TORRANCE, CA 90504-1616
466	TVC CONSTRUCTION CORP	CARLOS VALERA	2500 NW 79TH AVE STE 177 MIAMI, FL 33122-1082
467	FILLMORE CONTRACTS, LLC	KIMBERLY KIDD	2330 SCENIC HWY S STE 203 SNELLVILLE, GA 30078-3115
468	MJAG CONSTRUCTION SERVICES, LLC	FELICIA WHITE	10019 S 10TH ST BELLEVUE, NE 68123-4014
469	TEYA SUPPORT SERVICES LLC	RON PERRY	101 E 9TH AVE STE 9B MS-05 ANCHORAGE, AK 99501-3651
470	QUINCON, INC.	JOSE QUINTANA	2363 THOMPSON WAY UNIT F SANTA MARIA, CA 93455-1042
471	CONEMCO ENGINEERING, INC.	JOSE COMPRES	782 NW 42ND AVE STE 635 MIAMI, FL 33126-5547
472	GC WORKS INC	LANCE WAYNE	9894 BISSONNET ST STE 241 HOUSTON, TX 77036-8239
473	MA-CHIS INTERNATIONAL SERVICES INC	NADINE SCHLOEMER	2080 WAITE ST FORT BENNING, GA 31905
474	DOYON TECHNICAL SERVICES, LLC	ZACHEUS RITCHEY	33 COLLEGE HILL RD BLDG 31 WARWICK, RI 02886-2776

475	ARCHWAY SOLUTIONS LLC	ARCH STEPHENS	9743 ARLEEN AVE ZACHARY, LA 70791-8325
476	ET SERVICES LLC	DEREK WILLIAMS	2561 ARUNDEL RD ATLANTA, GA 30337-4905
477	AFN, LLC	MICHAEL AJAYI	3750 MCKEE RD STE B SAN JOSE, CA 95127-2000
478	LALINI ENTERPRISES LLC	LALINI PILLAY	1400 MONTAGUE ST NW WASHINGTON, DC 20011-2870
479	TRI COAST-PAC TECH JV LLLP	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
480	HILO BAC JV LLC	DANIEL MARQUARDT	10432 BALLS FORD RD STE 300 MANASSAS, VA 20109-2517
481	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431
482	MIDNIGHT SUN GLOBAL SERVICES, LLC	JOHNNY JEPPESEN	5700 6TH AVE S STE 105A SEATTLE, WA 98108-2513
483	DAWSON MCG, LLC	DEREK MAR	900 FORT STREET MALL STE 1850 HONOLULU, HI 96813-3707
484	KAIVA SERVICES, LLC	CAMERON ECHOHAWK	6060 W 3650 N STE 400 IVINS, UT 84738-6618
485	JBA CONSTRUCTION LLC	BRADLEY TAKAMORI	740 KOHOU ST STE A HONOLULU, HI 96817-4443
486	RM EXTERIORS GROUP LLC	ALEX VELA	2160 KINGSTON CT SE STE M1 MARIETTA, GA 30067-8951
487	EPIC TECHNICIANS HVAC LLC	MARIAN HUNTER	6115 STARGATE CV ALEXANDER, AR 72002-1787
488	GY6, LLC	STEVE CHAN	195 TUN JOSE SALAS ST STE A TAMUNING, GU 96913-3811
489	ALLIE BRIDGE ENERGY SOLUTIONS	REBECCA WETZSTEIN	1343 N GRAND AVE STE 210 COVINA, CA 91724-4043
490	TRUEDGE SOLUTIONS, LLC	SUNG CHOI	744 CALABRIA LANE AMBLER, PA 19002-1539
491	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
492	FMS PROVIDER LLC	LAURA SAPIR	2276 SW 183RD TER MIRAMAR, FL 33029-5253
			7281 DUMOSA AVE

493	NEWA ENTERPRISES, INC.	BRAD ALBONE	YUCCA VALLEY, CA 92284-3769
494	DOC DEVELOPMENT INC	RADCLIFF QUARTERMAN	300 S 1ST ST STE 302 LEESVILLE, LA 71446-4372
495	DOLIVEIRA DJB JV II LLC	JAMIE DOLIVEIRA	8411 OLD MARLBORO PIKE STE 24 UPPER MARLBORO, MD 20772-2622
496	CAPITOL STEAM AND CLEAN, LLC	NATHANIEL BURTON	2108 VIRGINIA AVE HYATTSVILLE, MD 20785-4944
497	BERT CONSTRUCTION INC	OTIS ROBERTS	5045 PATTERSON RD MONTGOMERY, AL 36116-5820
498	KOMAN INTEGRATED SOLUTIONS LLC	RUSSELL BORMAN	8079 E MAIN ST STE 101 PORT ORCHARD, WA 98366-7515
499	CARTOLI, LLC	CAMILLE EHIAMETALOR	535 TALBERT DR STE 209 PLANO, TX 75093-0042
500	LOPEZ-GUERRA CONSTRUCTION LLC	CAMILA RICH	8400 OSUNA RD NE STE 3A ALBUQUERQUE, NM 87111-2070
501	MIDNIGHT SUN AUS LLC	ELEANOR DAVIS	1577 SPRING HILL RD STE 320 VIENNA, VA 22182-2446
502	KITUWAH SERVICES, LLC	TERRY MOGENSEN	1158 SEVEN CLANS LN WHITTIER, NC 28789-0749
503	ARGUS SERVICES INC	MONIKA SYAL	30 CATOCTIN CIR SE STE 10 LEESBURG, VA 20175-3614
504	ARGUS SERVICES INC	MONIKA SYAL	5008 LENKER ST STE 201 MECHANICSBURG, PA 17050-1925
505	MH CONTRACTING LLC	MANUEL HERRERA	15649 VISTA GRANDE HELOTES, TX 78023-3810
506	DMYLES INC.	Darius A Myles	2140 DREW ST STE B CLEARWATER, FL 33765-3218
507	SES ENERGY SERVICES LLC	JOHN MORRISON	7804 E FUNSTON ST STE 206 WICHITA, KS 67207-3107
508	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	630 ELLIS ST STE 2-D AUGUSTA, GA 30901-1464
509	NATIVE CONSOLIDATED MANAGEMENT LLC	SANDRA CHEN	1221 WEST CAMPBELL ROAD SUITE 203 RICHARDSON, TX 75080-2948
510	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	841 PRUDENTIAL DR STE 1215 JACKSONVILLE, FL 32207-8329
			9848 WIND AVE

511	4M GENERAL CONTRACTORS LLC	JUSTIN MOTLOW	LAKELAND, FL 33809-1650
512	MIDNIGHT SUN GLOBAL SERVICES, LLC	NEIL MILLER	3041 BERKS WAY STE 102F RALEIGH, NC 27614-6777
513	BENECORP INC	CARTER BENEFIELD	1201 SHADOWLAWN DR STE 116 SAINT MARYS, GA 31558-4074
514	MOUNTAIN POINT, LLC	JASON BROWN	1711 S LAREDO ST RM 102 SAN ANTONIO, TX 78207-7076
515	PER-GEESH CONSTRUCTION CORPORATION	PAMELA AMES	190 KLAMATH BLVD KLAMATH, CA 95548-9322
516	KOMAN ADVANTAGE LLC	ALLEN SANDER	8002 WESTWAY DR OFFICE #4 HARLINGEN, TX 78552-6479
517	GC WORKS INC.	LANCE WAYNE	38 ROMNEY ST STE 103 CHARLESTON, SC 29403-3825
518	PUYENPA CONSTRUCTION LLC	EMILY STOUT	207 E RIDGEVILLE BLVD MOUNT AIRY, MD 21771-5257
519	CHAVES BROTHERS MANAGEMENT, LLC	TYLER CHAVES	300 SW 8TH ST APT 17 BOCA RATON, FL 33432-5775
520	SES ENERGY SERVICES LLC	LORNA PACE	990 LAKE HUNTER CIR STE 207 MOUNT PLEASANT, SC 29464-5426
521	TLI CONSTRUCTION, INC.	CYNTHIA LINCICOME	7900 EAST UNION AVENUE SUITE 1100 DENVER, CO 80237-2746
522	SOLAR STEP LLC	LOURDES MARCANO	REPARTO TERESITA U-10 CALLE 20 BAYAMON, PR 00961-8352
523	BENECORP, INC.	CARTER BENEFIELD	2439 MANHATTAN BLVD STE 102-3 HARVEY, LA 70058-5473
524	BENECORP, INC.	CARTER BENEFIELD	501 QUINTARD AVE UNIT 19 ANNISTON, AL 36201-5700
525	BENECORP CONTRACTORS INC	CARTER BENEFIELD	6706 N 9TH AVE STE C6 PENSACOLA, FL 32504-7379
526	RED BISON SERVICES, LLC	RONALD ORTEGO III	2232 FAYETTE ST KENNER, LA 70062-7938
527	RIZA CONSTRUCTION INC.	COREY AVENS	400 W 7TH ST STE 105A BLOOMINGTON, IN 47404-3900
			1345 K ST SE

528	RANGE CONSTRUCTION LLC	YOVANI SALOME-SANCHEZ	UNIT 203 WASHINGTON, DC 20003-4543
529	PUYENPA CONSTRUCTION LLC	EMILY STOUT	813 MAIN ST PORTAGE, PA 15946-1757
530	PUYENPA CONSTRUCTION LLC	EMILY STOUT	109 W MAIN ST STE E CLINTON, NC 28328-4046
531	CHIRICAHUA PROCUREMENT LLC	MIKE GANN	2315 E GORE BLVD LAWTON, OK 73501-6116
532	PIERCE & SONS CONSTRUCTION, LLC	NATHAN PIERCE	3686 BARLOW RD LUMBER BRIDGE, NC 28357-7972
533	ALL AMERICAN FEDERAL CONSTRUCTION LLC	MONIQUE EADDY	27202 STONE HARBOUR LN KATY, TX 77494-3691
534	K2 CONTRACTING GROUP LLC	STEVEN NAPPER	112 MAIN STREET SUITE 2 NATCHEZ, MS 39120-3458
535	MD DOYNE CONSTRUCTION LLC	MASON DOYNE	5009 E 39TH ST LITTLE ROCK, AR 72206-3703
536	K2 CONTRACTING GROUP, LLC	STEVEN NAPPER	8166 COCKBURN CT APT 303 LORTON, VA 22079-2932
537	YUKON MANAGEMENT, LLC	TIMOTHY GAYLES	2000 TOWER OAKS BLVD 6TH FL, STE A ROCKVILLE, MD 20852-4282
538	BRIGGS BROTHERS ENTERPRISES CORP	TERRY BRIGGS	413 ODELL INDUSTRIAL WAY GRIFFIN, GA 30224-8451
539	SDJV	JEFF SNODGRASS	114 E WASHINGTON ST SEYMOUR, MO 65746-8680
540	DOYON CONTRACTING SERVICES, LLC	WILLIAM LINE	3450 S 344TH WAY STE 100 FEDERAL WAY, WA 98001-5931
541	Four Tribes Enterprises, LLC	Doyle Lowry	5100 Buckeystown Pike Ste 223 Frederick, MD 21704-8336
542	NEW DOMINION CONSTRUCTION, LLC	BRYAN DISEATI	9668 MADISON BLVD STE 142 MADISON, AL 35758-9127
543	CCI ELECTRICAL CONTRACTORS, LLC	JOHN MORRISON	4100 LEGENDARY DR STE 250C DESTIN, FL 32541-8608
544	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
545	HVAC ALLIES LLC	THADDEUS REAY	2479 YOLANDA TRL ELLENWOOD, GA 30294-1703
			42091 ORANGE BLOSSOM DR

546	LUNOOR CONSTRUCTION INC.	RODOLFO LUCAR	TEMECULA, CA 92591-5543
547	IGS STRATEGIC JV LLC	CLARENCE LYLES	643 MASSACHUSETTS AVE STE 200 INDIANAPOLIS, IN 46204-1653
548	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	101 PARK AVE STE 1335 OKLAHOMA CITY, OK 73102-7209
549	YERKES SOUTH INC	CHRISTINE YERKES	5605 N MACARTHUR BLVD STE 1066 IRVING, TX 75038-2617
550	WOLFTEK MISSION GROUP, LLC	FRANK WATSON	20405 EXCHANGE ST STE 300 ASHBURN, VA 20147-5935
551	CCI ELECTRICAL CONTRACTORS, LLC	JOHN MORRISON	111 W 16TH AVE STE 448 ANCHORAGE, AK 99501-5169
552	CHENEGA MISSION OPERATIONS LLC	DAVID O'REAR	103 QUALITY CIR NW STE 200 HUNTSVILLE, AL 35806-4537
553	DAWSON CMS, LLC	ANITA FLIGGE	2750 PROSPERITY AVE STE 510 FAIRFAX, VA 22031-4338
554	PUYENPA CONSTRUCTION LLC	EMILY STOUT	9258 CULEBRA RD STE 140-8 SAN ANTONIO, TX 78251-2871
555	CHENEGA MISSION OPERATIONS LLC	DAVID O'REAR	1509 SAINT ANDREWS BLVD PANAMA CITY, FL 32405-2835
556	SES ENERGY SERVICES LLC	JOHN MORRISON	7217 LOCKPORT PL STE 201 LORTON, VA 22079-1584
557	POTAWATOMI DEFENSE OPERATIONS, LLC	AARON FINNIGAN	101 W BENSON BLVD STE 303 ANCHORAGE, AK 99503-3937
558	CETERIS INC	TREY GARDNER	125 N BROAD ST STE 209 THOMASVILLE, GA 31792-8126
559	KAIVA-SIGNATURE JV, LLC	CAMERON ECHOHAWK	6060 W 3650 N STE 800 IVINS, UT 84738-6826
560	KOMAN INTEGRATED SOLUTIONS, LLC	RUSSELL BORMAN	4900 CALIFORNIA AVE 2ND FL BAKERSFIELD, CA 93309-7024
561	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	10475 CROSSPOINT BLVD. STE 206 INDIANAPOLIS, IN 46256-3387
562	UNAMI LLC	LAURA PONDER	9300 NORMANDY BLVD STE 510 JACKSONVILLE, FL 32221-5563
563	CCI ELECTRICAL CONTRACTORS, LLC	JOHN MORRISON	10101 GLOBAL WAY KNOXVILLE, TN 37932-3422
564	AJCE CORP	ANTHONY CISNEROS	132 CLYDE ST STE 1C WEST SAYVILLE, NY 11796-1927
			801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON

565	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	APART COND THE CITY SAN JUAN, PR 00901-
566	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
567	AIKO ENTERPRISES, INC.	BENJAMIN ARNOLD	384 HAROLD L DOW HWY UNIT 26 ELIOT, ME 03903-1411
568	AJCE CORP	ANTHONY CISNEROS	1920 BEN T JOHNS RD ALVATON, KY 42122-9698
569	AAECON GENERAL CONTRACTING LLC	MICHAEL LATHON	2 E BRYAN ST STE 510 SAVANNAH, GA 31401-2671
570	CIERRA GROUP INC.	JENNIFER CIERRA GOMEZ	10565 FAIRFAX BLVD STE 202 FAIRFAX, VA 22030-3104
571	JBW GROUP LLC	WES LANE	3501 HORACE AVE FORT WORTH, TX 76244-8663
572	MIG GOV, LLC	JOSE GUTIERREZ	1 PROFESSIONAL DR STE 9 PORT ROYAL, SC 29935-1104
573	REDFEATHER SOLUTIONS LLC	ALYSSA GARCIA	7400 CATFISH CT FALLON, NV 89406-7102
574	MARTIR, LLC	PAMELA MARTINEZ	399 1ST AVE HALETHORPE, MD 21227-3006
575	MIJA CONSTRUCTION SERVICES LLC	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133
576	ETOLIN STRAIT ASSOCIATES LLC	JAMIE VANEK	7440 CENTRAL BUSINESS PARK DR 104 NORFOLK, VA 23513-2827
577	SPECIALIZED TESTING AND CONSTRUCTION, INC.	HECTOR JOHN RODRIGUEZ	3908 WILLIAMSON RD, STE 140 CROWLEY, TX 76036-9203
578	AJCE - LEE JOINT VENTURE LLC	ANTHONY CISNEROS	8570 SW 127TH ST MIAMI, FL 33156-5819
579	OMEGA BELT BUILT JOINT VENTURE, LLC	BRUCE GAUNTT	2410 CERCA MADERA SAN ANTONIO, TX 78259-
580	MIDNIGHT SUN AUS, LLC	ELEANOR DAVIS	3201 C ST STE 801 ANCHORAGE, AK 99503-3934
581	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
582	PHD LLC	LEE RUDOLPH	4275 E 30TH PL STE B YUMA, AZ 85365-7570
583	MILSPEC CAPITAL PARTNERS INC.	FREDERICK KIM	201 HAY ST 401B FAYETTEVILLE, NC 28301-5582

584	CAPE FOX EXPEDITIONARY, LLC	SHANE MUNCY	14360 NEWBROOK DR STE 200 CHANTILLY, VA 20151-4206
585	FORTIS NATIVE GROUP LLC	JOSH HANCOCK	100 BROOKWOOD ROAD ATMORE, AL 36502-3513
586	TEYA MANAGEMENT SERVICES LLC	ANDY NEWTON	101 E 9TH AVE STE 9B MS-06 ANCHORAGE, AK 99501-3651
587	TEYA DIVERSIFIED SERVICES LLC	ANDY NEWTON	101 E 9TH AVE STE 9B MS-07 ANCHORAGE, AK 99501-3651
588	AHTNA BUILDERS, LLC	BERNARD WONG	1100 N LITTLE BROOK LN STE A-100 PALMER, AK 99645-8931
589	ACE INDUSTRIAL FLOOR COATINGS L.L.C.	SCOTT GUAJARDO	17715 WOODSIDE ST LIVONIA, MI 48152-2743
590	AIR RITE HVAC INC	FABIO ZOCANTE	1 IYANNOUGH RD HYANNIS, MA 02601-2026
591	E-QUAL CONSTRUCTION LLC	ERIKA FLORES	3 CHAD RD PERALTA, NM 87042-8486
592	CHEYANNE, INC.	HOLLIE TOWE	5713 12TH AVE E UNIT 1 TUSCALOOSA, AL 35405-5131
593	CINKA CONSTRUCTION AND CONSULTING SERVICES LLC	CYNTHIA MARTIN	11746 LAKEWAY DR CURTICE, OH 43412-9411
594	PMP/GBAB JV, LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314
595	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
596	CNE-GLOBAL COM JV LLC	JAE KANG	27345 AQUIA PATH DR COURTLAND, VA 23837-2195
597	INTERNATIONAL GLASS & MIRROR INC	GINO BARANELLO	14014 SW 140TH ST MIAMI, FL 33186-5547
598	HCP FEDERAL, LLC	PHILIP HINOJOSA	310 BREESPORT ST STE B SAN ANTONIO, TX 78216-2628
599	LOGAN CURRITO, LLC	CHAN PARK	435 MAIN ST # 200 WOBURN, MA 01801-4239
600	CHUGACH PACIFIC SOLUTIONS LLC	WILLIAM MARTZ	189 E SIKET ST DEDEDO, GU 96929-
601	BRICE PACIFIC LLC	ROBERT CHAMPION	3700 CENTERPOINT DR STE 8154 ANCHORAGE, AK 99503-5800
602	TMSAB LLC	ANDY NEWTON	101 E 9TH AVE STE 9B ANCHORAGE, AK 99501-3651

603	FAR SOLUTIONS LLC	JEFFREY HINDERS	3301 N BUFFALO DR STE 120 LAS VEGAS, NV 89129-7450
604	TEYA SUPPORT SERVICES LLC	RON PERRY	1737 LEE RD 10 AUBURN, AL 36832-8053
605	URBAN STACK	KADI KOHEA	76 6386 PUALANI ST KAILUA KONA, HI 96740-
606	MUNICIPAL BASE SERVICES LLC	LINWOOD BURDEN	1124 WALNUT ST JACKSONVILLE, FL 32206-5138
607	ACCESS MW LLC	ANA ESPINOZA	198 PALOMA MESA RD ANTHONY, NM 88021-8640
608	RMS NICKLAUS JV, LLC	JOHN VARGAS	2143 MONMOUTH DR VENTURA, CA 93001-3801
609	MILESTONE JV, LLC	STACEY MYERS	5000 LETTERKENNY RD STE 280 CHAMBERSBURG, PA 17201-8384
610	MANUNOA, LLC	KENDIS KADO	9375 CHESAPEAKE ST STE 207 LA PLATA, MD 20646-3654
611	MAYORGA CONSTRUCTION GROUP LLC	ANGELO MAYORGA	243 DOGWOOD DR PENSACOLA, FL 32505-5375
612	A-1 SHEFFIELD TEAM LLC	ANDRES BECERRA	100 SE 2ND STREET, SUITE 2000 MIAMI, FL 33131-2101
613	JBW FEDITC JV LLC	MATT ALBERT	14603 HUEBNER RD STE 3002 SAN ANTONIO, TX 78230-5527
614	JBW SAC JV LLC	RYAN HASH	3501 HORACE AVE FORT WORTH, TX 76244-8663
615	JBW STRATTON LLC	WES LANE	15035 N 73RD STREET SUITE B SCOTTSDALE, AZ 85260-2435
616	LAKOTA FEDERAL, LLC	COURTNEY ADDIE	315 LINCOLN ST STE 300 SITKA, AK 99835-7579
617	S&P CONSTRUCTION MANAGEMENT INC.	SOHAIL KHAN	1975 HEMPSTEAD TPKE STE 210 EAST MEADOW, NY 11554-1703
618	JOURNEY VAZQUEZ JV 2 LLC	BARBARA SMITH	7660 PRODUCTION DR CINCINNATI, OH 45237-3209
619	TORAH FEDERAL SYSTEMS LLC	ROBERT PHILLIPS	2948 COUNTY ROAD 377 STE 2 ELBA, AL 36323-7088
620	ARETE JV	KYLE TE	220 E DUNKLIN ST JEFFERSON CITY, MO 65101-3127
621	PARADIGM CCW JV LLC	BRANDON CURTIS	5110 N 40TH ST STE 254 PHOENIX, AZ 85018-2191
622	JVR SOUTHBAY LLC	JAVIER VILLARREAL	13729 E RAY RD GILBERT, AZ 85296-4009

623	SATURN ENTERPRISES, INC.	MARIA MENZIES	27 YORK DR FORT WORTH, TX 76134-2546
624	PDO AHUSAKA JV III LLC	AARON FINNIGAN	3215 W STATE ST STE 309C1 MILWAUKEE, WI 53208-3364
625	MIDNIGHT SUN-GLENMAR JV	JOHNNY JEPPESEN	3201 C ST STE 801 ANCHORAGE, AK 99503-3934
626	TAKOTA FLATS-SEG JV LLC	WAYNE LOPEZ	35734 PARKLAWN CT ROUND HILL, VA 20141-4414
627	UNALAKLEET-WQRI JV, LLC	CONRAD CELESTIAL	300 E QUEEN ST CHAMBERSBURG, PA 17201-2324
628	CHENEGA SUPPLY CHAIN SOLUTIONS, LLC	PAUL NESBIT	609 INDEPENDENCE PKWY STE 210 CHESAPEAKE, VA 23320-5209
629	SUH'DUTSING-PILKINGTON CONSTRUCTION JV II, LLC	CARLA SANCHEZ	600 N 100 E STE N CEDAR CITY, UT 84721-3807
630	EASTHILL KUNJ JV, LLC	VEDANT BHANDERI	17 ACADEMY ST STE 515 NEWARK, NJ 07102-2932
631	M&T - RIGHT WAY, JV LLC	JUAN MORALES PADILLA	CARR. 152 KM. 15.8 INTERIOR, BO. CEDRO ABAJO, SECTOR LOS PAGANES NARANJITO, PR 00719-
632	CNE-SIGNATURE JV2 LLC	JAE KANG	27345 AQUIA PATH DR COURTLAND, VA 23837-2195
633	ARROWHEAD CONTRACTING, INC OF FLORIDA	RYAN FRAZIER	900 MARKET ST STE 209 SHREVEPORT, LA 71101-3761
634	UNALAKLEET-INTEGRIWARD JV, LLC	DIANA DAVIS	300 E QUEEN ST CHAMBERSBURG, PA 17201-2324
635	T&M SERVICE GROUP, LLC	ERIC TORRENCE	5752 NC HIGHWAY 41 W TRENTON, NC 28585-5562
636	RYMARK-S&S JOINT VENTURE LLC	TRAVIS PEREZ	19901 JODI DR LUTZ, FL 33558-5005
637	MILL CREEK FIRELAKE JV LLC	ROCKELL OTERO	19035 US HIGHWAY 75 HOLTON, KS 66436-8101
638	DBRA-FSC JV LLC	DERAGE ALEMAYEHU	9421 WOODED GLEN AVE BURKE, VA 22015-4231
639	MIDNIGHT SUN FEDERAL CONSTRUCTION, LLC	JOHNNY JEPPESEN	3201 C ST STE 801 ANCHORAGE, AK 99503-3934
640	MOUNTAIN POINT, LLC	JASON BROWN	106 DIXIE LN COCOA BEACH, FL 32931-3542
641	VALKYRIE MECHANICAL JV LLC	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
			400 CHRISTY LN

642	COVINGTON FIRELAKE JV, LLC	KATHLEEN CAFFEY	ANDALUSIA, AL 36420-8850
643	CINTEOT INC.	THOMAS HUNT	3000 PRESIDENTIAL DR STE 170 FAIRBORN, OH 45324-6817
644	PUYENPA-IMMERSIVE JV, LLC	EMILY STOUT	511 DUCKWATER FALLS RD DUCKWATER, NV 89314-9800
645	ET&T JV, LLC	KATHLEEN TOWNSEND	7212 LOCKPORT PL OFC B49 LORTON, VA 22079-1525
646	TLI-ACE CO JV, LLC	CYNTHIA LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
647	DAWSON MCG, LLC	DEREK MAR	155 N LAKE AVE 8TH FLOOR, #887 PASADENA, CA 91101-1849
648	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133
649	FOUR TRIBES CIVIL CONSTRUCTION, LLC	DOYLE LOWRY	135 N VICTORY BLVD STE 9 BURBANK, CA 91502-1837
650	ROD TRANSPORT INC.	STEVEN RODRIGUEZ	4051 HOVNANIAN DR SACRAMENTO, CA 95834-7501

#	Name of Firm	Contact	Address and City, State Zip
1	SOUTHERN SAFETY SUPPLY LLC	SARA SIZEMORE	207 CENTER PARK DR STE 2090 KNOXVILLE, TN 37922-2136
2	BAKER & ASSOCIATES INC	LEANNE BROWN	60 COMPARK RD DAYTON, OH 45459-4802
3	ECTRON CORP	KARY DODD	9340 HAZARD WAY SUITE B2 SAN DIEGO, CA 92123-1228
4	IDEAL SYSTEM SOLUTIONS INC	CAROL IRISH	4646 MAIN ST PEQUOT LAKES, MN 56472-4405
5	STREET LEGAL INDUSTRIES, INC	LISA BISESE	102A JEFFERSON CT OAK RIDGE, TN 37830-4821
6	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
7	AMERICAS BEST ELECTRICMART INC	DAVID HICKS	129 W HARMON INDUSTRIAL PARK RD STE D TAMUNING, GU 96913-4166
8	MERCOM, INCORPORATED	DUSTIN FUGETT	1067 PETIGRU DR PAWLEYS ISLAND, SC 29585
9	BRUCE'S ELECTRIC, INC	BARBARA WALKER	7447 BEATLINE RD LONG BEACH, MS 39560-8802
10	COLLINS CONSTRUCTION SERVICES, INC	DAWN MORGAN	2135 ROWLAND AVE SUITE C SAVANNAH, GA 31404-4422
11	CAN'T BE BEAT FENCE AND CONSTRUCTION, LLC	MEREDITH ANDERSON	2204 HIGHWAY 53 PERKINSTON, MS 39573-3910
12	ADVANCED COMMUNICATION CABLING INC	RUTH FRITZ	35 BEACHVIEW LN FALLS OF ROUGH, KY 40119-7576
13	SILER EXCAVATING LLC	TAMMY SILER	1075 HILL ST JELLICO, TN 37762-2358
14	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992
15	JACK WAYTE CONSTRUCTION CO., INC	REGINA BABCOCK	7043 HIGHWAY 54 70 ALAMOGORDO, NM 88310-9138
16	PELICAN SALES INC	JOE GIANNACCO	2825 BUSINESS CENTER BLVD STE C9 MELBOURNE, FL 32940-7193
17	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404

18	EL PASO J.A.G., INC.	ALEX CASTRO	3750 DURAZNO AVE EL PASO, TX 79905-1302
19	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST SAN DIEGO, CA 92121-1544
20	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
21	ASPHALT PLUS, INC.	MELINDA OEDEKOVEN	425 JOHNSON LN BILLINGS, MT 59101-6714
22	ALEXTON INCORPORATED	SOPHIA MARNELL	8210 CINDER BED RD STE 2 LORTON, VA 22079-1136
23	COMPETITIVE CHOICE, INC	AUNDREA YOUNG	9030 KIRBY DR HOUSTON, TX 77054-2504
24	KAU INC	KATHRYN WALDRON	4208 ROSEMONT LN FREDERICKSBURG, VA 22408-1962
25	MHK TECHNOLOGIES INC	SUSAN ROACH	225 VINE ST STE 1 JOHNSTOWN, PA 15901-1518
26	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	401 HANOVER ST FREDERICKSBURG, VA 22401-5936
27	ONEILL CONTRACTORS INC	KANEY ONEILL	4307 REGENCY DR GLENVIEW, IL 60025-5209
28	GLOBE BUILDERS, INC.	ANGELINA RODRIGUEZ CHAVEZ	3009 PERSHING DR APT 1 EL PASO, TX 79903-2534
29	ATWOOD HAY INCORPORATED	GLENDA HAY	321 ALTA VISTA AVE ROSEVILLE, CA 95678-1701
30	TRI COAST CONSTRUCTION, LLC	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
31	PANORAMA CONSULTING, INC.	SAMANTHA MCDANIEL	728 LAKE DR LAUREL HILL, FL 32567-3169
32	EDGE SOLUTIONS LLC	ALICE REDDING	1523 ROYAL SPRINGS ST FAYETTEVILLE, NC 28312-9504
33	ANNA LISA LUNA CONSTRUCTION, INC.	ANNA LUNA	1250 CRUZERO ST OJAI, CA 93023-3819
34	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
35	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
36	KELLY CONSTRUCTION SERVICES INC.	KELLY FISHER	55 MAIN ST STE 5102A ENFIELD, CT 06082-3359

37	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839
38	CLAYTON CO CONSULTANTS LLC	ANNIE CLAYTON	2033 FLESHER AVE JACKSONVILLE, FL 32207-3519
39	MAGADIA CONSULTING INC	MAGDALENA GEBREKRISTOS	1734 ELTON RD STE 200 SILVER SPRING, MD 20903-5717
40	MV7 INC	JACQUELINE MATTIACCIO	8804 FIELDFLOWER LN TAMPA, FL 33635-6258
41	GALE CONSTRUCTION COMPANY OF ILLINOIS	LAURA PAGER	51 W JACKSON ST STE 230 JOLIET, IL 60432-1729
42	WEST PACIFIC ELECTRIC COMPANY CORPORATION	VIRGINIA VILLA	290 EL PORTAL DR PISMO BEACH, CA 93449-1504
43	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
44	8-KOI INC	INGA YOUNG	2725 CENTER PLACE MELBOURNE, FL 32940-7106
45	GCJ INC	GINGER SEPULVEDA	3508 SHAMROCK WAY STE 101 TRACY, CA 95377-9204
46	OUTSIDE BOX LLC	CANDICE SOMERVILLE	1428 FLOYD AVE RICHMOND, VA 23220-4618
47	CITI APPROVED ENTERPRISE, LLC	INGRID THIBODEAUX	2439 MANHATTAN BLVD STE 5052 HARVEY, LA 70058-5328
48	HOSPITALITY LOGISTICS CONCEPT LLC	BASSEL SHUBASSI	9951 OAKTON TERRACE RD OAKTON, VA 22124-2939
49	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609
50	DYNAMIK, INC.	JESSE FELTEN	3990 OLD TOWN AVE, SUITE C107 SAN DIEGO, CA 92110-2968
51	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
52	D&S INTERNATIONAL, LLC	MARLENE CAMAN	5004 BRIGHTON AVE KANSAS CITY, MO 64130-3109
53	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST STE A SAN DIEGO, CA 92121-1544
54	ADELAIDE SERVICES LLC	SELENA ALEMAN	118 BROADWAY ST STE 614 SAN ANTONIO, TX 78205-2007
55	EACM CORP	SOLANGIE ARROYO	20 MERIDIAN RD STE 1 EATONTOWN, NJ 07724-2270
			143 ESSEX ST

56	US ECO PRODUCTS CORP	DOREEN BLADES	STE 210 HAVERHILL, MA 01832-5553
57	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
58	COMP ENVIRONMENTAL, INC.	YANLING CAROLINE WANG	5615 RECKER HWY WINTER HAVEN, FL 33880-1267
59	BATIR ARCHITECTURE LTD	PAULA PRICE	1121 E MAIN STREET SAINT CHARLES, IL 60174-2205
60	AMALGAMATED SERVICES, INC.	KAREN RIFFICE	21024 S 80TH AVE FRANKFORT, IL 60423-9186
61	JCJ CHAVEZ CONSTRUCTION INC	MARILUPE CHAVEZ	115 S GOLD CANYON ST RIDGECREST, CA 93555-4121
62	M&K GENERAL CONTRACTORS INC	KARLA FRESE	1368 WOODEN VALLEY ST CHULA VISTA, CA 91913-2936
63	THE GEMINI 3 GROUP, INC.	LINDA BLAKEMORE	50 TECH PKWY STE 107 STAFFORD, VA 22556-8615
64	ABHZEEN DESIGN INC	BHAVESH NAIK	34 SCHOOL RD E MARLBORO, NJ 07746-2056
65	GC GREEN, INCORPORATED	ELIZABETH PEREZ	102 SHELL DR SAN CLEMENTE, CA 92672-3652
66	SERVITECH, INC.	JIM BARKER	13892 E SMITH DR AURORA, CO 80011-2248
67	K WATSON GROUP LLC	KAREN WATSON	10834 OLD MILL RD STE 4 OMAHA, NE 68154-2648
68	GENECO TECHNOLOGIES, LLC	AMYE AMERINE	236 AIR BASE RD TYE, TX 79563-2322
69	FOUR WINDS MECHANICAL HTC/AC INC.	CHAULING ARMIJO	8915 ADAMS ST NE STE B ALBUQUERQUE, NM 87113-2714
70	FIRELAKE CONSTRUCTION INC	JACKIE FOLEY	1011 E 31ST ST LAWRENCE, KS 66046-5103
71	BGESH INCORPORATED	WESTON HALLIBURTON	21943 DIAMOND CHASE STE 200 SAN ANTONIO, TX 78259-2743
72	GRANITE COMMERCIAL REAL ESTATE LLC	MEGAN PRIETO GIOKAS	30 TEMPLE ST STE 300 NASHUA, NH 03060-2412
73	BRENCO SUPPLY, INC.	KAREN LOYD	210 DAVIDSON DR STE B HOT SPRINGS NATIONAL PARK, AR 71901-9331
			718 18TH ST

74	SITE MANAGEMENT ASSISTANCE LLC	KIMKO DOWELS	MERIDIAN, MS 39301-3547
75	BECKRICH CONSTRUCTION, LLC.	JEFF RICHARDS	8855 WHISPERING PINE TRL COLORADO SPRINGS, CO 80908-3514
76	ACCENTZ, INC.	FARHA KHAN	6695 S QUEMOY CIR AURORA, CO 80016-2686
77	SUNAGO SUPPLY CORPORATION	ETTA TUCKER	2914 VILLA LAKE DR POWDER SPRINGS, GA 30127-5049
78	CM CONSTRUCTION SERVICES, INC.	MONIQUE MIRON	8300 W DOE AVE VISALIA, CA 93291-9261
79	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	2026 S CALLAGHAN RD SAN ANTONIO, TX 78227-2265
80	THE PLUMBING SHOP, INC	PERIDOT DAVIS	1121 FLAMINGO DR AUSTELL, GA 30168-6109
81	CINTEOT INC.	CHRISTINA HUNT	75 S MAIN ST CHAMBERSBURG, PA 17201-2224
82	CHAD PODY CONSTRUCTION COMPANY, L.L.C.	ANGELA PODY	275 GOODGOIN RD RUSTON, LA 71270-8730
83	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
84	PROSPERITUS SOLUTIONS LLC	KRYSTAL NERIO	1014 PEABODY AVE SAN ANTONIO, TX 78211-2844
85	ASPIRYON LLC	NEIL CRISMAN	7600 CHEVY CHASE DR SUITE 300 AUSTIN, TX 78752-1599
86	MINATOISHI PALUMBO ARCHITECTS, INC.	LORRAINE MINATOISHI	1003 BISHOP ST STE 1975 HONOLULU, HI 96813-6461
87	IDEAL SYSTEM SOLUTIONS, INC.	SHELIA HERSHEY	12 ROCKY SLOPE DR SANTA FE, NM 87508-1353
88	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
89	CIN-G CONTRACTING LLC	CINDY GONZALES	5285 W LOUISIANA AVE LAKEWOOD, CO 80232-5938
90	SUGAR SHORES CONSTRUCTION LLC	TAMESHA EVERS	14 LIVE OAK ST STE A7 GULF BREEZE, FL 32561-4484
91	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
92	HD INC.	JANET HURLEY	6391 AVIATION CIR LOVELAND, CO 80538-9000
93	PREMIER MECHANICAL PRODUCTS LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314

94	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
95	MSAB, LLC	LAURA KNIGHT	400 PERRY PKWY PERRY, GA 31069-9246
96	DARBONNIER TACTICAL SUPPLY LLC	BRITTNI DARBONNIER	951 NE 21ST CT OAK HARBOR, WA 98277-2715
97	SAWYER SERVICES INC	KIM SAWYER	56851 GRATIOT AVE CHESTERFIELD, MI 48051-1308
98	BEST VALUE MANAGEMENT, LLC	BRENDA CAMPBELL	1225 W BEAVER ST STE 12306 JACKSONVILLE, FL 32204-1414
99	ARMITAGE ARCHITECTURE INC.	PENNY ARMITAGE	6512 MAIN ST WILLIAMSVILLE, NY 14221-5836
100	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
101	COMP ENVIRONMENTAL INC	CAROLINE WANG	4701 SANGAMORE RD STE N100 BETHESDA, MD 20816-2558
102	DREAM DESIGN & CONSTRUCTION, INC	LEANN WILKES	1101 IDLEWILD AVE GREEN COVE SPRINGS, FL 32043-3903
103	PAULSON PLUMBING & MECHANICAL, LLC	PAULETTE BACA	1211 4TH ST SW ALBUQUERQUE, NM 87102-4368
104	BLOOMSBURIE LLC	KINHA LESTER	3542 N UTAH ST ARLINGTON, VA 22207-4444
105	VANGUARD PACIFIC LLC	SYDNEY CODY	14051 COUNTY ROAD 9 FOLEY, AL 36535-8318
106	ADAPT CONSULTING LLC	LISA LOWERY	598 REDWOOD RD SARATOGA SPRINGS, UT 84045-9603
107	JIM JAM, INC.	JAMES GALLET	11003 W 59TH TER SHAWNEE, KS 66203-2956
108	GRENLAR HOLDINGS, INC	KALEN GRENZEBACH	16636 SIMONDS RD NE KENMORE, WA 98028-4413
109	MIA GENERAL CONTRACTING LLC	BRANDY DODD	4221A HIGHWAY 90 MILTON, FL 32571-2011
110	MX CONSTRUCTION, INC.	TIFFANY AMEZCUA	720 S FRONTAGE RD STE 106 NIPOMO, CA 93444-5626
111	SH MECHANICAL INC.	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
			404 HAUPT SQ SE

112	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	LEESBURG, VA 20175-2722
113	WITHIN INTERIOR DESIGN, INC.	Heather Robinson	205 N WATER ST ELIZABETH CITY, NC 27909-4417
114	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	504 CAPITAL CIR SE STE A TALLAHASSEE, FL 32301-3807
115	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
116	ADDON SERVICES LLC	PRITA ABRAHAM	300 MEMORIAL FIELD DR HOPKINSVILLE, KY 42240-8075
117	Z SQUARED BUILDERS INC.	LOURDES MALAEKEH	5039 ROBERT J MATHEWS PKWY # 400 EL DORADO HILLS, CA 95762-5752
118	TITAN ASSOCIATES GROUP INC.	TANYA LEONARD	1891 INGLESIDE AVE ATHENS, TN 37303-2193
119	GWO, INC.	MIRION GREEN	832 CAMBRIDGE AVE MATTESON, IL 60443-1855
120	TERA CONSULTING INC.	KHURRAM BAJWA	29 ELVES LN LEVITTOWN, NY 11756-5522
121	DOFINE SPRINKLER REBUILDERS INC	DALLES DUFFIN	218 W 13TH ST BURLEY, ID 83318-1602
122	LD SUPPLY, LLC	LISA D'ALESSIO	925 HALE PL STE A6 CHULA VISTA, CA 91914-3507
123	RIVETER ENTERPRISES	CARLA STEPHANY	919 W CUCHARRAS ST STE 130 COLORADO SPRINGS, CO 80905-1646
124	NRK CONSTRUCTION, LLC	NORISHA GLOVER	700 N 10TH ST STE 200 BATON ROUGE, LA 70802-4508
125	EMPOWER CONTRACTING INC.	YOLANDA VALDES	1361 BROOKLYN BLVD BAY SHORE, NY 11706-4008
126	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
127	GLOBAL QUALITY SOLUTIONS, INC.	ADRIANA BLANKENSHIP	7235 BENTLEY RD STE 930 JACKSONVILLE, FL 32256-7565
128	OUTSIDE THE BOX LLC	CANDICE SOMERVILLE	433 EXETER DR BIRMINGHAM, AL 35206-2845
129	NISOU ENTERPRISES INC	NIHARIKA SHASTRI	37279 ASPEN DR FARMINGTON HILLS, MI 48335-5479
130	GULF COAST SOLUTIONS LLC	YVETTE BREAZEALE	12300 BIG CREEK RD GULFPORT, MS 39503-7306
			91-1012 IPOLANI ST APT A

131	MASHIMA ELECTRIC LLC	KATHRYN MASHIMA	KAPOLEI, HI 96707-3062
132	COX-MORGAN & ASSOCIATES, LLC	DONETH MORGAN	6015 CHESTER CIR STE 202 JACKSONVILLE, FL 32217-2273
133	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
134	NATIVE STAR GROUP, INC	JOSH PETERSON	17406 E 425 RD JAY, OK 74346-3735
135	MAKRO CORP.	LAURA GONZALEZ	1761 CARR 8838 SAN JUAN, PR 00926-2741
136	NV SERVICES LLC	NEYSSA VARELA	URB. LAS LOMAS BLOQUE U3 #3 SAN JUAN, PR 00921-
137	COMP ENVIRONMENTAL INC	YANLING CAROLINE WANG	6731 WHITTIER AVE STE B-230 MC LEAN, VA 22101-4525
138	RNN ARCHITECTS, INC	REBECA ARISTIZABAL	2930 S WOLFF ST DENVER, CO 80236-2013
139	CONTRACTING & COMMUNICATIONS SERVICES, INC.	GINA TYSHING	107 ENGLEFIELD DR GAITHERSBURG, MD 20878-2661
140	BUCKET PRO LLC	CHEYENNE BROOKS	1898 BUFFALO ST OLEAN, NY 14760-1142
141	QUEST POWER INTERNATIONAL, LLC	PATRICIA ARAUZ-CORROW	36 W PINE ST STE 202C ORLANDO, FL 32801-2612
142	BLUE CONSTRUCTION SERVICES LLC	SEPTEMBER BLUE	633 YORK LN SE LEESBURG, VA 20175-4017
143	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
144	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	615 BARONNE ST STE 205 NEW ORLEANS, LA 70113-1016
145	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	4203 WOODCOCK DR STE 265 SAN ANTONIO, TX 78228-1312
146	CINKA CONSTRUCTION & CONSULTING SERVICES LLC	CYNTHIA MARTIN	307 SAINT KITTS LOOP SAINT AUGUSTINE, FL 32092-1181
147	KERNS CONSTRUCTION, LLC	ASHLEI KERNS	5366 W PECAN RD LAVEEN, AZ 85339-2456
148	VANGUARD PACIFIC LLC	SYDNEY CODY	2207 GARNET AVE STE N SAN DIEGO, CA 92109-3713
149	ILLUSTRIOUS CONSULTANTS, LLC	KAHLIA MEEKS	2106 RENAISSANCE WAY NE ATLANTA, GA 30308-2461
	DIAMOND CAPTURE ASSOCIATES		8192 LOST CREEK LN

150	LLC	BARBARA RIVERA	DELRAY BEACH, FL 33446-0022
151	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
152	CEDAR PARK GROUP INC	SAMANTHA TERLINE	2 LAWSON AVE UNIT 11 EAST ROCKAWAY, NY 11518-1700
153	DUMOUR SERVICES LLC	JACQUELINE PERKINS	201 CRATER WOODS CT PETERSBURG, VA 23805-9100
154	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
155	GIACORP CONTRACTING INC	LISA WALTER CALICCHIA	11 BRADHURST AVE HAWTHORNE, NY 10532-2135
156	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
157	PED CONCEPTS INC.	KELLEY PITTMAN	10752 DEERWOOD PARK BLVD SOUTH WATERVIEW II STE 100 JACKSONVILLE, FL 32246-
158	BROOKES CONSTRUCTION LLC	CHISA BROOKES	3202 WILKINSON BLVD #667492 CHARLOTTE, NC 28208-5659
159	STILES GENERAL CONTRACTORS LLC	ADELIZ STILES	6505 ANGORA LOOP ST S EL PASO, TX 79934-
160	COPELAND CONTRACTING COMPANY INC	ELSA NIEVES BROWN	1425 UNIVERSAL CITY BLVD BLDG 3 SAN ANTONIO, TX 78148-3364
161	RENO/TAHOE REALTY GROUP LLC	SARAH CARMONA ZINK	232 ANACAPA ST STE 2C SANTA BARBARA, CA 93101-1841
162	L.J.V. DEVELOPMENT, LLC	LISETH VELEZ	50 MILK ST FL 16 BOSTON, MA 02109-5002
163	SEAMAN GROUP LLC	ANGELA SEAMAN	7775 FIREFALL WAY APT 1532 DALLAS, TX 75230-7312
164	SPEARS CONSTRUCTION GROUP INC	KAREN SPEARS	7688 SW JACK JAMES DR STUART, FL 34997-7239
165	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	111 N ORANGE AVE STE 1020 ORLANDO, FL 32801-2399
166	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
			3501 HOLIDAY DR STE 311

167	NIKKI'S ETC. L.L.C.	NAKIA JONES	NEW ORLEANS, LA 70114-8283
168	NOVA BUILDING SOLUTIONS LLC	NADINE VILLANUEVA	27103 E ONTARIO PL AURORA, CO 80016-7514
169	ADAPT CONSULTING LLC	LISA LOWERY	17645 E OLD CHERRY RD DEWEY, AZ 86327-7315
170	ADDON SERVICES LLC	PRITA ABRAHAM	1800 DIAGONAL RD STE 600 ALEXANDRIA, VA 22314-2840
171	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
172	GLOBAL QUALITY SOLUTIONS, INC.	Adriana Blankenship	4525 S SANDHILL RD STE 103 LAS VEGAS, NV 89121-5955
173	AXC INNOVATIONS INC	ANH THU DOAN	1312 E GUAVA AVE LOMPOC, CA 93436-6213
174	E.K. MANAGEMENT, L.L.C.	EDNA KEEFE	909 EMILY CIR FORT WALTON BEACH, FL 32547-1980
175	AANTILIA LLC	PRIYAL AGRAWAL	701 TILLERY ST STE 12 AUSTIN, TX 78702-3751
176	HD INC	JANET HURLEY	3116 E LYNDALE AVE HELENA, MT 59601-6445
177	M.K. MOORE & SONS, INC	ANTHONY MOORE	5150 WAGNER FORD RD DAYTON, OH 45414-3662
178	VANGUARD PACIFIC LLC	SYDNEY CODY	119 W GARDEN ST PENSACOLA, FL 32502-5617
179	NORTHERN STONE CARVING LLC	MARGARET MOORE	211 SAINT ANTHONY PKWY STE B9 MINNEAPOLIS, MN 55418-4862
180	TLI CONSTRUCTION, INC.	CINDY LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
181	SILVER-SMITH DEVELOPMENT, LLC	PAMELA JONES-SMITH	1196 CAPITAL CIR NE STE A TALLAHASSEE, FL 32301-3531
182	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	5470 S MONROVIA AVE TUCSON, AZ 85706-2120
183	AVANTE CONSTRUCTION INC	YOKO LARKIN	9380 ACTIVITY RD STE J SAN DIEGO, CA 92126-4413
184	CFS MEDICAL SUPPLIES AND EQUIPMENT, INC	TARA SLAUGHTER	2114 REDONDO BEACH BLVD TORRANCE, CA 90504-1616
185	MJAG CONSTRUCTION SERVICES, LLC	FELICIA WHITE	10019 S 10TH ST BELLEVUE, NE 68123-4014
			151 ROSE ST

186	COMMERCIAL CONTRACTORS LLC	AMY TAMANAHA	APT A WAHIAWA, HI 96786-2365
187	DONNATHEPILOT, LLC	DONNA ENGELBRECHT	6 FAIRWAY RD JACKSONVILLE BEACH, FL 32250-2635
188	BUSINESS PREP, LLC	MONIQUE MUNRO	5159 POOKS HILL RD APT 1410 BETHESDA, MD 20814-5605
189	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431
190	BLUE, ELAINE	ELAINE BLUE	1545 QUADRILLE CT RIVERSIDE, CA 92503-7221
191	TRUEDGE SOLUTIONS, LLC	SUNG CHOI	744 CALABRIA LANE AMBLER, PA 19002-1539
192	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
193	JMC HOMES & GENERAL CONTRACTING, LLC	RHONDA CAGLE	390 RACETRACK RD MCDONOUGH, GA 30252-1022
194	OSPREY ADVANTAGE SOLUTIONS LLC	MARIA CARO	133 RIVER RUN QUEENSTOWN, MD 21658-1642
195	PARKER CONSTRUCTION ENTERPRISES INC	JULIETTE PARKER	5284 GOLD TREE CT ORLANDO, FL 32808-1772
196	MAUKA CONTRACTING LLC	AMBER STRONG	3084 POIPU RD KOLOA, HI 96756-9573
197	FREEDOM FLEUR LLC	KIRSTIE HORTON	1033 DEMONBREUN ST STE 300 NASHVILLE, TN 37203-4512
198	LOPEZ-GUERRA CONSTRUCTION LLC	CAMILA RICH	8400 OSUNA RD NE STE 3A ALBUQUERQUE, NM 87111-2070
199	ADDON SERVICES LLC	PRITA ABRAHAM	124 KAULANA WAY HONOLULU, HI 96821-2531
200	BGM HOMES LLC	JASMINE THORNTON	2801 LOIS LANE ROWLETT, TX 75088-4955
201	FREEDOM CONSTRUCTION AND CONSULTING INC.	BRENDAN TULLY	1015 GODFREY AVE SW GRAND RAPIDS, MI 49503-5005
202	TLI CONSTRUCTION, INC.	CYNTHIA LINCICOME	7900 EAST UNION AVENUE SUITE 1100 DENVER, CO 80237-2746
203	LSHADDAI CONSULTING LLC	CHIQUITA SPEARS	5404 RUE NICOLE BAKER, LA 70714-8017

204	TEFERA INVESTMENT GROUP LLC	ROSEMARY TEFERA	125 SW CAMPUS DR APT 1106 FEDERAL WAY, WA 98023-8313
205	RED HILLS PARTNERS LLC	MELISSA OGLESBY	7805 BRIARCREEK RD N TALLAHASSEE, FL 32312-3661
206	G.M. HILL ENGINEERING, INC.	GINA HILL	283 CONSTITUTION DR SUITE 903 VIRGINIA BEACH, VA 23462-6722
207	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
208	YERKES SOUTH INC	CHRISTINE YERKES	5605 N MACARTHUR BLVD STE 1066 IRVING, TX 75038-2617
209	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
210	VIRTUAL ACCOUNTING GROUP INC	FABIENNE GLEMAUD	5907 HEAVENWOOD DR SE MABLETON, GA 30126-3689
211	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
212	FM CIBORT LLC	FRANK CIBORT	752 CHAMBERS ST HARRISBURG, PA 17113-1705
213	CIERRA GROUP INC.	JENNIFER CIERRA GOMEZ	10565 FAIRFAX BLVD STE 202 FAIRFAX, VA 22030-3104
214	ROYAL T SERVICES LLC		
215	REDFEATHER SOLUTIONS LLC	ALYSSA GARCIA	7400 CATFISH CT FALLON, NV 89406-7102
216	GILL SQUARED FOR VETS LLC	MICHELLE GILL	200 GILL DR CLINTON, MS 39056-9643
217	RDMC LLC	VALERIE GRAVES	10563 WESTCLIFF PL HIGHLANDS RANCH, CO 80130-6916
218	KRAEMER CONTRACTING GROUP, INC.	CHRISTINE KRAEMER	603 COUNTRY CLUB DR STE A BENSENVILLE, IL 60106-1329
219	GLOBAL BEAMS INC.	ATIQA BHATTI	138 W. ARBOR CAMP CIR SPRING, TX 77389-5323
220	SUPPLY ON THE GO LLC	ROSSANNA CAMURUNGAN	3186 STATE ROUTE 27 STE 106 KENDALL PARK, NJ 08824-1513
			11228 STAGESTONE WAY

221	ALH DYNAMICS LLC	IMAN HOLMES	MANASSAS, VA 20109-7620
222	PROPERTY SCOPE INC	ANN FANGMAN	324 E MAIN ST UNIT 301 LOUISVILLE, KY 40202-1288
223	ADDON SERVICES LLC	PRITA ABRAHAM	27789 MOUND RD STE 200 WARREN, MI 48092-2697
224	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
225	PHD LLC	LEE RUDOLPH	4275 E 30TH PL STE B YUMA, AZ 85365-7570
226	AC GREEN LLC	CLAIRE GREEN	6648 HUDNELL RD ATHENS, OH 45701-8952
227	C&R CONTRACTORS LLC	CAROL CANTRELL	1499 TRESTLE CV HORN LAKE, MS 38637-8525
228	NO SWEAT KC LLC	MISTY DIXON	1451 NW 800TH RD HOLDEN, MO 64040-8419
229	GREEN STAR TECH LLC	SELAM DESTA	722 E MARKET ST STE 102 #V56 LEESBURG, VA 20176-4475
230	THE MAINSITE GROUP CORPORATION	KANDICE MERRICK	1507 MCARTHUR DRIVE DUNCANVILLE, TX 75137-4221
231	TYNES PROPERTY MANAGEMENT LLC	KANDICE TYNES	1878 GRANDSTAND DR SAN ANTONIO, TX 78238-4507
232	CINKA CONSTRUCTION AND CONSULTING SERVICES LLC	CYNTHIA MARTIN	11746 LAKEWAY DR CURTICE, OH 43412-9411
233	SERVICE LIVING LLC		
234	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
235	SYNCOR CONSULTING LLC	CRYSTAL BABB	1231 WALKERS WAY SAN ANTONIO, TX 78216-7714
236	TDP PROFESSIONALS, LLC	TERESA PHILLIPS	5990 KING WAY WALK LITHONIA, GA 30058-6172
237	GH PARTS & COMPONENTS, INC.	HOPE PATTERSON	2409 N BROAD ST SELMA, AL 36701-4010
238	BISHOP CLEAN CARE INC	JENNY SAVELLE	234 CEDRIC ST LEESBURG, GA 31763-4993
239	C & L PUMP SERVICE, INC.	LUIS MAGALLANES	11227 PELLICANO DR STE B EL PASO, TX 79935-5303

240	RUSTY BUCKET CONSTRUCTION LLC	SHIRLEY ESCOBAR	614 E OVINGTON ST LANCASTER, CA 93535-3201
241	J & J ELEVATOR SERVICES, INC.	JOYCE DEBROT	13412 E 249TH ST PECULIAR, MO 64078-8964
242	ALTA SOURCING PARTNERS LLC	MICHELLE ZELASKO	805 NORTH PAULINA AVENUE REDONDO BEACH, CA 90277-2250
243	CLL SPECIALISTS CORP	CAROL LOVELESS	11925 STARCREST DR SAN ANTONIO, TX 78247-4111
244	PHARMA PARAPLUIE LLC	ABIDAH OTTLEY	7736 W GRANADA RD PHOENIX, AZ 85035-5066
245	FLEXOVEYOR INDUSTRIES, INC.	TERESA GAGNA	3795 PARIS STREET UNIT B&C DENVER, CO 80239-3368
246	AMB CONTRACTING LLC	AVA BOWLES	7813 ALHAMBRA BLVD MIRAMAR, FL 33023-
247	RED FEATHER FEDERAL, LLC	MELISSA COOPER	2313 S BROADWAY AVE OKLAHOMA CITY, OK 73109-6023
248	ARS PRIME LOGISTICS, LLC	DENISE SHERMAN	1840 WESTERN AVE ALBANY, NY 12203-4624
249	MURADO LLC		
250	TAWAKKULL LLC	FATIMA ABUBAKAR	2204 RONALD DR WEST NORRITON, PA 19403-1353
251	FOSTERED VETERANS CORP	STEVEN MAATOUK	7301 N LINCOLN AVE STE 197 LINCOLNWOOD, IL 60712-1745
252	AFLUX INDUSTRIALS L.L.C.	SHAUNELLE SANDY	7127 GOBLET WAY CLINTON, MD 20735-5813
253	D'RAY PUBLIC SPEAKING & MORE, LP		
254	SATURN ENTERPRISES, INC.	MARIA MENZIES	27 YORK DR FORT WORTH, TX 76134-2546
255	ATHENA SERVICE SOLUTIONS LIMITED LIABILITY COMPANY	PAULETTE MCKENZIE	20 GREGORY FARM RD EASTON, CT 06612-2049
256	D&A CONTRACTING LLC	KAITLYN DASHER	2950 SUMNER WAY PALM HARBOR, FL 34684-1600
257	RAINTREE SOURCING & SUPPLY, LLC	NICOLE MILNER	4932 W SAINT CHARLES AVE LAKE CHARLES, LA 70605-6756
258	PROPERTY MANAGEMENT ENTERPRISES, INC.	JENNIFER WALTON	255 ROSE APPLE LN NAPLES, FL 34114-2555
259	BASEHIT SERVICES INC		
260	SHERMEZ LOGISTICS LLC	SHERRIE GOMEZ	24841 SW 120TH PL HOMESTEAD, FL 33032-5979
			225 1ST AVE N UNIT 904

261	FMS CONSULTING LLC	FAITH SHARP	SAINT PETERSBURG, FL 33701-3589
262	JAI CONSTRUCTION, LLC	JENA DUROUSSEAU	5501 OPELOUSAS ST LAKE CHARLES, LA 70615-3031
263	GLOBA TEK LLC	GLORIMAR KULINSKI	1701 LUBBOCK DR COPPERAS COVE, TX 76522-2187
264	MBAN INDUSTRIES LLC	ANNETTE ACHONDUH	3817 VALLARTA LN ROUND ROCK, TX 78681-2354
265	LOGIC ELEVATOR SOLUTIONS INC	KRISTEN BAUER	16424 W TURNBERRY CIR LOCKPORT, IL 60441-6146
266	STELLARS PRECISIONS LLC	SHONTERIA ROGERS	8735 DUNWOODY PL STE 5614 ATLANTA, GA 30350-2995
267	THE FOOT BULLY, L.L.C	KRYSTLE CAVINESS	8954 DAWNRIDGE DR HOUSTON, TX 77071-2446
268	DCT SPECIALTY CONSTRUCTION LLC	JESSICA SARANTAKIS	8501 E BONNIE ROSE AVE SCOTTSDALE, AZ 85250-6717
269	WEST MICHIGAN DOORS & CLOSETS L.L.C	LIA JENSEN	4245 44TH ST SE STE 10 GRAND RAPIDS, MI 49512-4053
270	DMGZ CONSTRUCTION, LLC	NOEMI DOMINGUEZ	21840 BRIGGS COLEMAN RD HARLINGEN, TX 78550-1724
271	CINTEOT INC.	THOMAS HUNT	3000 PRESIDENTIAL DR STE 170 FAIRBORN, OH 45324-6817
272	CAPROCK INDUSTRIAL LLC	TAZIA VAN JOHNSON	1100 W TOWN AND COUNTRY RD STE 1250 ORANGE, CA 92868-4633
273	LET US DO THIS, LLC	LISENNY RODRIGUEZ	1301 COPPER CT APT 1301 NEW WINDSOR, NY 12553-4504
274	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133

#	Name of Firm	Contact	Address and City, State Zip
1	ENVIRONMENTAL CONSULTANTS INC	ALEC FELHABER	1111 MYRTLE AVE EL PASO, TX 79901-1517
2	JULIUS KAAZ CONSTRUCTION CO INC	JODY KAAZ	716 CHEROKEE ST LEAVENWORTH, KS 66048-2467
3	DOUG OBRYAN CONTRACTING INC	DOUG O'BRYAN	21617 US HIGHWAY 18 MARTIN, SD 57551-5931
4	HUFFMAN WELDING & MACHINE, INC.	JASON HUFFMAN	6224 AVENUE O FORT MADISON, IA 52627-9533
5	CND, LLC	JENNYLYNN GATES	470739 HIGHWAY 51 STILWELL, OK 74960-9194
6	SHILOG, LTD	CONNIE CLEMONS	3551 MT MORIAH MCALESTER, OK 74501-2523
7	SEA PAC ENGINEERING INC	JOHN LEE	625 S NEW HAMPSHIRE AVE LOS ANGELES, CA 90005-1342
8	KHOTOL SERVICES CORPORATION	DAVID PLAINS	100 FRONT ST. GALENA, AK 99741-0019
9	NATIONAL MATERIAL SUPPLY CO LLC	KEVIE HENDRIX	4304 SPRING AVE DALLAS, TX 75210-1651
10	T.A.B. COMPANY, INC.	ANNETTA VICKERS-BENTIL	5561 ENRIGHT AVE SAINT LOUIS, MO 63112-3011
11	IDEAL SYSTEM SOLUTIONS INC	CAROL IRISH	4646 MAIN ST PEQUOT LAKES, MN 56472-4405
12	LOPEZ, JOSEFINA	JOSEFINA LOPEZ	4044 CRYSTAL DAWN LANE #102 SAN DIEGO, CA 92122-5835
13	WORRELL CONTRACTING CO INC	ADRIAN WORRELL	201 N CENTER ST GOLDSBORO, NC 27530-3622
14	FIRST PLACE SUPPLY, INC.	PATRICIA CORTHELL	47 N TREATY HWY POCATELLO, ID 83202-7008
15	M-80 SYSTEMS, INC.	JESSICA LEON GUERRERO	176 W MARINE CORPS DR ASAN, GU 96910-5068
16	FARGO PACIFIC INC.	JAY PARK	124 SERENU AVE TAMUNING, GU 96913-3407
17	DOTZLER CONSTRUCTION, INC.	ARLENE DOTZLER	216 W WALNUT AVE LOMPOC, CA 93436-6750
18	WEB-HED TECHNOLOGIES, LLC	JUANITA GONZALEZ	318 MENEFEE BLVD SAN ANTONIO, TX 78207-7830
19	CHAVIS' INC.	FITZGERALD CHAVIS	204 NC HIGHWAY 71 N MAXTON, NC 28364-7786
			355 PRICE RD

20	GROT, INC.	JERRY GROT	LEXINGTON, KY 40511-1996
21	ANA SOURCING LLC	KAYLIN CHESTNUT	20 RICHEY AVE OAKLYN, NJ 08107-2306
22	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
23	J. SANCHEZ CONTRACTING, INC.	JOE SANCHEZ	734 FLANDERS AVE SAN ANTONIO, TX 78214-1684
24	AMERICAS BEST ELECTRICMART INC	DAVID HICKS	RD STE D TAMUNING, GU 96913-4166
25	PACIFIC OFFICE SOLUTIONS LLC	JULIE VALDEZ	3403 S 8TH AVE YAKIMA, WA 98903-9513
26	GRAHAMS CONSTRUCTION INC	SCOTT GRAHAM	STE D DELCO, NC 28436-9197
27	YERBA BUENA ENGINEERING & CONSTRUCTION, INC.	MIGUEL GALARZA	1340 EGBERT AVE SAN FRANCISCO, CA 94124-3617
28	GREENWOOD GROUP INC	CHRIS GREENWOOD	2117 N WAVERLY ST PONCA CITY, OK 74601-1102
29	ALAMO CITY CONSTRUCTORS, INC.	GREGORY ALEXANDER	1716 S SAN MARCOS STE 215 SAN ANTONIO, TX 78207-7014
30	CABLE MOORE, INC.	GREG MOORE	4700 COLISEUM WAY OAKLAND, CA 94601-5008
31	ALTA MAX LLC	HANK TORBERT	246 HARBOR CIR NEW ORLEANS, LA 70126-1104
32	T & D MECHANICAL, INC.	JENNY ECKMAN	1501 CUSSETA RD COLUMBUS, GA 31901-3343
33	PACIFIC UNLIMITED INC	MICHAEL LIMTIACO	17-3311 CORSAIR AVE BARRIGADA, GU 96913-1613
34	BATES ENTERPRISES INC	CARLA BATES	51 HOLLYWOOD BLVD CHILDERSBURG, AL 35044-1064
35	HEARTWOOD PACIFIC, LLC	FREDERICK SINGER	15-2038 10TH AVENUE KEAAU, HI 96749-
36	MITEL DISTRIBUTING CORP	CESAR MUNECAS	4 CALLE AMERICA SAN JUAN, PR 00917-3638
37	G & C EQUIPMENT CORPORATION	JAY YANO	1715 W 130TH ST STE F GARDENA, CA 90249-2028
			PKWY

38	THE AMERICANA GROUP INC	LEILANI FLORES	TAMUNING, GU 96913-3509
39	B & H CONTRACTING COMPANY, INC	DAVID MCMINDES	502 N GARDEN AVE STE M 4A/B MATEO BUIDLING SIERRA VISTA, AZ 85635-3807
40	SERGENTS MECHANICAL SYSTEMS INC	JUSTIN LEGERE	235 QUAIL CT SANTA PAULA, CA 93060-9653
41	D.J. GROUP INC	JERRY WELCH	226 6TH ST BEVERLY, OH 45715-3013
42	ARNOLD ELECTRIC INC	JAMES RYALS	1424 E 3RD ST TULSA, OK 74120-2804
43	HC SERVICES INC	PAMELA BRIDGES	3870 HIGHWAY 84 E LAUREL, MS 39443-7336
44	G.L.H.C. SERVICES COMPANY	GOLBER HARDIN	11276 US HIGHWAY 301 N LUMBERTON, NC 28360-3789
45	CNI MANUFACTURING, LLC	JONNA KIRSCHNER	2600 JOHN SAXON BLVD NORMAN, OK 73071-1166
46	DOOR TECH, LLC	IAN COMER	5768 E GERSHMEL LOOP PALMER, AK 99645-8498
47	TEVET LLC	STEPHANIE HARDIN	310 T ELMER COX RD GREENEVILLE, TN 37743-6932
48	KPH CONSTRUCTION CORP	KEITH HARENDA	1237 W BRUCE ST MILWAUKEE, WI 53204-1218
49	MOUNTAIN CONSULTING, INC.	KIM ADAMS	103 S BRADFORD ST DOVER, DE 19904-7317
50	SILER EXCAVATING LLC	TAMMY SILER	1075 HILL ST JELLICO, TN 37762-2358
51	INSULATION SOURCES INC	BETTY KLANDA	2575 E BAYSHORE RD PALO ALTO, CA 94303-3210
52	SOUTHWEST PAINT PRODUCTS, INC.	PROSPERO BRIGANTE	1138 E PENNSYLVANIA AVE ESCONDIDO, CA 92025-3209
53	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992
54	EBS SUPPLY, INC.	GILBERT WEST	1901 1ST AVE STE 146 SAN DIEGO, CA 92101-0300
55	APEX PINNACLE CORP	TAMMY TAYLOR	326 WATER ST BINGHAMTON, NY 13901-2618
56	INSULATION SOURCES INC	BETTY KLANDA	1880 IOWA AVE STE 100 RIVERSIDE, CA 92507-7405
			198 ADRIAN C SANCHEZ ST STE 3

57	ADVANCE MANAGEMENT, INC.	MONTY MCDOWELL	TAMUNING, GU 96913-4456
58	SPECTRUM ELECTRIC INC	STEPHANIE PHILLIPS	410 SWEETWATER VONORE RD SWEETWATER, TN 37874-3025
59	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404
60	EL PASO J.A.G., INC.	ALEX CASTRO	3750 DURAZNO AVE EL PASO, TX 79905-1302
61	VSS LOGISTICS LLC	BEN BIZZELLE	15364 WHYTE HARDEE BLVD STE B HARDEEVILLE, SC 29927-6908
62	DOOR ADO EQUIPMENT SPECIALTIES, CORP.	JO ANN MEDINA	CALLE FERNANDEZ JUNCOS EDIFICIO PLAZA CENTRO CAROLINA, PR 00986-
63	ACUMEN ENTERPRISES INC	WAYNE BOYTER	1504 FALCON DR DESOTO, TX 75115-2414
64	HARD LIGHT CONSULTING GROUP, L.L.C.	DONALD SMITH	SE STE 200 WASHINGTON, DC 20032-1533
65	JAMCO VENTURES LLC	JOE MUNIZ	1450 N FLORES ST STE 2 SAN ANTONIO, TX 78212-4928
66	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
67	GERANIOS ENTERPRISES INC	LINDA GERANIOS	320 CENTRAL AVE SUITE 2 GREAT FALLS, MT 59401-3114
68	ALLNATIVE SOLUTIONS CORPORATION	RICHARD LAHM	818 ST. AUGUSTINES DRIVE WINNEBAGO, NE 68071-5167
69	T & T MATERIALS INC	JAMES TERHUNE	45 EXCHANGE BLVD STE 1000 ROCHESTER, NY 14614-2093
70	EVCO PARTNERS LP	EMILY MARKS	2701 PALMER HWY TEXAS CITY, TX 77590-6938
71	IAN CORPORATION	JIHYUNG CHONG	1129 ROUTE 15 BARRIGADA, GU 96913-
72	JOSEPH T BERRENA MECHANICALS INC	MATTHEW BERRENA	279 STANDING STONE AVE HUNTINGDON, PA 16652-1304
73	MGS CONSTRUCTION SERVICES INC	DIANE SANDERS	1500 ENTERPRISE DR STE 308 LEMOORE, CA 93245-9074
74	CAGUAS MECHANICAL CONTRACTOR INC	ALEX NIEVES	U4 CALLE NEBRASKA CAGUAS, PR 00725-2246

75	BYERLY & COOK CORP.	DYLAN BYERLY	127 CHALAN PASAHERU TAMUNING, GU 96913-4127
76	ARROWHEAD TRUCK EQUIPMENT INC	KIM DOAK	12300 S MINGO RD BIXBY, OK 74008-2141
77	E.L.C.I. CONSTRUCTION GROUP, INC.	MOISES BICHACHI	626 NE 124TH ST NORTH MIAMI, FL 33161-5523
78	DOC DEVELOPMENT, INC.	RADCLIFF QUARTERMAN	2500 PARK CENTRAL BLVD STE A6 DECATUR, GA 30035-3925
79	GULF PACIFIC CONTRACTING LLC	JASON HOWELL	750 SAND PATH RD BONIFAY, FL 32425-7426
80	BAIRCO CONSTRUCTION INC	STACY BAIR	1164 ROAD 7 LOVELL, WY 82431-9627
81	TELLES CONSTRUCTION CONSULTANTS LLC	THOMAS TELLES	3517 GATEWAY BLVD W EL PASO, TX 79903-4413
82	HURRICANE ELECTRONICS, INC.	LEANDRA CAIN	1480 SW 3RD ST # C-10 POMPANO BEACH, FL 33069-3225
83	E-LOGIC, INC.	LUIS PADILLA	7000 WASHINGTON, DC 20006-1921
84	WJMC LLC	ANGIE MCCLAIN	105 CHOCTAW ST ANDALUSIA, AL 36420-2563
85	A ROCK CONSTRUCTION CO INC	PERCY MCDONALD	400 IONE ST GREENWOOD, MS 38930-3714
86	GLOBE BUILDERS, INC.	ANGELINA RODRIGUEZ CHAVEZ	3009 PERSHING DR APT 1 EL PASO, TX 79903-2534
87	PUERTO RICO WATER MANAGEMENT INC	LUZ OTERO	216 CALLE DEL VALLE SAN JUAN, PR 00911-2328
88	PONTIAC DRYWALL SYSTEMS INC.	PHALANDA TRAVIS	20 W HURON ST PONTIAC, MI 48342-2100
89	TEAM HENRY ENTERPRISES, LLC	DEVON HENRY	2150 MAGNOLIA ST RICHMOND, VA 23223-2310
90	DAWN INCORPORATED	DAWN OCHMAN	2861 SFERRA AVE NW WARREN, OH 44483-2273
91	POWIS CONTRACTING INC	HOLLIE POWIS	9421 NUMBER THREE RD COPENHAGEN, NY 13626-3521
92	INTERNATIONAL GLOBAL SOLUTION, CORP	CLARENCE LYLES	643 MASSACHUSETTS AVE STE 200 INDIANAPOLIS, IN 46204-1653
93	N.A.E. ENTERPRISES, INC.	CHANTAL DAUENHAUER	843 S CHERRY LN FORT WORTH, TX 76108-2507
			ST 19 SUITE 1, LAS PALMAS VILLAGE

94	JCD ENGINEERING, INC.	JUAN DEL PINO	CATANO, PR 00962-
95	JOHN CHRIS TAYLOR CONSTRUCTION & DESIGN LLC	JOHN TAYLOR	11 MARCY ST FREEHOLD, NJ 07728-2301
96	CAYUSE TECHNOLOGIES, LLC	JONAS MOSES-CONNER	72632 COYOTE RD PENDLETON, OR 97801-1002
97	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
98	ADVANCED CONSTRUCTION SERVICES INC	RICK MITCHELL	2750 156TH AVE SE NORMAN, OK 73026-9149
99	BETTER LIVING/BETTER HEALTH, LLC	MARLENE THOMAS	2901 W. GIRARD AVENUE SECOND FLOOR PHILADELPHIA, PA 19130-1119
100	TATTERSALL SUPPLY, LLC	JARED WISCHE	997 NW 31ST AVE POMPANO BEACH, FL 33069-1121
101	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
102	2R CONSTRUCTION LLC	ROMANO DILLARD	309 E UNION ST MINDEN, LA 71055-4603
103	HACIENDA HOME CENTERS INC	JOSEPH SANCHEZ	430 S RIVERSIDE DR ESPANOLA, NM 87532-3393
104	SOUTH EASTERN GENERAL CONTRACTING, INC.	RALPHAEL LOCKLEAR	150 SQUARE LN SHANNON, NC 28386-9035
105	CHEROKEE NATION AEROSPACE AND DEFENSE, L.L.C.	JENNYLYNN GATES	470739 HIGHWAY 51 STILWELL, OK 74960-9194
106	CHEROKEE NATION CONSTRUCTION SERVICES, L.L.C.	JENNYLYNN GATES	2 W 2ND ST SUITE 1500-20 TULSA, OK 74103-3123
107	INTERNATIONAL FILTER MANUFACTURING CORP	KAREN WATSON	713 W COLUMBIAN BLVD S LITCHFIELD, IL 62056-3027
108	LEPAGE COMPANY, INC.	JAMES LEPAGE	218 WASHINGTON ST RED BLUFF, CA 96080-3825
109	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839
110	WALDROP CONSTRUCTION INC	MAX WALDROP	1528 LINWOOD BLVD OKLAHOMA CITY, OK 73106-5024
111	GEC TRUCKING & CONSTRUCTION, INC	GENE CARTER SR	5885 RICHARD ST JACKSONVILLE, FL 32216-5968
112	X CELL MANAGEMENT INC.	ALEC ASHTON	700 N JAMES RD COLUMBUS, OH 43219-1840
			1738 ELTON RD STE 215

113	BANNEKER VENTURES LLC	OMAR KARIM	SILVER SPRING, MD 20903-5732
114	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
115	J. I. GARCIA CONSTRUCTION, INC.	CARLOS CASTRO	4717 E HEDGES AVE FRESNO, CA 93703-4708
116	ADVANTIX ENGINEERING CORP	JOSE QUINONES	URB CAGUAX E14 AVE LUIS MUNOZ MARIN CAGUAS, PR 00725-3331
117	AGBAYANI CONSTRUCTION CORPORATION	VINCENT AGBAYANI	88 DIXON CT DALY CITY, CA 94014-2225
118	COMMAND PERFORMANCE CONSTRUCTORS INC	JAMES CHAVEZ	235 E BROADWAY STE 421 LONG BEACH, CA 90802-3162
119	AMERICAN BUILDING COMFORT SERVICES, INC.	MARK ROSALES	1300 GRAVES AVE OXNARD, CA 93030-8014
120	NEMAR TECHNOLOGY GROUP	MIKE MORALES	ARRIGOITIA 450 EXT ROOSEVELT SAN JUAN, PR 00918-2621
121	HUBZONE DOORS, INC.	ASHLEY TAYLOR	1235 PIERRE WAY STE 210 EL CAJON, CA 92021-4650
122	H.E.P. CONSTRUCTION, INC.	SAUD JABALI-NASH	1227 MARION BARRY AVE SE WASHINGTON, DC 20020-6907
123	FARMER CONSTRUCTION L.L.C.	WILLIE FARMER	3041 MCNAUGHTON DR STE F COLUMBIA, SC 29223-1832
124	C2 CONTRACTORS LLC	CORNELIOUS LAMBERTH	405 BANNER AVE GREENSBORO, NC 27401-4301
125	OUTSIDE BOX LLC	CANDICE SOMERVILLE	1428 FLOYD AVE RICHMOND, VA 23220-4618
126	CITI APPROVED ENTERPRISE, LLC	INGRID THIBODEAUX	2439 MANHATTAN BLVD STE 5052 HARVEY, LA 70058-5328
127	IDEAL ENGINEERING SOLUTIONS P.S.C	ISMAEL ROBLES	CARR. 172 KM. 9.4 CIDRA, PR 00739-
128	J.M. CARIBBEAN BUILDERS CORP	JAVIER MORALES	CARR #2 KM. 19.4 INTERIOR BO CANDELARIA TOA BAJA, PR 00951-
129	MICHAEL FRANCO INC	MICHAEL FRANCO	130 EL CHANATE DR STE F CANUTILLO, TX 79835-6621
130	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609

131	MASSILLON CONSTRUCTION AND SUPPLY LLC	THERESA CARR	1245 RAFF RD SW CANTON, OH 44710-1455
132	X CELL MANAGEMENT INC	ALEC ASHTON	64601 STATE ROUTE 56 CREOLA, OH 45622-8957
133	BETMAR CONSTRUCTION	MARY BENNETT	13376 NOEL LN GRASS VALLEY, CA 95945-8845
134	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
135	REFRIGERATION ENGINEERING, INC.	HECTOR GONZALEZ	CARR. 842 KM 1.9 CAMINO LOS ROMEROS CAIMITO SAN JUAN, PR 00926-
136	JTC SERVICES GUAM INC.	TOM CAMACHO	102 HAGATNA, GU 96910-7104
137	OBRATEC CONTRATISTA GENERAL INC	JOSE GARCIA	CARR. 842 KM 1.9 LOTE 4 CAMINO LOS BIGIOS BARRIO CAIMITO SAN JUAN, PR 00926-
138	CRUTCHO CREEK FARMS LLC	RAY WILLIAMS	6625 NE 10TH ST OKLAHOMA CITY, OK 73110-3339
139	DEL-MAR SOLUTIONS INC	JEAN EXANTUS	2478 SAND LAKE RD ORLANDO, FL 32809-7672
140	WARFEATHER, LLC	JOHN OGLESBEE	10250 S 287TH EAST AVE COWETA, OK 74429-6414
141	M2 FEDERAL INC.	MICHAEL SCHEIERN	705 W HOPKINS ST STE 112 SAN MARCOS, TX 78666-4380
142	HARTHY COMPANY, LLC	VERNON IRVING	9341 PHILADELPHIA RD STE D ROSEDALE, MD 21237-4156
143	US ECO PRODUCTS CORP	DOREEN BLADES	143 ESSEX ST STE 210 HAVERHILL, MA 01832-5553
144	MARK-VII ENTERPRISES, INC.	MARK SANTO	4028 HAMILTON ST OMAHA, NE 68131-1106
145	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
146	COMP ENVIRONMENTAL, INC.	YANLING CAROLINE WANG	5615 RECKER HWY WINTER HAVEN, FL 33880-1267
147	MEDVED GLOBAL INC	MICHELLE HICKS	24363 ROAD L CORTEZ, CO 81321-8805
			777 W CHEROKEE ST

148	CND LLC	JENNYLYNN GATES	CATOOSA, OK 74015-3235
149	PACIFIC UNLIMITED, INC.	MICHAEL LIMTIACO	3305 NEPTUNE AVE. BARRIGADA, GU 96913
150	VANESSA ACIERTO	VANESSA ACIERTO	LOT 25-1 664 CHALAN PALE RAMON HAYA ROUTE 1 YIGO, GU 96929-2417
151	TRITON SUPPLY INC	TRACI GERVASE	533 AUSTIN ST GRAND PRAIRIE, TX 75051-1914
152	RYMARC CONSTRUCTION INC	BRUCE LOPEZ	3440 PRINCETON DR NE STE 217 ALBUQUERQUE, NM 87107-2028
153	ESSNOVA SOLUTIONS, INC.	SRIDHARA GUTTI	1500 1ST AVE N UNIT 47 BIRMINGHAM, AL 35203-1873
154	A. GARCIA & CO., LLC	ROSA GARCIA	654 AVE MIRAMAR ARECIBO, PR 00612-4362
155	BARTKOWSKI LIFE SAFETY CORP	LAUREN SUSTEK	140 W 168TH ST SOUTH HOLLAND, IL 60473-2839
156	C. ORTIZ, CORP	CARMEN ORTIZ	4021 JOHNSON AVE EL PASO, TX 79930-6816
157	CASCADE SORBENT PRODUCTS INC	AL MARTINA	500 ALA MOANA BLVD STE 7400 HONOLULU, HI 96813-4902
158	CORONADO DISTRIBUTION COMPANY, INC.	CARLOS FLORES	205 W 35TH ST STE K NATIONAL CITY, CA 91950-7921
159	LAURA KAY DUNBAR, INC.	LAURA DUNBAR	394 E MAIN ST STE 201 VENTURA, CA 93001-4961
160	ACTION ROOFING HAWAII LLC	BOBBY ANDERSON	89-213 LEPEKA AVE WAIANAE, HI 96792-4113
161	GENESIS COMMUNICATIONS INC	IRENE GONZALEZ	CARR 422 KM 2.2 MOCA, PR 00676-
162	R & M GOVERNMENT SERVICES INC	RALPH ARCHETTI	650 MONTANA AVE STE A LAS CRUCES, NM 88001-4294
163	PANACEA CONSTRUCTION GROUP LLC	KEITH PLASTER	30 PINION CT DUBOIS, WY 82513-8926
164	TL STINSON & ASSOCIATES LLC	TAMIKA CHURCHILL	6216 BENTGRASS PL LOCUST GROVE, GA 30248-7064
165	APPLIED AUTOMATION, LLC	SCOTT MILES	1064 VAN BUREN AVE STE 1 INDIAN TRAIL, NC 28079-5569
			2026 S CALLAGHAN RD

166	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	SAN ANTONIO, TX 78227-2265
167	SERVICES, INC WHICH WILL DO BUSINESS IN CALIFORNIA AS ACS-	JEFF GINGRICH	4260 LINDA VISTA DR FALLBROOK, CA 92028-9494
168	NEW DOMINION CONSTRUCTION LLC	ADRIAN LAWSON	2525 POINTE CENTER CT STE 100 DUMFRIES, VA 22026-2277
169	CINTEOT INC.	CHRISTINA HUNT	75 S MAIN ST CHAMBERSBURG, PA 17201-2224
170	SANDOW CONSTRUCTION INC	KASMERA SANTIAGO-DOWNEY	4300 48TH ST BLADENSBURG, MD 20710-1108
171	BCH BUILDERS LLC	BROOKS JOHNSON	201 1ST ST E PARK RAPIDS, MN 56470-1612
172	BAHFED CORP	KEN PAUL	1000 SW BROADWAY STE 1110 PORTLAND, OR 97205-3063
173	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
174	IMPERIAL CONSTRUCTION AND EXCAVATING, LLC	GREGORY WILLIAMS	526 RAILROAD ST E DOUGLAS, GA 31533-1608
175	OAKMONT CONTRACTING LLC	WILLIAM TOSE	1100 WICOMICO ST STE 500 BALTIMORE, MD 21230-2075
176	CORBARA BUILDING GROUP CORPORATION	MARCO MARROQUIN	711 A AVE NATIONAL CITY, CA 91950-2228
177	FRONT RANGE CONSTRUCTION INC	ALBERT ROGERS	3730 SINTON RD STE 211 5075
178	SUSTECH LLC	ANGEL VAZQUEZ	JUST TRUJILLO ALTO, PR 00976-
179	IDEAL SYSTEM SOLUTIONS, INC.	SHELIA HERSHEY	12 ROCKY SLOPE DR SANTA FE, NM 87508-1353
180	REON INC	MATT PERRY	14502 GREENVIEW DRIVE STE 300 LAUREL, MD 20708-3287
181	EAST COAST TECHNOLOGIES, LLC	SCOTT ANDERSON	303 W MADISON ST BALTIMORE, MD 21201-4614
182	CREATIVE BUILDS CORPORATION	RODOLFO FARBER	925 B ST STE 601 SAN DIEGO, CA 92101-4603
183	TEAM HENRY ENTERPRISES, LLC	DEVON Henry	11401 SW 40th St Ste 319 Miami, FL 33165-3339
184	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
			4800 STRAWBERRY LN

185	MC COLEMAN GROUP LLC	ANN FANGMAN	LOUISVILLE, KY 40209-1455
186	BANNEKER VENTURES, LLC	OMAR KARIM	3901 PARK HEIGHTS AVE STE 201 BALTIMORE, MD 21215-7013
187	HUGH AND ASSOCIATES INC	VICTOR GILKES	1928 BENNING RD NE # 2 WASHINGTON, DC 20002-4724
188	UNAMI LLC	LAURA PONDER	7060 S YALE AVE STE 707 TULSA, OK 74136-5717
189	1 POINT PROCUREMENT SOLUTIONS, LLC	SHAYLA COLES	1225 SNAPPS FERRY RD GREENEVILLE, TN 37745-4099
190	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
191	RV GLOBAL SOLUTIONS INC.	RAHUL GANGU	247 E FRONT ST STE 1 TRENTON, NJ 08611-
192	A AND W ELECTRICAL AND REFRIGERATION A/C INC	WILBERTO ROSARIO	CARR. 155 KM 55.4 URB. ALIANZA, CALLE AZUCENA, BARRIO BARAHONA MOROVIS, PR 00687-
193	HORIZON SOLUTION COMPANY	JESSICA DERENBERGER	311 ADAMS ST RAEFORD, NC 28376-2701
194	MILLER ELECTRIC COMPANY INC.	ANNABELLE MILLER	3945 GLEN ST RENO, NV 89502-4966
195	ARROWHEAD GLOBAL LLC	CHAD HILL	22033 US HIGHWAY 19 N CLEARWATER, FL 33765-2362
196	PREMIER MECHANICAL PRODUCTS LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314
197	KRANE SOLUTIONS, INC	SONIA LEON	CARR #2 KM. 39.9 VEGA BAJA, PR 00694-
198	ACCUGOV, INC	MATTHEW PAGLUICA	160 SACRAMENTO, CA 95827-2530
199	HONG YE RENTAL & CONSTRUCTION LTD	MICHAEL SHEU	3786 AFETNAS ROAD SAIPAN, MP 96950-
200	GUAM INSPECTION AND CERTIFICATION BUREAU, INC	THOMAS O'CONNOR	156 PEREZ WAY APT 13 TAMUNING, GU 96913-4053
201	DRIVEN CONTRACTORS LLC	JOSEPH LOOCKLEAR	DR MAXTON, NC 28364-1246
202	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
			7836 PARK AVE

203	JUSTIN J. REEVES, L.L.C	JUSTIN REEVES	HOUMA, LA 70364-3172
204	ENVIRONMENTAL SOLUTIONS, L.L.C.	JENNYLYNN GATES	2 W 2ND ST STE 1500-24 TULSA, OK 74103-3123
205	CRUZ DONNA	DONNA CRUZ	215 SANTA ANA ST ASAN, GU 96910-
206	THE AKANA GROUP INC.	CHAD JOHNSON	9950 WESTPARK DR STE 622 HOUSTON, TX 77063-5206
207	VENTURA CLIMATE CONTROL COMPANY, INC	MICHELLE MENDEZ	720 E SANTA MARIA ST SANTA PAULA, CA 93060-3634
208	G & E INDUSTRIAL SUPPLIES INC	AJITH NAIR	857 PENDALE RD EL PASO, TX 79907-2719
209	JJ CONTRACTING CORP	JERED MUOIO	201 GENESEE ST STE 200 AUBURN, NY 13021-3363
210	TEKSOL INTEGRATION GROUP INC	MIGUEL GONZALEZ	CARR 64 KM 4.3 BO SABANETAS MAYAGUEZ, PR 00680-
211	KHOTOL SERVICES CORPORATION	DAVID PLAINS	3900 C ST STE 100 ANCHORAGE, AK 99503-5962
212	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
213	RIZA CONSTRUCTION INC	COREY AVENS	228 CHAPARRAL TRL JACKSONVILLE, NC 28546-9407
214	ECHELON DISTRIBUTION LLC	STEVE NODES	1230 HIGH ST STE 215B AUBURN, CA 95603-5044
215	COMP ENVIRONMENTAL INC	CAROLINE WANG	4701 SANGAMORE RD STE N100 BETHESDA, MD 20816-2558
216	US WEST CORP	BRANDON EVERETT	1390 N OLD PACIFIC HWY MYRTLE CREEK, OR 97457-9353
217	COMPUTER ZEN LLC	KENNETH DAHL	403 MAIN ST SALMON, ID 83467-4218
218	PAULSON PLUMBING & MECHANICAL, LLC	PAULETTE BACA	1211 4TH ST SW ALBUQUERQUE, NM 87102-4368
219	RP NATIVE CONSTRUCTION LLC	RANDALL PATRICK	8045 OLD LAKE RD BOLTON, NC 28423-8991
220	KIAN CORP	PEJMAN GOUNIAI	1024 PALE SAN VITORES RD UNIT 210 GRAND PLAZA HOTEL TUMON, GU 96913-4019

221	CAPITAL COLORS, LLC	VERNON RAMEY	9611 COTTRELL TER SILVER SPRING, MD 20903-2229
222	ABELITA LLC	ADRIENE WRIGHT	203 YOUNG ST TALLAHASSEE, FL 32301-5437
223	ONE TOUCH BUILDING MAINTENANCE LLC	JULIAN CLAYBOURNE	221 N 18TH ST KANSAS CITY, KS 66102-4916
224	ISLAND CERTS CORPORATION	NANCY BARNHOUSE	203 TAMUNING, GU 96913-4429
225	BRIGHT REGARDS, LLC	YVONNE HERRERA	70 INDUSTRIAL PARK DR STE 3E WALDORF, MD 20602-3739
226	AVIATE ENTERPRISES, INC.	TIMOTHY DEVINE	5844 PRICE AVE MCCLELLAN, CA 95652-2407
227	GREEN LEAF BUILDERS INC	JOHN SANDERS	310 E TAYLOR DR SALLISAW, OK 74955-1927
228	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	404 HAUPT SQ SE LEESBURG, VA 20175-2722
229	CAROLINA GROUP PROPERTIES LLC	RONALD JAMES	701 S GEORGE ST STE 2 GOLDSBORO, NC 27530-5717
230	ROCK SOLID SOLUTIONS, LLC	ROLANDA AMOS	2124 CLIFF DR NASHVILLE, TN 37218-2814
231	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
232	WISE HEATING & COOLING INC	RONALD VITTITOW	2268 S M 76 WEST BRANCH, MI 48661-8700
233	WEGOALLPLACES LLC	MAURICE WHITE	4828 N ARMENIA AVE STE B TAMPA, FL 33603-1437
234	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
235	HARDY STEPHENSON LLC	STEVE HARDY	4215 CARTERS FERRY RD E MILAM, TX 75959-3416
236	OUTSIDE THE BOX LLC	CANDICE SOMERVILLE	433 EXETER DR BIRMINGHAM, AL 35206-2845
237	THE IMPACT GROUP LLC	SULAIMAN HARRIS	3102 35TH ST NE WASHINGTON, DC 20018-1628
238	GC WORKS INC	LANCE WAYNE	1820 SW 3RD AVE MIAMI, FL 33129-1417
	CAROLINA MICROWAVE		797 SUNNY SLOPE DR # 2

239	ASSOCIATES, INC	MIKE TADROS	COWPENS, SC 29330-9647
240	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
241	CONSTRATEGY LLC	NABIL ABDELLA	320 FLORIDA AVE NE APT 414 WASHINGTON, DC 20002-6940
242	NATIVE STAR GROUP, INC	JOSH PETERSON	17406 E 425 RD JAY, OK 74346-3735
243	COMP ENVIRONMENTAL INC	YANLING CAROLINE WANG	6731 WHITTIER AVE STE B-230 MC LEAN, VA 22101-4525
244	POTAWATOMI DEFENSE OPERATIONS LLC	AARON FINNIGAN	3215 W STATE ST STE 309C1 MILWAUKEE, WI 53208-3364
245	DUWAMISH SERVICES LLC	ZACH MARTIN	7421 5TH AVE S SEATTLE, WA 98108-4113
246	INVESTMENTS LLC		
247	APPLIED AUTOMATION LLC	ALDEN MILES	110 S MARLBORO ST BENNETTSVILLE, SC 29512-4032
248	ELYSIAN PROJECT MANAGEMENT LLC	MARIANNE ALLEN	3076 W 1000 N REXBURG, ID 83440-3370
249	QUEST POWER INTERNATIONAL, LLC	PATRICIA ARAUZ-CORROW	36 W PINE ST STE 202C ORLANDO, FL 32801-2612
250	BCW GROUP, L.L.C	SHANE CESSNUN	1903 W ARKANSAS ST DURANT, OK 74701-5625
251	PACIFIC NORTHWEST MOBILE WELDING LLC	JOY TAYLOR	4801 RODEO DR CLEVELAND, OK 74020-5757
252	SNODGRASS CONTRACTING LLC	JEFF SNODGRASS	1910 TOWNE CENTRE BLVD STE 250 ANNAPOLIS, MD 21401-3599
253	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
254	KHOTOL SERVICES CORPORATION	DAVID PLAINS	123 E GAY ST STE A7 WARRENSBURG, MO 64093-1845
255	MGS CONSTRUCTION SERVICES INC.	DIANE SANDERS	310 E TAYLOR DR SALLISAW, OK 74955-1927
256	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
257	KIRA INFRASTRUCTURE LLC	RICHARD RINEHART	1150 ACADEMY PARK LOOP STE 230-H1 3714

258	SDVOSB MATERIALS TECHNOLOGY & SUPPLY LLC	HARRISON KENDALL	1801 PALMDALE CT FORT MYERS, FL 33916-2309
259	ARCON LLC	JONATHAN GONZALEZ	346 CALLE VILLA PONCE, PR 00730-2716
260	CHIRICAHUA PROCUREMENT LLC	JOHN WOFFARD	320 GOLD AVE SW STE 806 ALBUQUERQUE, NM 87102-3202
261	MAINTENANCE SERVICES 360 LLC	JOHN BOWEN	5151 NW 159TH ST STE F MIAMI LAKES, FL 33014-6349
262	SHADOWFAX INC	JENNIFER DAVIS	1725 OLD HOUSTON RD ARLEY, AL 35541-4748
263	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
264	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
265	FIRST PLACE SUPPLY INC	PATRICIA CORTHELL	3301 CLINE ST HOUSTON, TX 77020-6123
266	SOLVANCY LLC	ANDERSEN DELINOIS	685 CITADEL DR E STE 29012 5314
267	EASTHILL CONSTRUCTION CORP	VEDANT BHANDERI	17 ACADEMY ST STE 515 NEWARK, NJ 07102-2932
268	Ashelyn Group, LLC, The	VANESSA L HALSEY	600 Six Flags Dr Ste 437 Arlington, TX 76011-6346
269	AOR LOGISTICS, LLC	PAUL NESBIT	130 W MAIN ST STE 206 ORANGE, VA 22960-1555
270	MILLER ELECTRIC COMPANY INC	ANNABELLE MILLER	2730 SW 57TH ST STE C TOPEKA, KS 66609-9417
271	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
272	F & D FEDERAL LLC	MOHAMMED ALFROOKH	161 FORT EVANS RD NE STE 325 LEESBURG, VA 20176-3375
273	JUSTIN J REEVES LLC	JUSTIN REEVES	159 BRENDA LN INLET BEACH, FL 32461-8153
274	A & A GENERAL CONTRACTOR CORP	IVELISSE MORENO CRESPO	ROSA SECTOR MONSERRATE VEGA ALTA, PR 00692-
275	MILLER ELECTRIC CO INC	ANNABELLE MILLER	18 N UNIVERSITY AVE STE 40 PROVO, UT 84601-8406

276	ZBS & ASSOCIATES LLC	TANISHA JEWELL	510 PLAZA DRIVE STE 1245 ATLANTA, GA 30349-7239
277	Miller Electric Company Inc.	Annabelle Miller	102 SUSANVILLE, CA 96130-8619
278	HYBRID STEEL DESIGN LLC	ASHLEY CLARK	1711 MAIN ST FORT BENTON, MT 59442-8746
279	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
280	CAM-KOK CONTRACTOR GROUP INC	KEYLA MARIN	CARR 830 KM 4 3 BO CERRO GORDO BAYAMON, PR 00956-
281	2LYONS AEROSPACE LLC	MIKE CANTAVE	3329 NW 55TH ST FORT LAUDERDALE, FL 33309-6306
282	PROPERTY IMPROVEMENT OF NEW BRUNSWICK LLC	GREGORY REID	40 W LAFAYETTE STREET TRENTON, NJ 08608-2011
283	GREYSTONE SERVICES LLC	FAIZAH SAYED	6195 LEWIS AVE TOLEDO, OH 43612-4341
284	GUAM SPECS CORPORATION	UZOAMAKA ODIMEGWU MBAKWEM	120 CHALAN PADERON BARRIGADA, GU 96913-
285	ALL PHASE SOLUTIONS, LLC	SAL RABAH	1849 LONGMONT DR WAKE FOREST, NC 27587-5965
286	AXC INNOVATIONS INC	ANH THU DOAN	1312 E GUAVA AVE LOMPOC, CA 93436-6213
287	WR5 LLC	SHUNTELL ROBINSON	9696 HIGHWAY 5 ARLINGTON, AL 36722-3314
288	TAC2 GLOBAL LLC	CHRISTOPHER STURM	600 CLEVELAND ST STE 347 CLEARWATER, FL 33755-4151
289	AVANTE ENGINEERING LLC	RAFAEL PERALES	URB VALLE TOLIMA PARQUE INDUSTRIAL OESTE AVE. INNOVACION, SOLAR 16 CAGUAS, PR 00727-
290	CJ MECHANICAL LLC	CARMELO GARCIA	CARR 814 KM 0.4 BO ANONES NARANJITO, PR 00719-
291	PUYENPA CONSTRUCTION, LLC	EMILY STOUT	511 DUCKWATER FALLS RD DUCKWATER, NV 89314-9800
292	ENDEVELOPMENT L.L.C.	AARON HAMPTON	1 CORWIN CT STE 103 NEWBURGH, NY 12550-5176
			CARR 102 KM 40.2 SAN FRANCISCO PLAZA OFICINA 203-204

293	ENCO GROUP LLC	JULIO SOTO	SABANA GRANDE, PR 00637-
294	Allan Santiago	Allan Santiago	143 Carlos Lane STE A Tamuning, GU 96913-4339
295	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	5470 S MONROVIA AVE TUCSON, AZ 85706-2120
296	M & G CLEANING & PAINTING SERVICES INC.	MARIA GAITAN	4030 6TH ST BALTIMORE, MD 21225-2108
297	ALL PHASE SOLUTIONS, LLC	SAL RABAH	200 SAN JUAN, PR 00901-1660
298	VULCAN CONSTRUCTION LLC	DAVID PATTERSON	1129 E 9TH ST JACKSONVILLE, FL 32206-4007
299	GC WORKS INC	LANCE WAYNE	9894 BISSONNET ST STE 241 HOUSTON, TX 77036-8239
300	GEMCRAFT CONTRACTING LLC	BRYAN KUTTER	201 1ST ST E, STE 201 PARK RAPIDS, MN 56470-1612
301	JUSTIN J REEVES LLC	ASHLEY MEISSNER	21711 FM 1093 RD RICHMOND, TX 77407-9527
302	LALINI ENTERPRISES LLC	LALINI PILLAY	1400 MONTAGUE ST NW WASHINGTON, DC 20011-2870
303	NEUROTH CONSTRUCTION INC.	ROBERT NEUROTH	1165 LINDA VISTA DR STE 102 SAN MARCOS, CA 92078-3821
304	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431
305	ADVANTAGE CONTRACTING, LLC	ANDREA BALDWIN	504 RANKIN ST ANDALUSIA, AL 36420-4821
306	KAIVA SERVICES, LLC	CAMERON ECHOHAWK	6060 W 3650 N STE 400 IVINS, UT 84738-6618
307	GUYTON INDUSTRIES LLC	GUYTON STONE	10691 US HIGHWAY 441 N OKEECHOBEE, FL 34972-7522
308	B & H CONTRACTING COMPANY, INC.	DAVID MCMINDES	2512 CONTRACTORS LOOP FORT BRAGG, NC 28307-
309	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
310	BERCORP MECHANICAL CONTRACTORS CORP.	OSCAR BERMONTY	1250 AVE PONCE DE LEON STE 1010 SAN JUAN, PR 00907-3914
311	All Phase Solutions, LLC	SALEH RABAH	515 M St Se Bldg 74-103 Washington, DC 20003-3456

312	DOC DEVELOPMENT INC	RADCLIFF QUARTERMAN	300 S 1ST ST STE 302 LEESVILLE, LA 71446-4372
313	ESTIME MANAGEMENT CORPORATION	LUNIQUE ESTIME	2367 MCCULLOH ST BALTIMORE, MD 21217-3542
314	MAUKA CONTRACTING LLC	AMBER STRONG	3084 POIPU RD KOLOA, HI 96756-9573
315	MATRIX BUILDING, LLC	RICK CAMARENA	13334 SEAWAY RD STE 201 GULFPORT, MS 39503-5290
316	BROWN CONSTRUCTION INC	JAMES BROWN	68 BANGOR ST HOULTON, ME 04730-1641
317	EPCINNOVATIONS LLC	RYAN FRALISH	82 CALLE 3 ISABELA, PR 00662-4169
318	PER-GEESH CONSTRUCTION CORPORATION	PAMELA AMES	190 KLAMATH BLVD KLAMATH, CA 95548-9322
319	GC WORKS INC.	LANCE WAYNE	38 ROMNEY ST STE 103 CHARLESTON, SC 29403-3825
320	PUYENPA CONSTRUCTION LLC	EMILY STOUT	207 E RIDGEVILLE BLVD MOUNT AIRY, MD 21771-5257
321	DOUBLE R GENERAL CONTRACTING, LLC	JOHN REED	321 COUNTY ROAD 327 ROSEBUD, TX 76570-2212
322	ALL PHASE SOLUTIONS, LLC	SALEH RABAH	105 VALE ST POMONA PARK, FL 32181-2452
323	SOLAR STEP LLC	LOURDES MARCANO	REPARTO TERESITA U-10 CALLE 20 BAYAMON, PR 00961-8352
324	RIZA CONSTRUCTION INC.	COREY AVENS	400 W 7TH ST STE 105A BLOOMINGTON, IN 47404-3900
325	RANGE CONSTRUCTION LLC	YOVANI SALOME-SANCHEZ	1345 K ST SE UNIT 203 WASHINGTON, DC 20003-4543
326	PUYENPA CONSTRUCTION LLC	EMILY STOUT	813 MAIN ST PORTAGE, PA 15946-1757
327	PUYENPA CONSTRUCTION LLC	EMILY STOUT	109 W MAIN ST STE E CLINTON, NC 28328-4046
328	CHIRICAHUA PROCUREMENT LLC	MIKE GANN	2315 E GORE BLVD LAWTON, OK 73501-6116
329	PIERCE & SONS CONSTRUCTION, LLC	NATHAN PIERCE	3686 BARLOW RD LUMBER BRIDGE, NC 28357-7972
			5009 E 39TH ST

330	MD DOYNE CONSTRUCTION LLC	MASON DOYNE	LITTLE ROCK, AR 72206-3703
331	NEW DOMINION CONSTRUCTION, LLC	BRYAN DISEATI	9668 MADISON BLVD STE 142 MADISON, AL 35758-9127
332	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
333	FEDERAL CONSTRUCTION OF GA LLC	JOHN STEWART	635 LONG BRANCH TRL RANGER, GA 30734-6083
334	HAMILTON'S SQUARE LLC	WHITNEY WHITE	321 S FRAZIER ST PHILADELPHIA, PA 19143-1311
335	PUYENPA CONSTRUCTION LLC	EMILY STOUT	9258 CULEBRA RD STE 140-8 SAN ANTONIO, TX 78251-2871
336	POTAWATOMI DEFENSE OPERATIONS, LLC	AARON FINNIGAN	101 W BENSON BLVD STE 303 ANCHORAGE, AK 99503-3937
337	A ROCK CONSTRUCTION CO INC	PERCY MCDONALD	417 PERRY ST HELENA, AR 72342-3238
338	UNAMI LLC	LAURA PONDER	9300 NORMANDY BLVD STE 510 JACKSONVILLE, FL 32221-5563
339	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
340	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
341	HACIENDA HOME CENTERS INC	JOSEPH SANCHEZ	3511 GIBSON BLVD SE ALBUQUERQUE, NM 87106-1627
342	SHAI LLC	LAWRENCE HAMMOND	4041 POWDER MILL RD STE 116B CALVERTON, MD 20705-3106
343	SHADES OF PARADISE LLC	MARILOU POLENDEY-SCOTT	150M E ADDENG ST DEDEDO, GU 96929-6561
344	GRANITE GROUP, LLC	CINDY WILEN	19207 PRAIRIE HILLS RD BELLE FOURCHE, SD 57717-6105
345	METALECTRIK MANUFACTURING CORP	NATALIA CORDERO	PARCELAS SELGAS CARR. 642 KM. 11.0, CALLE ARIZMENDI #1 PARQUE INDUSTRIAL FLORIDA, PR 00650-
346	ADAKU LLC	LETISHA CARTER	3511 INVERNESS DR GREENSBORO, NC 27406-5715
	DAY & NIGHT FINANCIAL SERVICES,		352 UNIVERSITY AVE SW SUITE W133

347	INC	JOSE MUSE	ATLANTA, GA 30310-3698
348	METRO CONSTRUCTION & PROJECT MANAGEMENT LLC	CARLOS VILA	135 CALLE CARACOL ALTURAS DE M CABO ROJO, PR 00623-3186
349	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
350	KUNERT ELECTRIC, LLC	CHRISTOPHER LAMONT	200 NE CHANNON AVE ROSEBURG, OR 97470-1489
351	MIMIC MANUFACTURING, LLC	ROBERT WHITE	477222 E 1090 ROAD ROLAND, OK 74954-5034
352	AHTNA BUILDERS, LLC	BERNARD WONG	1100 N LITTLE BROOK LN STE A-100 PALMER, AK 99645-8931
353	CARVER WATER TECHNOLOGY LLC	TRAVIS INGRAHAM	333 N FALKENBURG RD STE B226 TAMPA, FL 33619-7894
354	G & C EQUIPMENT CORP	JASON YANO	879 W 190TH ST STE 500 GARDENA, CA 90248-4225
355	MIMIC MANUFACTURING, LLC	ROBERT WHITE	102 PITCHFORD LN HEAVENER, OK 74937-7489
356	STARLIGHT ADVERTISING SPECIALTIES PROMOTION, INC	ALEJANDRO CUEVAS	NEBRASKA CAGUAS, PR 00725-2244
357	VENTURA LOW VOLTAGE & SECURITY LLC	SHERRY CARGNINO	316 E VINCE ST VENTURA, CA 93001-1760
358	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
359	GOVERNMENTAL PURCHASING SOLUTIONS LLC	SOPHIA BROWNING	3435 LOVELACEVILLE ROAD PADUCAH, KY 42001-5854
360	MCKENZIE PROCUREMENT L.L.C.	JACOB MCKENZIE	4602 TUCSON DR INDIANAPOLIS, IN 46241-6271
361	CHUGACH PACIFIC SOLUTIONS LLC	WILLIAM MARTZ	189 E SIKET ST DEDEDO, GU 96929-
362	GH PARTS & COMPONENTS, INC.	HOPE PATTERSON	2409 N BROAD ST SELMA, AL 36701-4010
363	DYLAN MECHANICAL CONSTRUCTION SERVICES INC	MATTHEW HUNTER	451D GOGUE DR ORDOT, GU 96910-
364	HALL & TOWING LLC	JAMES HALL	678 SEVEN BROTHERS RD EL DORADO, AR 71730-6090
365	SPECTRUM BUILDERS & RENOVATIONS, INC.	TASAWWAR KHAN	3841 N FREEWAY BLVD STE 120 SACRAMENTO, CA 95834-1968

366	PATRICK'S PLUMBING & HEATING, INC.	PATRICK CARLSON	47023 SCOUT CAMP RD ATLANTIC MINE, MI 49905-8008
367	TRUSOUTH SERVICES LLC	DAVID YATES JR	23 MANOR HILL RD NATCHEZ, MS 39120-9349
368	PHARMA PARAPLUIE LLC	ABIDAH OTTLEY	7736 W GRANADA RD PHOENIX, AZ 85035-5066
369	CPSGOV, LLC	MEGAN HALLDORSON	72632 COYOTE RD PENDLETON, OR 97801-1002
370	SUNLIGHT ENTERPRISES CO., INC.	ADRIAN PORRAS	7250 BROGAN DR STE A EL PASO, TX 79915-1346
371	POCOSIN BAY INDUSTRIES, L.L.C.	MARK HUNT	3888 MIDWAY RD MAXTON, NC 28364-9596
372	RED FEATHER FEDERAL, LLC	MELISSA COOPER	2313 S BROADWAY AVE OKLAHOMA CITY, OK 73109-6023
373	KINGDOM SOLUTIONS CORP	ELIAS RIVERA	GORDO BAYAMON, PR 00961-
374	MYFLOGISTICS LLC	QUENTIN BROWN SR	17 AFFIRMED WAY NEWNAN, GA 30263-2464
375	AHTNA COMMERCIAL SERVICES LLC	TIM FINNIGAN	1100 N LITTLE BROOK LN BLDG B, STE B-100 PALMER, AK 99645-8931
376	GT ENTERPRISES OF VA LLC	GRANT MORRIS	1350 STONEY MOUNTAIN RD MARTINSVILLE, VA 24112-1798
377	JIREH LOGISTIC ASAP LLC	RODOLFO CADENA	402 N CEMETERY RD APT G2 DAWSON, TX 76639-3429
378	THE PARTNERS CONTRACTING GROUP INC	JORDAN BULL	131 N GARDEN AVE CLEARWATER, FL 33755-4119
379	MILCON TECHNOLOGIES, LLC	DAVID GIRALDO	2231 COUNTY HIGHWAY 2 LAUREL HILL, FL 32567-4500
380	ANOMALYTICS SOLUTIONS LLC	CYRUS HANSON	9 W FRANKLIN AVE APT 306 MINNEAPOLIS, MN 55404-2594
381	ENTERPRISE SOLUTIONS AND ANALYTICS, LLC	LOK ACHARYA	2932 BRIAROAK DR DULUTH, GA 30096-8942
382	BUILD A BRIDGE PROPERTIES LLC	CRYSTAL PARSLEY	2001 HARLEM AVE BALTIMORE, MD 21217-1012
383	DEVGROUP ONE LLC	JULIO WHITE	304 THONOTOSASSA, FL 33592-3892
384	GSI LLC	BLAIR BRYLAWSKI	4551 TANGLEWOOD DR BLADENSBURG, MD 20710-1017
			3000 PRESIDENTIAL DR STE 170

385	CINTEOT INC.	THOMAS HUNT	FAIRBORN, OH 45324-6817
386	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133
387	M - W ELECTRIC, INC.	KIMBERLY WOODS	605 E 4TH AVE RED SPRINGS, NC 28377-1668

#	Name of Firm	Contact	Address and City, State Zip
1	ASA ENVIRONMENTAL PRODUCTS INC	ANA SCHNEIDER	22 BAYVIEW AVE STE 46 STONINGTON, CT 06378-1169
2	SOUTHERN SAFETY SUPPLY LLC	SARA SIZEMORE	207 CENTER PARK DR STE 2090 KNOXVILLE, TN 37922-2136
3	JULIUS KAAZ CONSTRUCTION CO INC	JODY KAAZ	716 CHEROKEE ST LEAVENWORTH, KS 66048-2467
4	BAKER & ASSOCIATES INC	LEANNE BROWN	60 COMPARK RD DAYTON, OH 45459-4802
5	WALKER MILLER EQUIPMENT COMPANY, INC.	CONNIE MILLER	4400 N ORANGE BLOSSOM TRL ORLANDO, FL 32804-1903
6	ECTRON CORP	KARY DODD	9340 HAZARD WAY SUITE B2 SAN DIEGO, CA 92123-1228
7	JO-KELL INC.	MARY KELLY	628 INNOVATION DR CHESAPEAKE, VA 23320-3846
8	SCIENTIFIC SALES, INC.	VICKI DYER	130 VALLEY CT OAK RIDGE, TN 37830-8046
9	DCT, INCORPORATED	CHERYL BERNARDI	501 E CHEROKEE AVE MCALESTER, OK 74501-5335
10	MPI FASTECH, LLC		
11	IDEAL ELECTRICAL SUPPLY CORPORATION	JANICE ADAMS	3515 V ST NE WASHINGTON, DC 20018-1530
12	IDEAL SYSTEM SOLUTIONS INC	CAROL IRISH	4646 MAIN ST PEQUOT LAKES, MN 56472-4405
13	PEACHTREE MECHANICAL, INC.	RICHARD DENNEY	535 MARKSMEN CT FAYETTEVILLE, GA 30214-5918
14	SMARTNET, INC.	LYNNE AUSTIN	211 EDWARDS FERRY RD NE LEESBURG, VA 20176-2305
15	M-80 SYSTEMS, INC.	JESSICA LEON GUERRERO	176 W MARINE CORPS DR ASAN, GU 96910-5068
16	CMC & MAINTENANCE INC	JASON GATCHELL	4 UNION ST STE 1 BANGOR, ME 04401-6457
17	STREET LEGAL INDUSTRIES, INC	LISA BISESE	102A JEFFERSON CT OAK RIDGE, TN 37830-4821
18	MW SERVICES INC	MARIE WILLIS	42208 REMINGTON AVE TEMECULA, CA 92590-2549

19	DOTZLER CONSTRUCTION, INC.	ARLENE DOTZLER	216 W WALNUT AVE LOMPOC, CA 93436-6750
20	ADVANCED SOLUTIONS GROUP, LLC	DENISE MITCHELL	47 CRESTWOOD RD STE 1 KAYSVILLE, UT 84037-1445
21	PATRICIA I. ROMERO, INC.	PATRICIA ROMERO	1248 COOLIDGE AVE NATIONAL CITY, CA 91950-4332
22	HUNTER PACIFIC GROUP	CELIA HUNTER	2742 LANING RD SAN DIEGO, CA 92106-6430
23	ANA SOURCING LLC	KAYLIN CHESTNUT	20 RICHEY AVE OAKLYN, NJ 08107-2306
24	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
25	ALASKA STAIRLIFT & ELEVATOR LLC	DARCY BENNETT	1200 E 76TH AVE STE 1201 ANCHORAGE, AK 99518-3219
26	M-PAK, INC.	DEBBIE COOLEY	11255 CAMP BOWIE WEST BLVD STE 111 ALEDO, TX 76008-3692
27	AMERICAS BEST ELECTRICMART INC	DAVID HICKS	129 W HARMON INDUSTRIAL PARK RD STE D TAMUNING, GU 96913-4166
28	PACIFIC OFFICE SOLUTIONS LLC	JULIE VALDEZ	3403 S 8TH AVE YAKIMA, WA 98903-9513
29	MELTECH CORPORATION, INC.	JOANNE KRISHACK	3321 75TH AVE STE G LANDOVER, MD 20785-1519
30	MERCOM, INCORPORATED	DUSTIN FUGETT	1067 PETIGRU DR PAWLEYS ISLAND, SC 29585
31	ADVANCED INTEGRATION GROUP, INC.	DONNA CHAPPEL	1 MCCORMICK RD STE A MC KEES ROCKS, PA 15136-1429
32	VIGIL CONTRACTING, INC.	SHANNAN VIGIL	2140 PRIEST BRIDGE CT STE 7 CROFTON, MD 21114-2499
33	JO-KELL INC	KRISTIN PARKINSON	5795 MINING TER JACKSONVILLE, FL 32257-3201
34	BRUCE'S ELECTRIC, INC	BARBARA WALKER	7447 BEATLINE RD LONG BEACH, MS 39560-8802
			2135 ROWLAND AVE

35	COLLINS CONSTRUCTION SERVICES, INC	DAWN MORGAN	SUITE C SAVANNAH, GA 31404-4422
36	KIPPER TOOL COMPANY	ELIZABETH GARRISH	2375 MURPHY BLVD GAINESVILLE, GA 30504-6001
37	CAN'T BE BEAT FENCE AND CONSTRUCTION, LLC	MEREDITH ANDERSON	2204 HIGHWAY 53 PERKINSTON, MS 39573-3910
38	A.M. COMMUNICATIONS SOLUTIONS, INC.	MARCY GRAMBO	1 N MAIN ST DOVER, PA 17315-1239
39	D&D CONSTRUCTION, INC.	DIANA WONG	94-1388 MOANIANI ST STE 222 WAIPAHU, HI 96797-6605
40	FIRST LOGISTEX, INC.	FAITH BLAIR	13795 JUDGE ORR RD PEYTON, CO 80831-8405
41	AIR CONTROL, INC.	SEAN CONNELL	80 14TH AVE N CLINTON, IA 52732-2928
42	DAVID C. SMITH & SON, INC.	CHRISTINA SMITH	3437 KEMPTOWN CHURCH RD MONROVIA, MD 21770-8707
43	DIVINE IMAGING INC.	KIMBERLY DEVANE	21323 PACIFIC COAST HWY STE 101 MALIBU, CA 90265-5202
44	RAND & JONES ENTERPRISES COMPANY, INC.	JOAN YANG	2950 NEILSON WAY UNIT 507 SANTA MONICA, CA 90405-5364
45	B&M CONSTRUCTION, INC.	BARBARA MYRICK	3134 BEACON ST COLORADO SPRINGS, CO 80907-5187
46	RAND & JONES ENTERPRISES CO INC	JOAN YANG	400 E 67TH ST APT 6D NEW YORK, NY 10065-6326
47	ADVANCED COMMUNICATION CABLING INC	RUTH FRITZ	35 BEACHVIEW LN FALLS OF ROUGH, KY 40119-7576
48	ADVANTAGE MECHANICAL-REFRIGERATION, INC.	JODI VAN HAREN	3836 RUSSELL ST STE 1 CEDAR SPRINGS, MI 49319-9821
49	MISSION ELECTRONICS INC	AARON ALT	11450 W 79TH ST OVERLAND PARK, KS 66214-1484
50	J'S ASSOCIATES, LLC	JUANITA KEEHN	10375 SOUTHERN MARYLAND BLVD STE 16B DUNKIRK, MD 20754-3059
51	ROOFING RESOURCES INC	JOSEPH CORDREY	423 MCFARLAN RD STE 100 KENNETT SQUARE, PA 19348-2487
52	GARUD TECHNOLOGY SERVICES, INC.	RAJIV SINGH	8815 CENTRE PARK DR STE 320 COLUMBIA, MD 21045-2284

53	HORIZON CONSTRUCTION GROUP, LLC	CROCKER WALLACE	2154 HILLSHIRE CIR MEMPHIS, TN 38133-6075
54	FLEX-LINE AUTOMATION, INC.	CATHY RINNE	3628 UNION SCHOOL RD CHESTER, IL 62233-3002
55	ARBILL INDUSTRIES INC	JOSH GOLDSTEIN	10450 DRUMMOND RD PHILADELPHIA, PA 19154-3806
56	MCCALL INDUSTRIAL SUPPLY CO LLC	STEPHANIE MCCALL	6372 W CONTRACTORS ST BOISE, ID 83709-4301
57	MCINTYRE BROTHERS LLC	BRANDY DECKARD	1020 7TH ST BEDFORD, IN 47421-2324
58	SILER EXCAVATING LLC	TAMMY SILER	1075 HILL ST JELLICO, TN 37762-2358
59	BARKLEY ANDROSS CORP.	JESSSICA ANDROSS	17415 CATALPA ST HESPERIA, CA 92345-5080
60	HUNEKE ASSOCIATES INC	NICOLE HUNEKE	706 W MAPLE AVE MERCHANTVILLE, NJ 08109-1822
61	PACE PACIFIC CORP	GLORIA LOWRIE	3731 E UNIVERSITY DR STE A PHOENIX, AZ 85034-7246
62	TITAN SPECIALIZED SERVICES INC	MANUEL PRIETO	4920 E 2550 N EDEN, UT 84310-7706
63	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992
64	SPIKA DESIGN & MANUFACTURING, INC.	KATHRYN SPIKA	254 COTTONWOOD CREEK RD LEWISTOWN, MT 59457-4936
65	JACK WAYTE CONSTRUCTION CO., INC	REGINA BABCOCK	7043 HIGHWAY 54 70 ALAMOGORDO, NM 88310-9138
66	APEX PINNACLE CORP	TAMMY TAYLOR	326 WATER ST BINGHAMTON, NY 13901-2618
67	PELICAN SALES INC	JOE GIANNACCO	2825 BUSINESS CENTER BLVD STE C9 MELBOURNE, FL 32940-7193
68	BCL LEASING LIMITED PARTNERSHIP	DANIELLE DETERDING	MILE 1225.5 AK HWY TOK, AK 99780-
69	ADVANCE MANAGEMENT, INC.	MONTY MCDOWELL	198 ADRIAN C SANCHEZ ST STE 3 TAMUNING, GU 96913-4456
70	SHORE COMMUNICATIONS, INC.	LAURA CASTNER	913 VENTURES WAY CHESAPEAKE, VA 23320-2857
71	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404
			3750 DURAZNO AVE

72	EL PASO J.A.G., INC.	ALEX CASTRO	EL PASO, TX 79905-1302
73	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST SAN DIEGO, CA 92121-1544
74	DOOR ADO EQUIPMENT SPECIALTIES, CORP.	JO ANN MEDINA	CALLE FERNANDEZ JUNCOS EDIFICIO PLAZA CENTRO CAROLINA, PR 00986-
75	ELEVATOR REPAIR SERVICE INC	JAY STAFFORD	4250 N SAM HOUSTON PKWY E STE 100 HOUSTON, TX 77032-3885
76	COMPUTER SITES INC	JOHN ANDERSON	1225 S HURON ST DENVER, CO 80223-3108
77	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
78	BSE PERFORMANCE, LLC	ROBIN SOBEY	22471 N 82ND AVE PEORIA, AZ 85383-2169
79	GEM MECHANICAL SERVICES INC	DREW SILICH	5101 BIRNEY HWY ASTON, PA 19014-1592
80	EVCO PARTNERS LP	EMILY MARKS	2701 PALMER HWY TEXAS CITY, TX 77590-6938
81	ASPHALT PLUS, INC.	MELINDA OEDEKOVEN	425 JOHNSON LN BILLINGS, MT 59101-6714
82	IAN CORPORATION	JIHYUNG CHONG	1129 ROUTE 15 BARRIGADA, GU 96913-
83	ALEXTON INCORPORATED	SOPHIA MARNELL	8210 CINDER BED RD STE 2 LORTON, VA 22079-1136
84	MGS CONSTRUCTION SERVICES INC	DIANE SANDERS	1500 ENTERPRISE DR STE 308 LEMOORE, CA 93245-9074
85	WRIGGLESWORTH ENTERPRISES INC	WENDY WRIGGLESWORTH	3516 S COLLEGE RD WILMINGTON, NC 28412-0912
86	TEJAS PREMIER BUILDING CONTRACTOR, INC	JULISSA CARIELO	1811 S LAREDO ST SAN ANTONIO, TX 78207-7019
87	DEVINE INSULATION INC	MARK DEVINE	11485 RICH HILL RD NORTH EAST, PA 16428-5814
88	WARNER SPECIALTY PRODUCTS, INC.	AMY NORTON	40 MONTOWESE AVE STE B NORTH HAVEN, CT 06473-3615
89	COMPETITIVE CHOICE, INC	AUNDREA YOUNG	9030 KIRBY DR HOUSTON, TX 77054-2504
			12015 TELEGRAPH RD

90	AIR FLO CLEANING SYSTEMS LLC	KALEEN MOZHAM	CARLETON, MI 48117-9761
91	POWERMASTER ELECTRIC INC	GINA FARTHING	311 JARCO DR FUQUAY VARINA, NC 27526-2901
92	GUARDIAN INDUSTRIAL SUPPLY, LLC	CHRISTINA DUNCAN	10629 METRIC BLVD AUSTIN, TX 78758-4520
93	BAIRCO CONSTRUCTION INC	STACY BAIR	1164 ROAD 7 LOVELL, WY 82431-9627
94	FEDERAL PROFESSIONAL SOLUTIONS, INC.	MARCY ANDERSON	820 CAMERON ST ALEXANDRIA, VA 22314-2410
95	KAU INC	KATHRYN WALDRON	4208 ROSEMONT LN FREDERICKSBURG, VA 22408-1962
96	MHK TECHNOLOGIES INC	SUSAN ROACH	225 VINE ST STE 1 JOHNSTOWN, PA 15901-1518
97	MRH SUPPLY, INC.	MARY ROSE HILDEN	26273 SW LABROUSSE RD SHERWOOD, OR 97140-8941
98	AULI`I CONSTRUCTION, INC.	MICHAEL CHUN	46-042 PUULAU PL KANEOHE, HI 96744-3542
99	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	401 HANOVER ST FREDERICKSBURG, VA 22401-5936
100	GAINESVILLE PLUMBING LLC	JANIS JONES	4258 BURROUGH DR STE 201 VINT HILL FARMS, VA 20187-4010
101	ONEILL CONTRACTORS INC	KANEY ONEILL	4307 REGENCY DR GLENVIEW, IL 60025-5209
102	GLOBE BUILDERS, INC.	ANGELINA RODRIGUEZ CHAVEZ	3009 PERSHING DR APT 1 EL PASO, TX 79903-2534
103	PUERTO RICO WATER MANAGEMENT INC	LUZ OTERO	216 CALLE DEL VALLE SAN JUAN, PR 00911-2328
104	ADSYNC TECHNOLOGIES, INC.	JANE ADKINSON	201 S F ST PENSACOLA, FL 32502-4527
105	ALLOY CRANE & MACHINERY LLC	KELLY MACMILLAN	1618 DEAN FOREST RD GARDEN CITY, GA 31408-9558
106	SECURITY WATCH INC	ARCHENA SHARMA	801 MYRTLE AVE STE 102 EL PASO, TX 79901-1599
107	M & R INSULATION SYSTEMS LLC	MARILYN DABRONZO DABRONZO	1790 YARDLEY LANGHORNE RD STE 107 YARDLEY, PA 19067-5530
108	BOSCO CONSTRUCTORS INC	ERIC ENRIQUEZ	34 PIN OAK DR DENVER, CO 80127-4327

109	CURRENT ELEVATOR TECHNOLOGY, INC.	TAMMY BOHLKE	129 MAPLE DR SHOHOLA, PA 18458-4112
110	DAWN INCORPORATED	DAWN OCHMAN	2861 SFERRA AVE NW WARREN, OH 44483-2273
111	IN AIR CONDITION, INC.	NELDYS ROSA NEGRON	BO. CEDRO ABAJO CARR. 811 KM. 2.0 NARANJITO, PR 00719-
112	ATWOOD HAY INCORPORATED	GLENDA HAY	321 ALTA VISTA AVE ROSEVILLE, CA 95678-1701
113	TRI COAST CONSTRUCTION, LLC	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
114	HYDRA ENGINEERING & CONSTRUCTION, LLC	LESLIE WEISS	36 JASPER THOMAS RD CRAWFORDVILLE, FL 32327-2324
115	ICD BUILDERS, INCORPORATED	CANDACE JOHNSON	202 12TH ST S APT 3 FARGO, ND 58103-1797
116	PANORAMA CONSULTING, INC.	SAMANTHA MCDANIEL	728 LAKE DR LAUREL HILL, FL 32567-3169
117	ZISKE-KRAFT WERKS INC	ANN MARIE ZISKE	92 COOPER AVE TONAWANDA, NY 14150-6650
118	ACORN SUPPLY AND DISTRIBUTING INC.	CATHERINE SCHULTZ	11167 PULASKI HWY WHITE MARSH, MD 21162-1819
119	EDGE SOLUTIONS LLC	ALICE REDDING	1523 ROYAL SPRINGS ST FAYETTEVILLE, NC 28312-9504
120	CECIL & CECIL ENTERPRISES INC	COREEN CECIL	3741 BUSINESS DR STE 100 SACRAMENTO, CA 95820-2178
121	ANNA LISA LUNA CONSTRUCTION, INC.	ANNA LUNA	1250 CRUZERO ST OJAI, CA 93023-3819
122	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
123	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
124	RAND & JONES ENTERPRISES CO, INC	JOAN YANG	18 TRACY ST STE A BUFFALO, NY 14201-2344
125	PROVEN MANAGEMENT LLC	DENITA CONWAY	1255 UNION ST NE STE 700 WASHINGTON, DC 20002-8494
126	KELLY CONSTRUCTION SERVICES INC.	KELLY FISHER	55 MAIN ST STE 5102A ENFIELD, CT 06082-3359
127	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839

128	FCN INC	ROBERT BROSEY	12501 ARDENNES AVE STE 101 ROCKVILLE, MD 20852-1741
129	CLAYTON CO CONSULTANTS LLC	ANNIE CLAYTON	2033 FLESHER AVE JACKSONVILLE, FL 32207-3519
130	MAGADIA CONSULTING INC	MAGDALENA GEBREKRISTOS	1734 ELTON RD STE 200 SILVER SPRING, MD 20903-5717
131	MV7 INC	JACQUELINE MATTIACCIO	8804 FIELDFLOWER LN TAMPA, FL 33635-6258
132	GALE CONSTRUCTION COMPANY OF ILLINOIS	LAURA PAGER	51 W JACKSON ST STE 230 JOLIET, IL 60432-1729
133	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
134	DIAMOND RIDGE DEVELOPMENT CORPORATION	JEFFREY GREEN	6098 N 57TH AVE GLENDALE, AZ 85301-7762
135	GUNTER CONSTRUCTION CO	CHRISTINA GUNTER	520 DIVISION ST KANSAS CITY, KS 66103-1904
136	B & B CRANE SERVICE LLC	MEGAN POWELL	5007 NORTHSIDE DR SHALLOTTE, NC 28470-4461
137	DEL RIO ENTERPRISES INC	KEVIN GARCIA	4201 ELLISON ST NE ALBUQUERQUE, NM 87109-4503
138	SOUTHWESTERN DAKOTAH INC	JESSYCA FOVARGUE	3148 S CHRYSLER AVE TUCSON, AZ 85713-5463
139	8-KOI INC	INGA YOUNG	2725 CENTER PLACE MELBOURNE, FL 32940-7106
140	GCJ INC	GINGER SEPULVEDA	3508 SHAMROCK WAY STE 101 TRACY, CA 95377-9204
141	OUTSIDE BOX LLC	CANDICE SOMERVILLE	1428 FLOYD AVE RICHMOND, VA 23220-4618
142	PAULA F PRICE ENTERPRISES LLC	PAULA PRICE	507 W MARTINTOWN RD NORTH AUGUSTA, SC 29841-3108
143	MACK GLOBAL LLC	ROBIN MACK	4121 MYLAN RD RICHMOND, VA 23223-2258
144	CITI APPROVED ENTERPRISE, LLC	INGRID THIBODEAUX	2439 MANHATTAN BLVD STE 5052 HARVEY, LA 70058-5328
145	FUTURE CONTROLS, INC	THOMAS HANSEN, JR.	5719 ZIP DR UNIT 1 FORT MYERS, FL 33905-5036
			70 INDUSTRIAL PARK DR STE 3E

146	DECORA INC	DENISE OGRADY	WALDORF, MD 20602-3739
147	HOSPITALITY LOGISTICS CONCEPT LLC	BASSEL SHUBASSI	9951 OAKTON TERRACE RD OAKTON, VA 22124-2939
148	KIRA CONSTRUCTION, INC	RALPH COX	1248 VIA VISTA FALLBROOK, CA 92028-3738
149	GREEN AND SUSTAINABLE SERVICES, LLC	CHARLOTTE SMITH	2421 AMYX RANCH DR PONDER, TX 76259-8032
150	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609
151	MASSILLON CONSTRUCTION AND SUPPLY LLC	THERESA CARR	1245 RAFF RD SW CANTON, OH 44710-1455
152	DYNAMIK, INC.	JESSE FELTEN	3990 OLD TOWN AVE, SUITE C107 SAN DIEGO, CA 92110-2968
153	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
154	D&S INTERNATIONAL, LLC	MARLENE CAMAN	5004 BRIGHTON AVE KANSAS CITY, MO 64130-3109
155	ECOSERVICES LLC	LINDA DENENNO	303B NATIONAL RD EXTON, PA 19341-2647
156	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST STE A SAN DIEGO, CA 92121-1544
157	INSULATION, LLC		
158	R&I CONSTRUCTION, INC.	IRENE WONG	98-1771 NAHELE ST AIEA, HI 96701-1724
159	OER SERVICES LLC	ALI ZAIMI	615 E APPLETREE LN ARLINGTON HEIGHTS, IL 60004-2607
160	D BURKE MECHANICAL CORP	JOANNE BRENTON	1925 TANDEM NORCO, CA 92860-3608
161	TOOTLE CONSTRUCTION, LLC	LINDA TOOTLE	1712 SUNWOOD DR LONGWOOD, FL 32779-2791
162	ADELAIDE SERVICES LLC	SELENA ALEMAN	118 BROADWAY ST STE 614 SAN ANTONIO, TX 78205-2007
163	EACM CORP	SOLANGIE ARROYO	20 MERIDIAN RD STE 1 EATONTOWN, NJ 07724-2270
164	TCB SERVICES, LLC	JAMES MCCLELLAN	11360 SE COUNTY ROAD 319 TRENTON, FL 32693-2672
165	CALSON CONSTRUCTION CORP	CAROLINE CALCAGNI	34 OAKDALE AVE JOHNSTON, RI 02919-5315
			150 OSIGIAN BLVD STE 400

166	F3 SOLUTIONS LLC	PARRISH SWEARINGEN	WARNER ROBINS, GA 31088-8969
167	US ECO PRODUCTS CORP	DOREEN BLADES	143 ESSEX ST STE 210 HAVERHILL, MA 01832-5553
168	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
169	COMP ENVIRONMENTAL, INC.	YANLING CAROLINE WANG	5615 RECKER HWY WINTER HAVEN, FL 33880-1267
170	SCHWARZ CONSTRUCTION LLC	KAREN SCHWARZ	9 SASSAFRASS LN FLORENCE, KY 41042-8849
171	BATIR ARCHITECTURE LTD	PAULA PRICE	1121 E MAIN STREET SAINT CHARLES, IL 60174-2205
172	AMALGAMATED SERVICES, INC.	KAREN RIFFICE	21024 S 80TH AVE FRANKFORT, IL 60423-9186
173	JCJ CHAVEZ CONSTRUCTION INC	MARILUPE CHAVEZ	115 S GOLD CANYON ST RIDGECREST, CA 93555-4121
174	M&K GENERAL CONTRACTORS INC	KARLA FRESE	1368 WOODEN VALLEY ST CHULA VISTA, CA 91913-2936
175	VANESSA ACIERTO	VANESSA ACIERTO	LOT 25-1 664 CHALAN PALE RAMON HAYA ROUTE 1 YIGO, GU 96929-2417
176	RK & G CONSTRUCTION INC	ROSA KINYON	1533 W BETTERAVIA RD SANTA MARIA, CA 93455-1027
177	THE GEMINI 3 GROUP, INC.	LINDA BLAKEMORE	50 TECH PKWY STE 107 STAFFORD, VA 22556-8615
178	ARGENT WORLD SERVICES LLC	LAURA MILLER	4701 FM 2920 RD SPRING, TX 77388-3160
179	ABHZEEN DESIGN INC	BHAVESH NAIK	34 SCHOOL RD E MARLBORO, NJ 07746-2056
180	GC GREEN, INCORPORATED	ELIZABETH PEREZ	102 SHELL DR SAN CLEMENTE, CA 92672-3652
181	SERVITECH, INC.	JIM BARKER	13892 E SMITH DR AURORA, CO 80011-2248
182	K WATSON GROUP LLC	KAREN WATSON	10834 OLD MILL RD STE 4 OMAHA, NE 68154-2648
183	GENECO TECHNOLOGIES, LLC	AMYE AMERINE	236 AIR BASE RD TYE, TX 79563-2322
184	BARTKOWSKI LIFE SAFETY CORP	LAUREN SUSTEK	140 W 168TH ST SOUTH HOLLAND, IL 60473-2839
	FOUR WINDS MECHANICAL HTC/AC		8915 ADAMS ST NE STE B

185	INC.	CHAULING ARMIJO	ALBUQUERQUE, NM 87113-2714
186	C. ORTIZ, CORP	CARMEN ORTIZ	4021 JOHNSON AVE EL PASO, TX 79930-6816
187	FIRELAKE CONSTRUCTION INC	JACKIE FOLEY	1011 E 31ST ST LAWRENCE, KS 66046-5103
188	BGESH INCORPORATED	WESTON HALLIBURTON	21943 DIAMOND CHASE STE 200 SAN ANTONIO, TX 78259-2743
189	ASHLAND INDUSTRIAL SERVICES, LLC	SHAWN CLASING	15842 ELM DR NEW FREEDOM, PA 17349-9400
190	GRANITE COMMERCIAL REAL ESTATE LLC	MEGAN PRIETO GIOKAS	30 TEMPLE ST STE 300 NASHUA, NH 03060-2412
191	BRENCO SUPPLY, INC.	KAREN LOYD	210 DAVIDSON DR STE B HOT SPRINGS NATIONAL PARK, AR 71901-9331
192	TSJ CONSTRUCTION, LLC	TREVOR ROWLEY	870 E 300 N CLEVELAND, UT 84518-
193	SITE MANAGEMENT ASSISTANCE LLC	KIMKO DOWELS	718 18TH ST MERIDIAN, MS 39301-3547
194	R & M GOVERNMENT SERVICES INC	RALPH ARCHETTI	650 MONTANA AVE STE A LAS CRUCES, NM 88001-4294
195	BECKRICH CONSTRUCTION, LLC.	JEFF RICHARDS	8855 WHISPERING PINE TRL COLORADO SPRINGS, CO 80908-3514
196	TL STINSON & ASSOCIATES LLC	TAMIKA CHURCHILL	6216 BENTGRASS PL LOCUST GROVE, GA 30248-7064
197	SHELVING AND FILING CONCEPTS, LLC	WANDA RACHAL	405 SAINT CLAIR RD BOYCE, LA 71409-9022
198	ACCENTZ, INC.	FARHA KHAN	6695 S QUEMOY CIR AURORA, CO 80016-2686
199	SUNAGO SUPPLY CORPORATION	ETTA TUCKER	2914 VILLA LAKE DR POWDER SPRINGS, GA 30127-5049
200	CM CONSTRUCTION SERVICES, INC.	MONIQUE MIRON	8300 W DOE AVE VISALIA, CA 93291-9261
201	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	2026 S CALLAGHAN RD SAN ANTONIO, TX 78227-2265
202	THE PLUMBING SHOP, INC	PERIDOT DAVIS	1121 FLAMINGO DR AUSTELL, GA 30168-6109
			75 S MAIN ST

203	CINTEOT INC.	CHRISTINA HUNT	CHAMBERSBURG, PA 17201-2224
204	CHAD PODY CONSTRUCTION COMPANY, L.L.C.	ANGELA PODY	275 GOODGOIN RD RUSTON, LA 71270-8730
205	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
206	KLUZ INTERNATIONAL CORPORATION	INES KLUZ	220 N TUSTIN AVE SANTA ANA, CA 92705-3807
207	PROSPERITUS SOLUTIONS LLC	KRYSTAL NERIO	1014 PEABODY AVE SAN ANTONIO, TX 78211-2844
208	ASPIRYON LLC	NEIL CRISMAN	7600 CHEVY CHASE DR SUITE 300 AUSTIN, TX 78752-1599
209	MINATOISHI PALUMBO ARCHITECTS, INC.	LORRAINE MINATOISHI	1003 BISHOP ST STE 1975 HONOLULU, HI 96813-6461
210	ALZA ELECTRICAL CORP	ANTONIO BARRON	13700 GUERRERO DR EL PASO, TX 79928-5642
211	EXECUTIVES LLC	YURI BLANCO	46 EAGLE RIVER ST STE 130 EAGLE, ID 83616-6593
212	IDEAL SYSTEM SOLUTIONS, INC.	SHELIA HERSHEY	12 ROCKY SLOPE DR SANTA FE, NM 87508-1353
213	EAST COAST TECHNOLOGIES, LLC	SCOTT ANDERSON	303 W MADISON ST BALTIMORE, MD 21201-4614
214	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
215	CIN-G CONTRACTING LLC	CINDY GONZALES	5285 W LOUISIANA AVE LAKEWOOD, CO 80232-5938
216	MDM MAC ENTERPRISES INC	DENISE MCINTYRE	319 ELMHURST DR WAXHAW, NC 28173-6058
217	SUGAR SHORES CONSTRUCTION LLC	TAMESHA EVERS	14 LIVE OAK ST STE A7 GULF BREEZE, FL 32561-4484
218	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
219	LOSHAW THERMAL TECHNOLOGY LLC	MARCI BITTNER	59 N MAIN ST SPRING GROVE, PA 17362-1013
220	HORIZON SOLUTION COMPANY	JESSICA DERENBERGER	311 ADAMS ST RAEFORD, NC 28376-2701
221	HD INC.	JANET HURLEY	6391 AVIATION CIR LOVELAND, CO 80538-9000
	PREMIER MECHANICAL PRODUCTS		6601 KANSAS AVE

222	LLC	ASHLEY TUMBERGER	KANSAS CITY, KS 66111-2314
223	THE HAND TRUCK COMPANY, LLC	JUDITH KOCHEVAR	1221 BERWIND AVE PUEBLO, CO 81006-1001
224	CHIPPEWA STONE LLC	BONNIE GRAVES	3 RYDER RD WHITEHALL, NY 12887-1805
225	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
226	MSAB, LLC	LAURA KNIGHT	400 PERRY PKWY PERRY, GA 31069-9246
227	DARBONNIER TACTICAL SUPPLY LLC	BRITTNI DARBONNIER	951 NE 21ST CT OAK HARBOR, WA 98277-2715
228	SAWYER SERVICES INC	KIM SAWYER	56851 GRATIOT AVE CHESTERFIELD, MI 48051-1308
229	RELIANT ELEVATOR INSPECTIONS & CONSULTING, INC.	SHARYN FRICKE	5020 RUNNING BROOK DR JOSHUA, TX 76058-5760
230	BEST VALUE MANAGEMENT, LLC	BRENDA CAMPBELL	1225 W BEAVER ST STE 12306 JACKSONVILLE, FL 32204-1414
231	LEDAMARK INC	PHYLLIS STEPHENS	977 LOWER HATCHER CREEK RD STANTON, KY 40380-9765
232	ARMITAGE ARCHITECTURE INC.	PENNY ARMITAGE	6512 MAIN ST WILLIAMSVILLE, NY 14221-5836
233	TVS DISTRIBUTORS INC	VERA SAPP	2822 E OLYMPIC BLVD LOS ANGELES, CA 90023-3412
234	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
235	ARCH SYSTEMS LLC	VINI EHSAN	1800 WASHINGTON BLVD STE 421 BALTIMORE, MD 21230-1735
236	SONCOAST PROCUREMENT, LLC	RACHANA IYENGAR	1716 KELLEY AVE KISSIMMEE, FL 34744-3300
237	COMP ENVIRONMENTAL INC	CAROLINE WANG	4701 SANGAMORE RD STE N100 BETHESDA, MD 20816-2558
238	DREAM DESIGN & CONSTRUCTION, INC	LEANN WILKES	1101 IDLEWILD AVE GREEN COVE SPRINGS, FL 32043-3903
239	PAULSON PLUMBING & MECHANICAL, LLC	PAULETTE BACA	1211 4TH ST SW ALBUQUERQUE, NM 87102-4368
240	CB CONSTRUCTION SERVICES, INC	DENISE BARKER	275 BIG ROCK DR DOVER, PA 17315-2132
			3542 N UTAH ST

241	BLOOMSBURIE LLC	KINHA LESTER	ARLINGTON, VA 22207-4444
242	B & H INTERNATIONAL LLC	TASNEEM KATABJI	10303 ASCOT CROSSING ST BAKERSFIELD, CA 93311-4961
243	CUSTOM IT SERVICES LLC	CHERYL SCHEUERMAN	957 VIA VANNUCCI WAY HENDERSON, NV 89011-0106
244	VANGUARD PACIFIC LLC	SYDNEY CODY	14051 COUNTY ROAD 9 FOLEY, AL 36535-8318
245	SUNWEST ENGINEERING CONSTRUCTORS, INC	MICAELA KISSICK	4780 CHEYENNE WAY CHINO, CA 91710-5531
246	ADAPT CONSULTING LLC	LISA LOWERY	598 REDWOOD RD SARATOGA SPRINGS, UT 84045-9603
247	JIM JAM, INC.	JAMES GALLET	11003 W 59TH TER SHAWNEE, KS 66203-2956
248	GRENLAR HOLDINGS, INC	KALEN GRENZEBACH	16636 SIMONDS RD NE KENMORE, WA 98028-4413
249	MIA GENERAL CONTRACTING LLC	BRANDY DODD	4221A HIGHWAY 90 MILTON, FL 32571-2011
250	MX CONSTRUCTION, INC.	TIFFANY AMEZCUA	720 S FRONTAGE RD STE 106 NIPOMO, CA 93444-5626
251	SH MECHANICAL INC.	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
252	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	404 HAUPT SQ SE LEESBURG, VA 20175-2722
253	DARI CONCEPTS LLC	ANGELA KILIC-CAVE	8623 DIXIE PL MCLEAN, VA 22102-1537
254	ROCK SOLID SOLUTIONS, LLC	ROLANDA AMOS	2124 CLIFF DR NASHVILLE, TN 37218-2814
255	WITHIN INTERIOR DESIGN, INC.	Heather Robinson	205 N WATER ST ELIZABETH CITY, NC 27909-4417
256	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	504 CAPITAL CIR SE STE A TALLAHASSEE, FL 32301-3807
257	WILCOX & DYER, LLC	KEITH WILCOX	9412 TASKER RD LAKE ODESSA, MI 48849-9741
258	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
259	ADDON SERVICES LLC	PRITA ABRAHAM	300 MEMORIAL FIELD DR HOPKINSVILLE, KY 42240-8075
260	EASTERN POWER TECHNOLOGIES INC	ROD TURNAGE	215 PELHAM DAVIS CIR GREENVILLE, SC 29615-5753

261	Z SQUARED BUILDERS INC.	LOURDES MALAEKEH	5039 ROBERT J MATHEWS PKWY # 400 EL DORADO HILLS, CA 95762-5752
262	TITAN ASSOCIATES GROUP INC.	TANYA LEONARD	1891 INGLESIDE AVE ATHENS, TN 37303-2193
263	GWO, INC.	MIRION GREEN	832 CAMBRIDGE AVE MATTESON, IL 60443-1855
264	TERA CONSULTING INC.	KHURRAM BAJWA	29 ELVES LN LEVITTOWN, NY 11756-5522
265	DOFINE SPRINKLER REBUILDERS INC	DALLES DUFFIN	218 W 13TH ST BURLEY, ID 83318-1602
266	LD SUPPLY, LLC	LISA D'ALESSIO	925 HALE PL STE A6 CHULA VISTA, CA 91914-3507
267	EMC, LLC	JOAN HICKS	205 SCOTT AVE GLEN BURNIE, MD 21060-7759
268	RIVETER ENTERPRISES	CARLA STEPHANY	919 W CUCHARRAS ST STE 130 COLORADO SPRINGS, CO 80905-1646
269	NRK CONSTRUCTION, LLC	NORISHA GLOVER	700 N 10TH ST STE 200 BATON ROUGE, LA 70802-4508
270	EMPOWER CONTRACTING INC.	YOLANDA VALDES	1361 BROOKLYN BLVD BAY SHORE, NY 11706-4008
271	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
272	GLOBAL QUALITY SOLUTIONS, INC.	ADRIANA BLANKENSHIP	7235 BENTLEY RD STE 930 JACKSONVILLE, FL 32256-7565
273	OUTSIDE THE BOX LLC	CANDICE SOMERVILLE	433 EXETER DR BIRMINGHAM, AL 35206-2845
274	NISOU ENTERPRISES INC	NIHARIKA SHASTRI	37279 ASPEN DR FARMINGTON HILLS, MI 48335-5479
275	GULF COAST SOLUTIONS LLC	YVETTE BREAZEALE	12300 BIG CREEK RD GULFPORT, MS 39503-7306
276	MASHIMA ELECTRIC LLC	KATHRYN MASHIMA	91-1012 IPOLANI ST APT A KAPOLEI, HI 96707-3062
277	BUSYWOMAN, LLC		
278	COX-MORGAN & ASSOCIATES, LLC	DONETH MORGAN	6015 CHESTER CIR STE 202 JACKSONVILLE, FL 32217-2273
279	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
			17406 E 425 RD

280	NATIVE STAR GROUP, INC	JOSH PETERSON	JAY, OK 74346-3735
281	JNV GROUP	VADIM JOHNSON	5018 SIENNA LN SACRAMENTO, CA 95835-2058
282	MAKRO CORP.	LAURA GONZALEZ	1761 CARR 8838 SAN JUAN, PR 00926-2741
283	NV SERVICES LLC	NEYSSA VARELA	URB. LAS LOMAS BLOQUE U3 #3 SAN JUAN, PR 00921-
284	DUCO, LLC	MJ DUBOIS	8238 INGLETON CIR EASTON, MD 21601-5044
285	WOODSTOCK CONSTRUCTION GROUP LTD.	LISA MONJARDO	41 LUDLAM AVE BAYVILLE, NY 11709-3203
286	COMP ENVIRONMENTAL INC	YANLING CAROLINE WANG	6731 WHITTIER AVE STE B-230 MC LEAN, VA 22101-4525
287	MYNATT BUSINESS SERVICES LLC	CASSANDRA MYNATT	5019 CURTIS DR BIRMINGHAM, AL 35215-4049
288	ALEXANDER PACIFIC INC.	LAURIE WARD	91-1210 KAIKOHOLA ST EWA BEACH, HI 96706-6231
289	RNN ARCHITECTS, INC	REBECA ARISTIZABAL	2930 S WOLFF ST DENVER, CO 80236-2013
290	NATIVE INDUSTRIES LLC	MONIQUE JOHNSON	1349 BAYVILLE COURT APT 5 NORFOLK, VA 23503-1057
291	CONTRACTING & COMMUNICATIONS SERVICES, INC.	GINA TYSHING	107 ENGLEFIELD DR GAITHERSBURG, MD 20878-2661
292	AVCOR CONSTRUCTION, LLC	AMANDA POWERS	10684 HIGHWAY 319 AUSTIN, AR 72007-9485
293	STEELMAN BUILD & CONSTRUCTION INC	AISHA THOMPSON	523 N INDIAN HILL BLVD CLAREMONT, CA 91711-4347
294	POWER INNOVATIONS INC	KIMBERLY KELLY	2725 WALNUT ST MCKEESPORT, PA 15132-7066
295	BUCKET PRO LLC	CHEYENNE BROOKS	1898 BUFFALO ST OLEAN, NY 14760-1142
296	QUEST POWER INTERNATIONAL, LLC	PATRICIA ARAUZ-CORROW	36 W PINE ST STE 202C ORLANDO, FL 32801-2612
297	BLUE CONSTRUCTION SERVICES LLC	SEPTEMBER BLUE	633 YORK LN SE LEESBURG, VA 20175-4017
298	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
			6397 PINE RD

299	LEGACY PRODUCT SUPPORT LLC.	JACKIE PULEO	THOMASVILLE, PA 17364-9578
300	ALL MOBILITY PUERTO RICO INC	MAIRYM HERNANDEZ RIVERA	CARR 838 KM 1 HM 8 INT SECTOR MELIA LEON GUAYNABO, PR 00969-
301	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	615 BARONNE ST STE 205 NEW ORLEANS, LA 70113-1016
302	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	4203 WOODCOCK DR STE 265 SAN ANTONIO, TX 78228-1312
303	INTEGRATED GLOBAL STAFFING, LLC	JESSICA HOLLOWAY	602 N COLORADO ST STE 110 KENNEWICK, WA 99336-7825
304	JACKSON SOLUTIONS, LLC	KAREN DONAHUE	587 PIAZZA PT OVIEDO, FL 32765-5411
305	CINKA CONSTRUCTION & CONSULTING SERVICES LLC	CYNTHIA MARTIN	307 SAINT KITTS LOOP SAINT AUGUSTINE, FL 32092-1181
306	CPS SOLUTIONS LLC	TERI STACH	1398 LONG MDW SALADO, TX 76571-6000
307	MCG CONTRACTS LLC	VELMA SIMMONS	4031 NW BETHEL RD BRISTOL, FL 32321-2206
308	KERNS CONSTRUCTION, LLC	ASHLEI KERNS	5366 W PECAN RD LAVEEN, AZ 85339-2456
309	M PATTERSON SERVICES LLC	MICHELE PATTERSON	3001 READING AVE HAMMONTON, NJ 08037-8002
310	EVANS INDUSTRIAL CONSTRUCTION, LLC	PATRICIA EVANS	2775 SOUTHGATE DR SUMTER, SC 29154-8099
311	MGS CONSTRUCTION SERVICES INC.	DIANE SANDERS	310 E TAYLOR DR SALLISAW, OK 74955-1927
312	VANGUARD PACIFIC LLC	SYDNEY CODY	2207 GARNET AVE STE N SAN DIEGO, CA 92109-3713
313	ILLUSTRIOUS CONSULTANTS, LLC	KAHLIA MEEKS	2106 RENAISSANCE WAY NE ATLANTA, GA 30308-2461
314	DIAMOND CAPTURE ASSOCIATES LLC	BARBARA RIVERA	8192 LOST CREEK LN DELRAY BEACH, FL 33446-0022
315	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
316	POSHNFIT LLC	TYANIEKA JACKSON	17910 VAN DYKE ST STE 1073 DETROIT, MI 48234-3954
317	GOVPARTS LLC	CHAD ROSS	1810 S ANTHONY BLVD FORT WAYNE, IN 46803-3606
			2 LAWSON AVE

318	CEDAR PARK GROUP INC	SAMANTHA TERLINE	UNIT 11 EAST ROCKAWAY, NY 11518-1700
319	DUMOUR SERVICES LLC	JACQUELINE PERKINS	201 CRATER WOODS CT PETERSBURG, VA 23805-9100
320	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
321	INDUSTRIAL STRENGTH INDUSTRIES LLC	ARA BASMAJIAN	732 SOUND VIEW RD OYSTER BAY, NY 11771-1114
322	GIACORP CONTRACTING INC	LISA WALTER CALICCHIA	11 BRADHURST AVE HAWTHORNE, NY 10532-2135
323	RK STRATEGIC MANAGEMENT SOLUTIONS LLC	JENNIFER HEINZ	3911 IH 10 E #HM SAN ANTONIO, TX 78219-4002
324	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
325	ELEVATED ENTRANCES INC	BRANDY DIETZ	2155 VICTOR PL COLORADO SPRINGS, CO 80915-1506
326	IRON AUTOMATION & FABRICATION LLC	MIRANDA JONES	2527 S 215TH DR BUCKEYE, AZ 85326-5932
327	PED CONCEPTS INC.	KELLEY PITTMAN	10752 DEERWOOD PARK BLVD SOUTH WATERVIEW II STE 100 JACKSONVILLE, FL 32246-
328	BRAVE ONE CONTRACT AGENCY, LLC	RAFFA GIBBARD	402 S FULTON ST SALISBURY, NC 28144-4832
329	WTA CONTRACTORS LLC	TAMERA PREACHER	607 CHEROKEE DR NORTH AUGUSTA, SC 29841-4785
330	US TRAINING CONSULTANTS LLC	JENNIFER SCHMOYER	19 MYRTLE RD HONESDALE, PA 18431-2430
331	CAPITAL SERVICES LLC	VERONICA NIEVES	8TH STREET SECTOR BECHARA LOTE D SAN JUAN, PR 00920
332	D 3 CONSTRUCTION SERVICES, INC.	CLAUDIA THOMPSON	7002 VIA MARIPOSA SUR BONSALL, CA 92003-5621
333	GLOBAL REGISTRATIONS LLC	VERA CHAWLA	10423 WILLOWBROOK DR POTOMAC, MD 20854-4477
334	BROOKES CONSTRUCTION LLC	CHISA BROOKES	3202 WILKINSON BLVD #667492 CHARLOTTE, NC 28208-5659
335	STILES GENERAL CONTRACTORS LLC	ADELIZ STILES	6505 ANGORA LOOP ST S EL PASO, TX 79934-
	COPELAND CONTRACTING		1425 UNIVERSAL CITY BLVD BLDG 3

336	COMPANY INC	ELSA NIEVES BROWN	SAN ANTONIO, TX 78148-3364
337	RENO/TAHOE REALTY GROUP LLC	SARAH CARMONA ZINK	232 ANACAPA ST STE 2C SANTA BARBARA, CA 93101-1841
338	L.J.V. DEVELOPMENT, LLC	LISETH VELEZ	50 MILK ST FL 16 BOSTON, MA 02109-5002
339	EAGLE FEDERAL CONSTRUCTION LLC	SHEENA JONES	600 ELDREDGE AVE CAPE MAY, NJ 08204-
340	AUTOMATIC DOOR SOLUTIONS LLC	EMILY / ANDREW BUMAN	19602 153RD AVE E ORTING, WA 98360-9496
341	SPEARS CONSTRUCTION GROUP INC	KAREN SPEARS	7688 SW JACK JAMES DR STUART, FL 34997-7239
342	H. A. FERNOT CO., INC.	RANDY MITCHELL	32 KULICK RD FAIRFIELD, NJ 07004-3308
343	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	111 N ORANGE AVE STE 1020 ORLANDO, FL 32801-2399
344	DEBORA SMITH ENERGY PARTNERS INC	JOHN BACHOLZKY	4455 MAIN ST BROWN CITY, MI 48416-9701
345	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
346	NIKKI'S ETC. L.L.C.	NAKIA JONES	3501 HOLIDAY DR STE 311 NEW ORLEANS, LA 70114-8283
347	NOVA BUILDING SOLUTIONS LLC	NADINE VILLANUEVA	27103 E ONTARIO PL AURORA, CO 80016-7514
348	ADAPT CONSULTING LLC	LISA LOWERY	17645 E OLD CHERRY RD DEWEY, AZ 86327-7315
349	ZBS & ASSOCIATES LLC	TANISHA JEWELL	510 PLAZA DRIVE STE 1245 ATLANTA, GA 30349-7239
350	ADDON SERVICES LLC	PRITA ABRAHAM	1800 DIAGONAL RD STE 600 ALEXANDRIA, VA 22314-2840
351	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
352	2LYONS AEROSPACE LLC	MIKE CANTAVE	3329 NW 55TH ST FORT LAUDERDALE, FL 33309-6306
353	WILLIAMSVILLE RESOURCES II, INC.	NATHANIEL PETTIFORD	17711 E STRACK DRIVE #100 SPRING, TX 77379-5215
	ENGINEERING SYSTEMS AND		11438 CRONRIDGE DR STE O

354	PRODUCTS LLC	JANINE MERTZ	OWINGS MILLS, MD 21117-2225
355	GREYSTONE SERVICES LLC	FAIZAH SAYED	6195 LEWIS AVE TOLEDO, OH 43612-4341
356	GLOBAL QUALITY SOLUTIONS, INC.	Adriana Blankenship	4525 S SANDHILL RD STE 103 LAS VEGAS, NV 89121-5955
357	TVRDY 8 LLC	KELLY TVRDY BENES	6221 S 90TH ST STE A OMAHA, NE 68127-4054
358	AXC INNOVATIONS INC	ANH THU DOAN	1312 E GUAVA AVE LOMPOC, CA 93436-6213
359	PISB GROUP LLC	JENNIFER COOK	121 CROWDERS CREEK RD GASTONIA, NC 28052-9787
360	E.K. MANAGEMENT, L.L.C.	EDNA KEEFE	909 EMILY CIR FORT WALTON BEACH, FL 32547-1980
361	CARRASCO PROJECT MANAGEMENT CPM- LLC	SANDRA CARRASCO	6433 VUELTA VENTURA SANTA FE, NM 87507-7127
362	ALTERNATIVE COATINGS SOLUTIONS, INC.	ANGELICA IBARRA	30032 CIELO MESA TEMECULA, CA 92592-5105
363	AANTILIA LLC	PRIYAL AGRAWAL	701 TILLERY ST STE 12 AUSTIN, TX 78702-3751
364	HD INC	JANET HURLEY	3116 E LYNDALE AVE HELENA, MT 59601-6445
365	ON THE GO MEDICAL SUPPLY LLC	NICOLE WILSON	2626 S LOOP W STE 238 HOUSTON, TX 77054-5643
366	M.K. MOORE & SONS, INC	ANTHONY MOORE	5150 WAGNER FORD RD DAYTON, OH 45414-3662
367	VANGUARD PACIFIC LLC	SYDNEY CODY	119 W GARDEN ST PENSACOLA, FL 32502-5617
368	NORTHERN STONE CARVING LLC	MARGARET MOORE	211 SAINT ANTHONY PKWY STE B9 MINNEAPOLIS, MN 55418-4862
369	TLI CONSTRUCTION, INC.	CINDY LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
370	SAPPHIRE HYDRAULICS INC	SARAH SAPIR	227 HIGHWAY 90A W ROSENBERG, TX 77471-8838
371	SILVER-SMITH DEVELOPMENT, LLC	PAMELA JONES-SMITH	1196 CAPITAL CIR NE STE A TALLAHASSEE, FL 32301-3531
372	TECHNION CONTRACTORS TCI, INC.	FRAN AMKRAUT	7618 JELLICO AVE NORTHRIDGE, CA 91325-4509
	ACCESS COMMUNICATIONS		5470 S MONROVIA AVE

373	GROUP LLC	ANA ESPINOZA ENRIQUEZ	TUCSON, AZ 85706-2120
374	SCHUBERT DIANA	DIANA SCHUBERT	3255 DESERT SAGE DR LAKE HAVASU CITY, AZ 86404-2768
375	AVANTE CONSTRUCTION INC	YOKO LARKIN	9380 ACTIVITY RD STE J SAN DIEGO, CA 92126-4413
376	CFS MEDICAL SUPPLIES AND EQUIPMENT, INC	TARA SLAUGHTER	2114 REDONDO BEACH BLVD TORRANCE, CA 90504-1616
377	FILLMORE CONTRACTS, LLC	KIMBERLY KIDD	2330 SCENIC HWY S STE 203 SNELLVILLE, GA 30078-3115
378	MJAG CONSTRUCTION SERVICES, LLC	FELICIA WHITE	10019 S 10TH ST BELLEVUE, NE 68123-4014
379	WINFIELD, LLC	KELLY REEVES	132 INDUSTRIAL BLVD HOUMA, LA 70363-6800
380	MERIT MECHANICAL CO	COURTNEY PLUNKETT	17813 EDISON AVE STE 102 CHESTERFIELD, MO 63005-1252
381	COMMERCIAL CONTRACTORS LLC	AMY TAMANAHA	151 ROSE ST APT A WAHIAWA, HI 96786-2365
382	PATTERSON PRECISION MANUFACTURING INC	LESLIE PATTERSON	1188 E BROADWAY AVE NORTON SHORES, MI 49444-2356
383	PRODIGY CONTRACTING, LLC		
384	ALPHAVETS, INC	CYNTHIA SPRAGG	15 LIBERTY ST E STE A YORK, SC 29745-1546
385	FRANKIE SOFIA LLC	RITA DELUCCIA	3195 VALHALLA DR BRONX, NY 10465-1343
386	DONNATHEPILOT, LLC	DONNA ENGELBRECHT	6 FAIRWAY RD JACKSONVILLE BEACH, FL 32250-2635
387	LABOR SERVICE MANAGEMENT CO	LAURA SCOTT	20 MINE BROOK RD COLTS NECK, NJ 07722-1749
388	BUSINESS PREP, LLC	MONIQUE MUNRO	5159 POOKS HILL RD APT 1410 BETHESDA, MD 20814-5605
389	LALINI ENTERPRISES LLC	LALINI PILLAY	1400 MONTAGUE ST NW WASHINGTON, DC 20011-2870
390	SKO ENTERPRISES INC	STEPHANIE TAYLOR	1485 S DOG EAR DR COALVILLE, UT 84017-5555
391	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431

392	SOUTHERNBELLE ROOM, LLC	JAMILLA CURTIS	2001 MARTIN LUTHER KING JR DR SW STE 430B ATLANTA, GA 30310-5806
393	KAY/LIN ASSOCIATES, LLC		
394	BLUE, ELAINE	ELAINE BLUE	1545 QUADRILLE CT RIVERSIDE, CA 92503-7221
395	ALLIE BRIDGE ENERGY SOLUTIONS	REBECCA WETZSTEIN	1343 N GRAND AVE STE 210 COVINA, CA 91724-4043
396	TRUEDGE SOLUTIONS, LLC	SUNG CHOI	744 CALABRIA LANE AMBLER, PA 19002-1539
397	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
398	HONEST ELEVATOR LLC	MARY CRAMER	11407 SWEET HALL WAY MECHANICSVILLE, VA 23116-4907
399	FMS PROVIDER LLC	LAURA SAPIR	2276 SW 183RD TER MIRAMAR, FL 33029-5253
400	JMC HOMES & GENERAL CONTRACTING, LLC	RHONDA CAGLE	390 RACETRACK RD MCDONOUGH, GA 30252-1022
401	OSPREY ADVANTAGE SOLUTIONS LLC	MARIA CARO	133 RIVER RUN QUEENSTOWN, MD 21658-1642
402	PARKER CONSTRUCTION ENTERPRISES INC	JULIETTE PARKER	5284 GOLD TREE CT ORLANDO, FL 32808-1772
403	MAUKA CONTRACTING LLC	AMBER STRONG	3084 POIPU RD KOLOA, HI 96756-9573
404	BOYD AND WEEKS LLC	SUBRENA TUMBLIN	21223 BAILEYWOOD DRIVE RICHMOND, TX 77407-1015
405	DIAMOND MANAGEMENT LLC	RICHARD BLECHER	4 EVANS CIR POQUOSON, VA 23662-1606
406	FREEDOM FLEUR LLC	KIRSTIE HORTON	1033 DEMONBREUN ST STE 300 NASHVILLE, TN 37203-4512
407	LOPEZ-GUERRA CONSTRUCTION LLC	CAMILA RICH	8400 OSUNA RD NE STE 3A ALBUQUERQUE, NM 87111-2070
408	AJB CONSTRUCTION INC	DAN CARROLL	26077 NELSON WAY STE 1306 KATY, TX 77494-6699
409	WAVCOMM	PENNY RYAN	1429 S CUCAMONGA AVE ONTARIO, CA 91761-4510
			124 KAULANA WAY

410	ADDON SERVICES LLC	PRITA ABRAHAM	HONOLULU, HI 96821-2531
411	MARIE, LLC	WILL HEWITT	12744 KINGSTON PIKE, SUITE 201 KNOXVILLE, TN 37934-0942
412	WESTERN SUPPLIES INC	MARY ELLIS	1090 RIFLE RANGE RD IOWA PARK, TX 76367-7008
413	DANU LLC	KATHLEEN MCCAULEY	536 MANOR CIR FOLSOM, PA 19033-3121
414	BGM HOMES LLC	JASMINE THORNTON	2801 LOIS LANE ROWLETT, TX 75088-4955
415	FREEDOM CONSTRUCTION AND CONSULTING INC.	BRENDAN TULLY	1015 GODFREY AVE SW GRAND RAPIDS, MI 49503-5005
416	TLI CONSTRUCTION, INC.	CYNTHIA LINCICOME	7900 EAST UNION AVENUE SUITE 1100 DENVER, CO 80237-2746
417	LSHADDAI CONSULTING LLC	CHIQUITA SPEARS	5404 RUE NICOLE BAKER, LA 70714-8017
418	SOLAR STEP LLC	LOURDES MARCANO	REPARTO TERESITA U-10 CALLE 20 BAYAMON, PR 00961-8352
419	BEINDUSTRIAL LLC	LISANDRA BERRIOS	URB LAS RAMBLAS 33 CALLE MIRO GUAYNABO, PR 00969-1022
420	TEFERA INVESTMENT GROUP LLC	ROSEMARY TEFERA	125 SW CAMPUS DR APT 1106 FEDERAL WAY, WA 98023-8313
421	RED HILLS PARTNERS LLC	MELISSA OGLESBY	7805 BRIARCREEK RD N TALLAHASSEE, FL 32312-3661
422	ALL AMERICAN FEDERAL CONSTRUCTION LLC	MONIQUE EADDY	27202 STONE HARBOUR LN KATY, TX 77494-3691
423	CHRISTINA'S CONSTRUCTION SERVICES, LLC	CHRISTINA MASCHIETTO	3805 6TH ST BROOKLYN, MD 21225-2103
424	IKWEBAY LLC	KHARA LADUCER	814 CHIEF LITTLE SHELL ST BELCOURT, ND 58316-
425	G.M. HILL ENGINEERING, INC.	GINA HILL	283 CONSTITUTION DR SUITE 903 VIRGINIA BEACH, VA 23462-6722
426	JO-KELL INC	JOHN KELLY	6255 PRESCOTT CT CHINO, CA 91710-7112
427	MELANIE HARRIS	MELANIE HARRIS	1147 PICKETS RIDGE DR LOCUST GROVE, GA 30248-2847

428	LLC		
429	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
430	SAGA CONSTRUCTION LLC	DEANN HOWELL	3811 HIGHWAY 431 HEFLIN, AL 36264-3135
431	YERKES SOUTH INC	CHRISTINE YERKES	5605 N MACARTHUR BLVD STE 1066 IRVING, TX 75038-2617
432	YOUR AUTOMATIC DOOR COMPANY	NANCY LASITER	3379 S MAUXFERRY RD FRANKLIN, IN 46131-8149
433	A TASTE OF NEW ORLEANS CATERING LLC	JACQUELINE ERNST	1211 SUNDROP DR MANSFIELD, TX 76063-1687
434	DUNNS LOGISTICS INC	STACY DUNN	10614 SENTINEL DRIVE SAN ANTONIO, TX 78217-3812
435	C.M. PRODUCTS LLC	JOYLYNN WAGANER	4124 EHLMANN RD SAINT PETERS, MO 63376-6456
436	DODD ENTERPRISES INTERNATIONAL LLC	KANDICE DODD	6412 OYSTER ISLAND CV APOLLO BEACH, FL 33572-2507
437	SHEYENE TECHNOLOGY INC	SHEYENE GERARDI	276 5TH AVE RM 704 NEW YORK, NY 10001-4527
438	TBS LLC	YELIZ LAUREANO	1479 ASHFORD AVE. CONDADO DEL MAR A 18 SAN JUAN, PR 00907-1583
439	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
440	VIRTUAL ACCOUNTING GROUP INC	FABIENNE GLEMAUD	5907 HEAVENWOOD DR SE MABLETON, GA 30126-3689
441	SUCCESS DS, INC.	DANIELA SUCCURRO	8302 NW 68TH ST MIAMI, FL 33166-2655
442	CREE8IVE WHOLESALE INTL LLC	LUCRESIA DOOMES	4916 CHEROKEE WAY SE CONYERS, GA 30094-4536
443	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
444	THE TRANSPORT COMPANY CORP	AMRITA ALI	8268 KILMER CIR SACRAMENTO, CA 95828-5604
445	NEW ERA DEVELOPMENT GROUP LLC	GRACEANN PALMISANO	68 35TH ST # C559 BROOKLYN, NY 11232-2019
			752 CHAMBERS ST

446	FM CIBORT LLC	FRANK CIBORT	HARRISBURG, PA 17113-1705
447	CITIZEN CONTRACTING GROUP LLC	JAMIE WINBURY	12607 E 60TH ST STE C TULSA, OK 74146-6929
448	CIERRA GROUP INC.	JENNIFER CIERRA GOMEZ	10565 FAIRFAX BLVD STE 202 FAIRFAX, VA 22030-3104
449	KT CONTRACTING & CONSTRUCTION LLC	KOURTNEY ARMSTRONG	13035 COUNTY ROAD 809 SWEENY, TX 77480-8264
450	ROYAL T SERVICES LLC		
451	REDFEATHER SOLUTIONS LLC	ALYSSA GARCIA	7400 CATFISH CT FALLON, NV 89406-7102
452	JO-KELL INC	JOHN KELLY	641 NE 26TH CT POMPANO BEACH, FL 33064-
453	GILL SQUARED FOR VETS LLC	MICHELLE GILL	200 GILL DR CLINTON, MS 39056-9643
454	EMERGENCY RESPONSE TEAM LLC		
455	PERRY CONTRACTING, LLC	DAISY CULVERHOUSE-PERRY	63 EDMAN LN FAIRMONT, WV 26554-7638
456	ROYAL STYLES, CORP.	KARINA MEDVEDEVA	3060 OCEAN AVE #1S BROOKLYN, NY 11235-3310
457	WEST COAST MECHANICAL INSULATION, INC.	LISA CHOATE	470 S HILLVIEW DR MILPITAS, CA 95035-5464
458	RDMC LLC	VALERIE GRAVES	10563 WESTCLIFF PL HIGHLANDS RANCH, CO 80130-6916
459	A & D EQUIPMENT INC	DONNA LAFATA	522 S HOOP POLE RD GUILFORD, CT 06437-1223
460	SHADES OF PARADISE LLC	MARILOU POLENDEY-SCOTT	150M E ADDENG ST DEDEDO, GU 96929-6561
461	SGI CONSTRUCTION LLC	ANGELA GOMEZ	1124 E GABRILLA DR CASA GRANDE, AZ 85122-6794
462	AEGIS, LLC	BEVERLY JERMAN	7252 KAYLA BETH CT OOLTEWAH, TN 37363-6271
463	KRAEMER CONTRACTING GROUP, INC.	CHRISTINE KRAEMER	603 COUNTRY CLUB DR STE A BENSENVILLE, IL 60106-1329
464	GLOBAL BEAMS INC.	ATIQA BHATTI	138 W. ARBOR CAMP CIR SPRING, TX 77389-5323
465	SUPPLY ON THE GO LLC	ROSSANNA CAMURUNGAN	3186 STATE ROUTE 27 STE 106 KENDALL PARK, NJ 08824-1513
			11228 STAGESTONE WAY

466	ALH DYNAMICS LLC	IMAN HOLMES	MANASSAS, VA 20109-7620
467	RED BALL EXPEDITERS LLC	DAVIDA NELUMS	223 N MAIN ST STE 105 SIKESTON, MO 63801-4211
468	TOBACCO RIDGE INC	ALLISON MOTSINGER	3888 REID ROAD TOBACCOVILLE, NC 27050-9416
469	KOHTLER ELEVATOR INDUSTRIES, INC.	VERONICA QUERALES	4111 NW 132ND ST UNIT E OPA LOCKA, FL 33054-4538
470	BUTTERFLY REALTY, LLC	TACHIKA PARKS	3175 MILLS CREEK CIR UNIT 5001 SCOTTDALE, GA 30079-4522
471	PROPERTY SCOPE INC	ANN FANGMAN	324 E MAIN ST UNIT 301 LOUISVILLE, KY 40202-1288
472	ADDON SERVICES LLC	PRITA ABRAHAM	27789 MOUND RD STE 200 WARREN, MI 48092-2697
473	M & T CONSTRUCTION AND PAINTING LLC	TATJANA GOTOVAC	7879 AIRWAY PARK DR APT C1 MOBILE, AL 36608-9695
474	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
475	PHD LLC	LEE RUDOLPH	4275 E 30TH PL STE B YUMA, AZ 85365-7570
476	AC GREEN LLC	CLAIRE GREEN	6648 HUDNELL RD ATHENS, OH 45701-8952
477	PREMIER PRODUCTION EQUIPMENT INC	STACEY SPIEGEL	6168 TURNERSVILLE RD CREEDMOOR, TX 78610-3920
478	C&R CONTRACTORS LLC	CAROL CANTRELL	1499 TRESTLE CV HORN LAKE, MS 38637-8525
479	YOUNG ELEVATOR INCORPORATED	KRISTINA CHAVEZ	1415 LAUREN LN #101 CALDWELL, ID 83605-5426
480	NO SWEAT KC LLC	MISTY DIXON	1451 NW 800TH RD HOLDEN, MO 64040-8419
481	HPS ENTERPRISES, LLC	BELINDA HOPSON	511 DEBBY LANE ADAMSVILLE, AL 35005-2111
482	GREEN STAR TECH LLC	SELAM DESTA	722 E MARKET ST STE 102 #V56 LEESBURG, VA 20176-4475
483	THE MAINSITE GROUP CORPORATION	KANDICE MERRICK	1507 MCARTHUR DRIVE DUNCANVILLE, TX 75137-4221
484	GEN L ELEVATOR, LLC	JACLYN LINEHAN	1504 DARCEY LANE DAVIDSONVILLE, MD 21035-1712

485	WALLA WATER INC	MCKENZIE LOVELACE	7400 W ARROWHEAD AVE KENNEWICK, WA 99336-1122
486	BUILDING ENVELOPE ASSESSMENT & REPAIR, LLC	CASEY BAKER	2290 TECHNICAL PKWY STE A CHARLESTON, SC 29406-4993
487	TRIANGLE GENERAL CONTRACTORS, INC.	DERVISH NIVOKAZI	39 COFFEY ST BROOKLYN, NY 11231-1509
488	TDSNSA LLC	TABITHA SPREWELL	4021 PERCIVAL RD APT 624 COLUMBIA, SC 29229-8367
489	APEX VENTURE LEAGUE LLC	MILTON AARON	4800 WOODFORD CIR BESSEMER, AL 35022-6995
490	SANDERS & SONS, LLC	SONYA PARTRIDGE	102 N. MAIN ST ENTERPRISE, AL 36330-2537
491	WEST OHIO TOOL CO	KACI KING	7311 WORLD CLASS DR RUSSELLS POINT, OH 43348-9593
492	E-QUAL CONSTRUCTION LLC	ERIKA FLORES	3 CHAD RD PERALTA, NM 87042-8486
493	TYNES PROPERTY MANAGEMENT LLC	KANDICE TYNES	1878 GRANDSTAND DR SAN ANTONIO, TX 78238-4507
494	EUNIQUE INVESTMENTS LLC	EUNICE STOCKDALE	1042 OLD BRECKENRIDGE LN MONTGOMERY, AL 36117-8960
495	CINKA CONSTRUCTION AND CONSULTING SERVICES LLC	CYNTHIA MARTIN	11746 LAKEWAY DR CURTICE, OH 43412-9411
496	SERVICE LIVING LLC		
497	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
498	ROADRUNNER EXPRESS CONSULTING, LLC	SHAREE LEGREE	2699 1/2 BEACHWOOD DR SUITE 4053 LOS ANGELES, CA 90068-2339
499	SYNCOR CONSULTING LLC	CRYSTAL BABB	1231 WALKERS WAY SAN ANTONIO, TX 78216-7714
500	WHEELHOUSE INDUSTRIES LLC	MARGARETANN MARKO	36 RED SCHOOL HOUSE RD LEBANON, NJ 08833-3227
501	VERONICA KEARNEY REAL ESTATE SERVICES, LLC	VERONICA KEARNEY	1508 OLD WATKINS RD RALEIGH, NC 27616-8540
502	SPARKLE ENTERPRISES LLC	SPARKLE CAMILLE SANDERS	14300 OAKLAND CT GRANDVIEW, MO 64030-2251
503	LD POWER INC	MARCY BLAIR	14440 MERIDIAN ROAD ELBERT, CO 80106-8811
504	TDP PROFESSIONALS, LLC	TERESA PHILLIPS	5990 KING WAY WALK LITHONIA, GA 30058-6172
			19123 JADE CANYON LN

505	TR&J LLC	THARESA FLORES	TOMBALL, TX 77377-7620
506	GH PARTS & COMPONENTS, INC.	HOPE PATTERSON	2409 N BROAD ST SELMA, AL 36701-4010
507	AMBER WILLIAMS CAPITAL LLC	AMBER WILLIAMS	102 E 5TH AVE AUGUSTA, KS 67010-1010
508	GD RESOURCES LLC	BASSO GHEE	502 KARN PL BRUNSWICK, MD 21716-1265
509	H & H CONSTRUCTION SERVICES OF FLORIDA, LLC	RHONDA HERRINGTON	10356 SHORECREST ROAD BILOXI, MS 36532-
510	BISHOP CLEAN CARE INC	JENNY SAVELLE	234 CEDRIC ST LEESBURG, GA 31763-4993
511	DEPENDABLE BUILDING SERVICES, INC	JANETTE TOMASELLI	1125 TOWER RD SCHAUMBURG, IL 60173-4305
512	C & L PUMP SERVICE, INC.	LUIS MAGALLANES	11227 PELLICANO DR STE B EL PASO, TX 79935-5303
513	SUNSTONE GLOBAL LLC	SHENA RAMNARINE	120 DELAWARE RD ABILENE, TX 79607-1110
514	RUSTY BUCKET CONSTRUCTION LLC	SHIRLEY ESCOBAR	614 E OVINGTON ST LANCASTER, CA 93535-3201
515	DUCE MADISON & ASSOCIATES	SHONITA HAWKINS-DODD	2 POST OFFICE RD STE 3B WALDORF, MD 20602-2726
516	J & J ELEVATOR SERVICES, INC.	JOYCE DEBROT	13412 E 249TH ST PECULIAR, MO 64078-8964
517	ALTA SOURCING PARTNERS LLC	MICHELLE ZELASKO	805 NORTH PAULINA AVENUE REDONDO BEACH, CA 90277-2250
518	COOLING COMPONENTS, INC.	ELIZABETH STREETER	69 N GORE AVE SAINT LOUIS, MO 63119-2330
519	ASCEND GLOBAL SUPPORT LLC	SEPEHR ARAGHI	4304 REDWOOD HIGHWAY STE 200 SAN RAFAEL, CA 94903-2103
520	INDUST LLC	SUSAN ARMBRUSTER	4037 FRANCES BERKELEY WILLIAMSBURG, VA 23188-1399
521	CLL SPECIALISTS CORP	CAROL LOVELESS	11925 STARCREST DR SAN ANTONIO, TX 78247-4111
522	PHARMA PARAPLUIE LLC	ABIDAH OTTLEY	7736 W GRANADA RD PHOENIX, AZ 85035-5066
523	RADFORD OVERHEAD DOORS INC.	EMILY SOULIOTES	9185 CHESAPEAKE DR SAN DIEGO, CA 92123-1002

524	TRD LOGISTICS LLC	DEANNA TIPTON	5172 CATES AVE SAINT LOUIS, MO 63108-1018
525	MIDWEST MILLWRIGHT SERVICES INC	MERRI CRUZ	3025 WALLIN AVE ROCKFORD, IL 61101-3447
526	FITZ ASSOCIATES LLC	JESUS URIBE	1955 FM 2001 STE 420 BUDA, TX 78610-2043
527	FLEXOVEYOR INDUSTRIES, INC.	TERESA GAGNA	3795 PARIS STREET UNIT B&C DENVER, CO 80239-3368
528	AMB CONTRACTING LLC	AVA BOWLES	7813 ALHAMBRA BLVD MIRAMAR, FL 33023-
529	RED FEATHER FEDERAL, LLC	MELISSA COOPER	2313 S BROADWAY AVE OKLAHOMA CITY, OK 73109-6023
530	ARS PRIME LOGISTICS, LLC	DENISE SHERMAN	1840 WESTERN AVE ALBANY, NY 12203-4624
531	MURADO LLC		
532	ALLIED RESPONSE INC.	WHITNEY LINDSAY	3076 COLORADO DR COPPERAS COVE, TX 76522-3279
533	TAWAKKULL LLC	FATIMA ABUBAKAR	2204 RONALD DR WEST NORRITON, PA 19403-1353
534	FOSTERED VETERANS CORP	STEVEN MAATOUK	7301 N LINCOLN AVE STE 197 LINCOLNWOOD, IL 60712-1745
535	AFLUX INDUSTRIALS L.L.C.	SHAUNELLE SANDY	7127 GOBLET WAY CLINTON, MD 20735-5813
536	LP		
537	TEMPERED INSULATION INC	BARBARA SWEENEY	180 S MAIN ST STE 205 AMBLER, PA 19002-4753
538	SATURN ENTERPRISES, INC.	MARIA MENZIES	27 YORK DR FORT WORTH, TX 76134-2546
539	NEXGEN CONSTRUCTION GROUP LLC	MICHELE BROWN	216 N MARKET ST WAVERLY, OH 45690-1137
540	ATHENA SERVICE SOLUTIONS LIMITED LIABILITY COMPANY	PAULETTE MCKENZIE	20 GREGORY FARM RD EASTON, CT 06612-2049
541	AGILE PRIVATE ENTERPRISE LLC	TAWANNA SARGENT	1725 BLUE STREAM DR DESOTO, TX 75115-3962
542	SLIPSTREAM EDI LLC	PAULA O'SHEA	61316 BRIANNE PL BEND, OR 97702-3066
543	D&A CONTRACTING LLC	KAITLYN DASHER	2950 SUMNER WAY PALM HARBOR, FL 34684-1600
544	RAINTREE SOURCING & SUPPLY, LLC	NICOLE MILNER	4932 W SAINT CHARLES AVE LAKE CHARLES, LA 70605-6756

545	ELITE IRON AND ELECTRIC, INC.	JOLIN FERDINAND	303 W RADIO RD PALM SPRINGS, CA 92262-1631
546	ELECTRA GRID SOLUTIONS LLC	GLENDA THOMAS	2350 HIGHWAY 31 NW HARTSELLE, AL 35640-4238
547	TRUE PRIORITY LOGISTICS, LLC	TAMIA SMALLS	2128 BENT GRASS AVE OCOEE, FL 34761-4884
548	PROPERTY MANAGEMENT ENTERPRISES, INC.	JENNIFER WALTON	255 ROSE APPLE LN NAPLES, FL 34114-2555
549	LIMITLESS NETWORK & SECURITY SERVICES LLC	SARAH WHEELER	11014 HAZEL LN BENTON, AR 72019-8491
550	FLOW OPTIMIZERS, LLC	DEANNA NELSEN	119 LAKELOCH DR LIZELLA, GA 31052-3324
551	FEDERAL TACTICAL LLC	ANGELA TOPIC	1010 LAKE SHORE DR APT 104 WEST PALM BEACH, FL 33403-2862
552	ADVANTAGE CONTRACTING SOLUTIONS, LLC	SHANE HERNANDEZ	1613 S CHURCH ST SMITHFIELD, VA 23430-1831
553	ELITE EXPERTISE, LLC	DANIELLE NEAL	1055 S BASSETT ST DETROIT, MI 48217-1668
554	TERESA D KINSEY	TERESA KINSEY	522 HIGHWAY 534 MINDEN, LA 71055-7508
555	GARRETT MCKENZIE, INC	APRIL HUGHES	1775 N BUTTERFIELD RD LIBERTYVILLE, IL 60048-1238
556	SHERMEZ LOGISTICS LLC	SHERRIE GOMEZ	24841 SW 120TH PL HOMESTEAD, FL 33032-5979
557	TITAN INSULATION LLC	KEIRA CHRISTENSEN	494 RUSSELL ST WOBURN, MA 01801-5349
558	FMS CONSULTING LLC	FAITH SHARP	225 1ST AVE N UNIT 904 SAINT PETERSBURG, FL 33701-3589
559	COOPER'S CREDIT CONSULTING INTERNATIONAL LLC	ADRIANNE COOPER	2524 N BROADWAY STE 509 EDMOND, OK 73034-4172
560	JAI CONSTRUCTION, LLC	JENA DUROUSSEAU	5501 OPELOUSAS ST LAKE CHARLES, LA 70615-3031
561	ELLE LOGISTICS COMPANY, LLC	HORTENSE ELLE	2093 ARBROTH CT WALDORF, MD 20601-3787
562	OAKRIDGE LLC	JOHN FRUIT FRUIT	4131 CAMPANA CT LAS CRUCES, NM 88011-2004
563	GLOBA TEK LLC	GLORIMAR KULINSKI	1701 LUBBOCK DR COPPERAS COVE, TX 76522-2187
			22522 GINOSA TRL

564	PHOENIXX SOLUTIONS LLC	MARY OLATUNDE	KATY, TX 77449-6872
565	1626 CONSTRUCTION LLC	LOURDES NEGRON	1626 CALLE SAN MATEO APT 802 SAN JUAN, PR 00912-3829
566	R MEANS REALTY LLC	RASHEEDAH ABDULMATEEN	1339 HOLCOMB AVE ATLANTA, GA 30344-4330
567	RTD SERVICES, LLC	LETESHIA RAMSEY	12711 HANDLES PEAK WAY PEYTON, CO 80831-4465
568	MBAN INDUSTRIES LLC	ANNETTE ACHONDUH	3817 VALLARTA LN ROUND ROCK, TX 78681-2354
569	SOUTHRIDGE BUILDERS LLC	REBECCA BUILDERS	3989 CRATER LAKE HWY MEDFORD, OR 97504-9742
570	COX SEEDLINGS CONTRACTS LLC	TAMIRRAH COX	110 SUNRISE RIDGE DR SALISBURY, NC 28146-6927
571	STELLARS PRECISIONS LLC	SHONTERIA ROGERS	8735 DUNWOODY PL STE 5614 ATLANTA, GA 30350-2995
572	THE FOOT BULLY, L.L.C	KRYSTLE CAVINESS	8954 DAWNRIDGE DR HOUSTON, TX 77071-2446
573	BLUE GROUP LLC	DOUGLAS ANDERSON	1364 YOUNG CIR TWIN FALLS, ID 83301-3041
574	DCT SPECIALTY CONSTRUCTION LLC	JESSICA SARANTAKIS	8501 E BONNIE ROSE AVE SCOTTSDALE, AZ 85250-6717
575	JM DEMOLITION, LLC	DANNI TASSINARI-PEETZ	44 MAIN ST ALTON, NH 03809-4621
576	MILLENIACORE LLC	AMBER SIMPSON	208 MAPLE BRANCH COURT MERIDIANVILLE, AL 35759-2477
577	PIONEER EQUIPMENT RENTAL LLC	BRANDI MARTIN	17525 BROAD ST MONTVERDE, FL 34756-3202
578	J6 LEGACY, LLC	KATHERINE JOHNSON	3931 ROBINDALE DR DOUGLASVILLE, GA 30135-7272
579	HIGH VALLEY PRODUCTS, INC	GINNY LLEWELLYN	1134 W 850 N CENTERVILLE, UT 84014-3400
580	DMGZ CONSTRUCTION, LLC	NOEMI DOMINGUEZ	21840 BRIGGS COLEMAN RD HARLINGEN, TX 78550-1724
581	INNOVATIVE EQUIPMENT SOLUTIONS GROUP INC.		
582	7 POINT LLC	ALESHIA ROHRER	3900 ROYAL PALM DR SAINT JAMES CITY, FL 33956-2243
583	BEE PROMPT LLC	BELINDA GRAY	301 UNION STATION DR CALERA, AL 35040-8305
			10137 KINGHORN RD

584	SHACRIDDLE CONTRACTING, LLC	CRYSTAL KINGHORN	GLEN ST MARY, FL 32040-2459
585	BEKA'S SUPPLY COMPANY, LLC	REBEKAH RICH	2350 CYPRESS POND RD APT 1505 PALM HARBOR, FL 34683-1507
586	CINTEOT INC.	THOMAS HUNT	3000 PRESIDENTIAL DR STE 170 FAIRBORN, OH 45324-6817
587	VETS FIRE AND LIFE SAFETY, LLC	ERICKA OXFORD	7 SHERRI LN SAINT PETERS, MO 63376-2142
588	GREEN DESIGN TECHNOLOGIES, LLC	SPENCER PARKER	1952 HUNTINGTON HALL CT ATLANTA, GA 30338-5713
589	CAPROCK INDUSTRIAL LLC	TAZIA VAN JOHNSON	1100 W TOWN AND COUNTRY RD STE 1250 ORANGE, CA 92868-4633
590	ASTRALLIC INC.	HARIS MUNAWAR	6710 ELDERMILL LN GAINESVILLE, VA 20155-4435
591	LET US DO THIS, LLC	LISENNY RODRIGUEZ	1301 COPPER CT APT 1301 NEW WINDSOR, NY 12553-4504
592	ATT ELEVATOR CONSULTING LLC	ADELE MOLINARO	723 PINTA DR ST PETERSBURG, FL 33715-
593	K-EPPS LLC	KIM EPPS	251 STEVENS ST APPOMATTOX, VA 24522-8296
594	JO KELL INC	MARY KOPF	1010 W 19TH ST NATIONAL CITY, CA 91950-5410
595	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133

Notice of Opportunity



Jessica Monreal
To Jessica Monreal

Reply | Reply All | Forward | ...

Tue 5/6/2025 8:27 AM

Dear Vendor,

The Interlocal Purchasing System (TIPS) is required under Federal regulations to notify SBA vendors of our procurement solicitations. You were registered on the United States Small Business Administration website under one or more of the following NAICS Codes, 423830,333921,238290 which include the topic of this Solicitation.

The Interlocal Purchasing System (TIPS) has available now, at the link below, Solicitation 250502 Elevators and Servicing (2 Part with JOC. You are invited to participate.

https://tips.ionwave.net/HomePage.aspx

Please note that there is no specific project to award. TIPS utilizes IDIQ Contracts, where IDIQ is an abbreviation of the term "Indefinite Delivery/Indefinite Quantity". This is a type of contract that provides an indefinite quantity of supplies or services during a fixed period of time or for the life of the awarded agreement. This solicitation was issued as a prospective award for a pricing agreement to be used when a TIPS Member entity needs the goods or services offered under the agreement.

Thank you,

Jessica Monreal
Paralegal
Leon Alcala, PLLC
ESC Region 8/The Interlocal Purchasing System (TIPS)
4845 Highway 271 North
Pittsburg, TX,75686
Telephone: (866) 839-8477
Direct Line: (903) 575-2704
www.tips-usa.com

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Company Name	Contact Person	Mailing Address	City	State	Zip
ACUMEN ENTERPRISES, INC.	Wayne Boyter	PO BOX 673,	DESOTO	TX	75123-(
THE BUTLER ENTERPRISES	Cass Butler	104 E OVILLA RD,#2684	RED OAK	TX	75154-9
1ST CONSTRUCTION TRADES, LLC	Mike Jones	2021 GUADALUPE,STE. #260	AUSTIN	TX	78705-5
NORTHVIEW COMPANY LLC	Sarah Velten	6445 CEDAR SPRINGS RD,SUITE 213	DALLAS	TX	75235
EUPHORIA MOVING COMPANY	Victoria Bradley	3200 REXFORD DR,	AUSTIN	TX	78723-4
NEW LIFE INDUSTRIES, LLC	RODRICK ROBINSON	1402 S CUSTER RD,SUITE 504	MCKINNEY	TX	75072-1
OPTIMAL STRATEGIC SOLUTIONS	Robert Beasley	1277 JONES TRL,	LEWISVILLE	TX	75077-2
DENSITY6 LLC	Antonio T Smith Jr	16821 BUCCANEER LN,SUITE 200	HOUSTON	TX	77058-2
OPEN PRAIRIE PATRIOT ENTERPRISES LLC	Enrique Costas	121 SCENIC RIDGE DR,	WEATHERFORD	TX	76087-1
Mechanical Materials, LLC	Jackie Herrera	2250 Dickinson Ave,Building D	Dickinson	TX	77539-(
MAXA ELEVATOR SOLUTIONS, LLC	Xochitl P Aguilar	8310 BARKLEY ST,	HOUSTON	TX	77017-4

FIDIS SOLUTIONS GROUP, LLC	Antonia Murphy	5702 SPRING CYPRESS RD,SUITE C-7	SPRING	TX	77379-3
JS TOTAL SERVICE, INC.	Ivy M Lanier	478 TOWER ROAD,	SAN ANTONIO	TX	78223-6
K3 SALES AND SERVICES LLC	Jaclyn Hernandez	1321 S EDDY ST,	PECOS	TX	79772-5
TEJAS ELEVATOR CO.	Courtney Niemtschk	PO BOX 2172,	MANCHACA	TX	78652-2
ELEVATOR REPAIR SERVICE, INC.	Sandra Stafford	P.O. BOX 11037,	HOUSTON	TX	77293-1
JC BUILDING SOLUTIONS, LLC	Christy Crowson	3609 COUNTY ROAD 7660,	LUBBOCK	TX	79423-4
G2 CONSTRUCTION SERVICES, INC.	Jyl Gibson	3303 SHELL RD,SUITE 3	GEORGETOWN	TX	78628-9
PYTT SERVICE LLC	Stephanie Harris	13908 LYNDON B JOHNSON ST,	MANOR	TX	78653-4
MOVE SOLUTIONS, LTD.	Linda Monette	2201 CHEMSEARCH BLVD,	IRVING	TX	75062-6
PINION 91 CONTRACTING, LLC	John Gusti	15440 LANDING CREEK LN,	ROANOKE	TX	76262-3
RELIANT ELEVATOR INSPECTIONS & CONSULTIN	Shari Fricke	5020 RUNNING BROOK DRIVE,	JOSHUA	TX	76058-5
RIGHT CHOICE DEVELOPMENT AND CONSTRUCTIO	Danielle Wright	25626 SADDLEBROOK WAY,	KATY	TX	77494-5

LARGIN CONSTRUCTION SERVICES, LLC	President Jerry Jo Largin	6645 Long Meadow Dr.,	CORPUS CHRISTI	TX	78413-2
MID-TEX CONTRACTING LLC	GARY SIMS	2341 STATE HIGHWAY 22,	WHITNEY	TX	76692-3

HUB Notice of Opportunity



Jessica Monreal

To Jessica Monreal

Bcc 'wayne@acumen-enterprises.com'; 'cass@TheButlerEnterprises.com'; '1stcontructiontrades@gmail.com'; 'svelten@northviewco.com'; 'euphoriamovers@gmail.com'; 'RODRICK.ROBINSON@NEWLIFEHME.COM'; 'lewisbeasley381@gmail.com'; 'admin@densitysix.com'; 'partners@op2ellc.com'; 'Jackie@mechanicalmaterials.com'; 'maxaelevatorsolutions@gmail.com'; 'a.ramirez@fidis-s-group.com'; 'ivy@jstotalservice.com'; 'admin@k3salesandservices.com'; 'courtney@tejaselevator.com'; 'Sandie@elevatorsus.com'; **+9 others**

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Tue 5/6/2025 8:13 AM

Dear Vendor,

You were registered on the State of Texas CMBL website under one or more of the following NIGP codes, 295-00,910-13 which include the topic of the following solicitation.

The Interlocal Purchasing System (TIPS) has available now, at the link below, Solicitation 250502 Elevators and Servicing (2 Part with JOC). You are invited to participate.

https://tips.ionwave.net/CurrentSourcingEvents.aspx

Please note that there is no specific project to award. TIPS utilizes IDIQ Contracts, where IDIQ is an abbreviation of the term “Indefinite Delivery/Indefinite Quantity”. This is a type of contract that provides an indefinite quantity of supplies or services during a fixed period of time or for the life of the awarded agreement. This solicitation was issued as a prospective award for a pricing agreement to be used when a TIPS Member entity needs the goods or services offered under the agreement.

Thank you,

Jessica Monreal
Paralegal
Leon Alcala, PLLC
ESC Region 8/The Interlocal Purchasing System (TIPS)
4845 Highway 271 North
Pittsburg, TX,75686
Telephone: (866) 839-8477
Direct Line: (903) 575-2704
www.tips-usa.com

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Notice of Opportunity May 2025



Jessica Monreal
To ray@mbdadallas.com; admin@mbdadallas.com

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Mon 5/5/2025 11:03 AM

Dear MBDA,

The Interlocal Purchasing System (TIPS) is required under Federal regulations to work with the MBDA in an effort to notify potential vendors of our procurement solicitations.

You are invited to notify and encourage the companies you assist to participate in these opportunities. TIPS present procurement solicitations are available at the following link:

https://www.tips-usa.com/rfp.cfm.

Thank you,

Jessica Monreal
Paralegal
Leon Alcala, PLLC
ESC Region 8/The Interlocal Purchasing System (TIPS)
4845 Highway 271 North
Pittsburg, TX,75686
Telephone: (866) 839-8477
Direct Line: (903) 575-2704
www.tips-usa.com

The contents of this email are intended for the addressee(s) and may contain confidential and/or privileged information which may be legally protected from disclosure. If you are not the intended recipient of this message, please immediately alert the sender by reply email and delete this message and any attachments as further dissemination is prohibited. For communications with anyone other than employees and contractors of TIPS/ESC 8, No attorney/client relationship is created and no legal advice is provided. Emails to employees and contractors of TIPS/ESC 8 shall be considered a privileged communication unless determined by this attorney or a court of competent jurisdiction to the contrary.

TIPS VENDOR AGREEMENT (Part 1)

TIPS RFP 250502 Elevators and Servicing (PART 1)

The following Vendor Agreement ("Agreement") creates a legal agreement between The Interlocal Purchasing System ("TIPS"), a government purchasing cooperative and Department of Texas Region 8 Education Service Center and (INSERT ENTITY NAME):

United Elevator Services, LLC

(ENTER ENTITY NAME)

its owners, agents, subsidiaries, and affiliates (together, "Vendor") (individually, "Party", and collectively the "Parties") and this agreement shall exclusively govern the contractual relationship ("Agreement") between the Parties for Part 1 of the related solicitation opportunity. If Vendor proposes and is awarded on Part 2, a separate Part 2 Vendor Agreement shall control Part 2 terms.

TIPS, a governmental entity and a national purchasing cooperative seeks to provide a valuable and necessary solution to public entities and qualifying non-profits by performing the public procurement solicitation process and awarding compliant contracts to qualified vendors. Then, where the law of a customer's jurisdiction allows, instead of public entities and qualifying non-profits expending time, money, and resources on the extensive public procurement process, the use of TIPS allows public entities to quickly select and purchase their preferred products or services from qualified, competitively evaluated vendors through cooperative purchasing.

1. **Purpose.** The purpose of this Agreement is to identify the terms and conditions of the relationship between TIPS and Vendor. Public entities and qualifying non-profits that properly join or utilize TIPS ("TIPS Members") may elect to "piggyback" off of TIPS' procurements and agreements where the laws of their jurisdiction allow. TIPS Members are not contractual parties to this Agreement although terms and conditions of this Agreement may ensure benefits to TIPS Members.
ex
2. **Authority.** The Parties agree that the signatories below are individual authorized to enter into this Agreement on behalf of their entity and that they are acting under due and proper authority under applicable law.

3. **Definitions.**

    a. **TIPS Pricing:** The specific pricing, discounts, and other pricing terms and incentives which Vendor submitted and TIPS approved for each respective TIPS Contract awarded to Vendor and all permissible, subsequent pricing updates submitted by Vendor and accepted by TIPS, if any.

    b. **Authorized Reseller:** A reseller or dealer authorized and added by a Vendor through their online TIPS Vendor Portal to make TIPS sales according to the terms and conditions herein.

4. **Entire Agreement.** This Agreement resulted from TIPS posting a Part 1 "TIPS Solicitation" (RFP, RCSP, RFQ, or other) and Vendor submitting a proposal in response to that posted TIPS Solicitation for evaluation and award. The Parties agree that this Agreement consists of the provisions set forth herein and: (1) The Part 1 TIPS solicitation document resulting in this Agreement; (2) Any Part 1 addenda or clarifications issued in relation to the TIPS solicitation; (3) All Part 1 solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor's entire Part 1 proposal response to the TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, pricing, accepted responses to questions, and accepted written clarifications of Vendor's proposal, and; any properly included attachments to this Agreement. All documentation and information listed is hereby incorporated by reference as if set forth herein verbatim. In the event of conflict between the terms herein and one of the incorporated documents the terms and conditions herein shall control.

5. **Vendor's Specific Warranties, Terms, and License Agreements.** Because TIPS serves public entities and non-profits throughout the nation all of which are subject to specific laws and policies of their jurisdiction, as a matter of standard practice, TIPS does not typically accept a Vendor's specific "Sale Terms" (warranties, license agreements, master agreements, terms and conditions, etc.) on behalf of all TIPS Members. TIPS may permit Vendor to attach those to this Agreement to display to interested customers what terms may apply to their Supplemental Agreement with Vendor (if submitted by Vendor for that purpose). However, unless this term of the Agreement is negotiated and modified to state otherwise, those specific Sale Terms are not accepted by TIPS on behalf of all TIPS Members and each Member may choose whether to accept, negotiate, or reject those specific Sale Terms, which must be reflected in a separate agreement between Vendor and the Member in order to be effective.

6. **Vendor Identity and Contact Information.** It is Vendor's sole responsibility to ensure that all identifying vendor information (name, EIN, d/b/a's, etc.) and contact information is updated and current at all times within the TIPS eBid System and the TIPS Vendor Portal. It is Vendor's sole responsibility to confirm that all e-correspondence issued from tips-usa.com, ionwave.net, and tipsconstruction.com to Vendor's contacts are received and are not blocked by firewall or other technology security. Failure to permit receipt of correspondence from these domains and failure to keep vendor identity and contact information current at all times during the life of the contract may cause loss of TIPS Sales, accumulating TIPS fees, missed rebid opportunities, lapse of TIPS Contract(s), and unnecessary collection or legal actions against Vendor. It is no defense to any of the foregoing or any breach of this Agreement that Vendor was not receiving TIPS' electronic communications issued by TIPS to Vendor's listed contacts.

7. **Initiation of TIPS Sales.** When a public entity initiates a purchase with Vendor, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Once verified, Vendor must include the TIPS Contract Number on all purchase communications and sales documents exchanged with the TIPS Member.

8. **TIPS Sales and Supplemental Agreements.** The terms of the specific TIPS order, including but not limited to: shipping, freight, insurance, delivery, fees, bonding, cost, delivery expectations and location, returns, refunds, terms, conditions, cancellations, order assistance, etc., shall be controlled by the purchase agreement (Purchase Order, Contract, Invoice, etc.) (hereinafter "Supplemental Agreement") entered into between the TIPS Member Customer and Vendor only. TIPS is not a party to any Supplemental Agreement. All Supplemental Agreements shall include Vendor's Name, as known to TIPS, and TIPS Contract Name and Number. Vendor accepts and understands that TIPS is not a legal party to TIPS Sales and Vendor is solely responsible for identifying fraud, mistakes, unacceptable terms, or misrepresentations for the specific order prior to accepting. Vendor agrees that any order issued from a customer to Vendor, even when processed through TIPS, constitutes a legal contract between the customer and Vendor only. When Vendor accepts or fulfills an order, even when processed through TIPS, Vendor is representing that Vendor has carefully reviewed the order for legality, authenticity, and accuracy and TIPS shall not be liable or responsible for the same. In the event of a conflict between the terms of this TIPS Vendor Agreement and those contained in any Supplemental Agreement, the provisions set forth herein shall control unless otherwise agreed to and authorized by the Parties in writing within the Supplemental Agreement.

9. **Right of Refusal.** Vendor has the right not to sell to a TIPS Member under the awarded agreement at Vendor's discretion unless otherwise required by law.

10. **Reporting TIPS Sales**. Vendor must report all TIPS Sales to TIPS. If a TIPS sale is initiated by Vendor receiving a TIPS Member's purchase order from TIPS directly, Vendor may consider that specific TIPS Sale reported. Otherwise, with the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the purchase order or similar purchase document (with Vendor's Name, as known to TIPS, and the TIPS Contract Name and Number included) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion. Please refer to the TIPS Accounting FAQ's for more information about reporting sales and if you have further questions, contact the Accounting Team at accounting@tips-usa.com.

11. **TIPS Administration Fees.** The collection of administrative fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The administration fee ("TIPS Administration Fee") is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of the amount paid by the TIPS Member for each TIPS Sale, less shipping cost, bond cost, and taxes if applicable and identifiable, which is legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published in the corresponding solicitation and is incorporated herein by reference. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member, not on the Vendor's cost or on the amount for which the Vendor sold the item to a dealer or Authorized Reseller. Upon receipt of payment for a TIPS Sale, including partial payment (which renders TIPS Administration Fees immediately due), Vendor shall issue to TIPS the corresponding TIPS Administration Fee payment as soon as possible but not later than thirty-one calendar days following Vendor's receipt of payment. Vendor shall pay TIPS via check unless otherwise agreed to by the Parties in writing. Vendor shall include clear documentation with the issued payment dictating to which sale(s) the amount should be applied. Vendor may create a payment report within their TIPS Vendor Portal which is the preferred documentation dictating to which TIPS Sale(s) the amount should be applied. Failure to pay all TIPS Administration Fees pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion as well as the initiation of collection and legal actions by TIPS against Vendor to the extent permitted by law. Any overpayment of participation fees to TIPS by Vendor will be refunded to the Vendor

within ninety (90) days of receipt of notification if TIPS receives written notification of the overpayment not later than the expiration of six (6) months from the date of overpayment and TIPS determines that the amount was not legally due to TIPS pursuant to this agreement and applicable law. Any notification of overpayment received by TIPS after the expiration of six (6) months from the date that TIPS received the payment will render the overpayment non-refundable. Region 8 ESC and TIPS reserve the right to extend the six (6) month deadline if approved by the Region 8 ESC Board of Directors. TIPS reserves all rights under the law to collect TIPS Administration Fees due to TIPS pursuant to this Agreement.

12. **Term of the Agreement.** This Agreement with TIPS is for approximately three years with a one-year, consecutive option for renewal as described herein. Renewal options are not automatic and shall only be effective if offered by TIPS at its sole discretion. If TIPS offers a renewal option, the Vendor will be notified via email issued to Vendor's then-listed Primary Contact. The renewal option shall be deemed accepted by Vendor unless Vendor notifies TIPS of its objection to the renewal option in writing and confirms receipt by TIPS.

    Actual Effective Date: Agreement is effective upon signature by authorized representatives of both Parties. The Effective Date does not affect the "Term Calculation Start Date."

    Term Calculation Start Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, Vendor shall calculate the foregoing term as starting on the last day of the month that "Award Notifications" are anticipated as published in the Solicitation, regardless of the actual Effective Date.

    Example of Term Calculation Start Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 in this example.

    Contract Expiration Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, the term expiration date shall be three-years from the Term Calculation Start Date.

    Example of Contract Expiration Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 and the Contract Expiration Date of the resulting initial "three-year" term, (which is subject to an extension(s)) will be May 31, 2026 in this example.

    Option(s) for Renewal: Any option(s) for renewal shall begin on the Contract Expiration Date, or the date of the expiration of the prior renewal term where applicable, and continue for the duration specified for the renewal option herein.

    Example of Option(s) for Renewal: In this example, if TIPS offers a one-year renewal and the Contract Expiration Date is May 31, 2026, then the one-year renewal is effective from May 31, 2026 to May 31, 2027.

    TIPS may offer to extend Vendor Agreements to the fullest extent the TIPS Solicitation resulting in this Agreement permits.

13. **TIPS Pricing.** Vendor agrees and understands that for each TIPS Contract that it holds, Vendor submitted, agreed to, and received TIPS' approval for specific pricing, discounts, and other pricing terms and incentives which make up Vendor's TIPS Pricing for that TIPS Contract ("TIPS Pricing"). Vendor confirms that Vendor will not add the TIPS Administration Fee as a charge or line-item in a TIPS Sale. Vendor hereby certifies that Vendor shall only offer goods and services through this TIPS Contract if those goods and services are included in or added to Vendor's TIPS Pricing and approved by TIPS. TIPS reserves the right to review Vendor's pricing update requests as specifically as line-item by line-item to determine compliance. However, Vendor contractually agrees that all submitted pricing updates shall be within the original terms of the Vendor's TIPS Pricing (scope, proposed discounts, price increase limitations, and other pricing terms and incentives originally proposed by Vendor) such that TIPS may accept Vendors price increase requests as submitted without additional vetting at TIPS discretion. Any pricing quoted by Vendor to a TIPS Member or on a TIPS Quote shall never exceed Vendor's TIPS Pricing for any good or service offered through TIPS. TIPS Pricing price increases and modifications, if permitted, will be honored according to the terms of the solicitation and Vendor's proposal, incorporated herein by reference.

14. **Indemnification of TIPS.** **VENDOR AGREES TO INDEMNIFY, HOLD HARMLESS, AND DEFEND TIPS, TIPS MEMBERS, TIPS OFFICERS, TIPS EMPLOYEES, TIPS DIRECTORS, AND TIPS TRUSTEES (THE "TIPS INDEMNITEES") FROM AND AGAINST ALL CLAIMS AND SUITS BY THIRD-PARTIES FOR DAMAGES, INJURIES TO PERSONS (INCLUDING DEATH), PROPERTY DAMAGES, LOSSES, EXPENSES, FEES, INCLUDING COURT COSTS, ATTORNEY'S FEES, AND EXPERT FEES, ARISING OUT OF OR RELATING TO VENDOR'S PERFORMANCE UNDER THIS AGREEMENT (INCLUDING THE PERFORMANCE OF VENDOR'S OFFICERS, EMPLOYEES, AGENTS, AUTHORIZED RESELLERS, SUBCONTRACTORS, LICENSEES, OR INVITEES), REGARDLESS OF THE NATURE OF THE CAUSE OF ACTION, INCLUDING WITHOUT LIMITATION CAUSES OF ACTION BASED UPON COMMON, CONSTITUTIONAL, OR STATUTORY LAW OR BASED IN**

WHOLE OR IN PART UPON ALLEGATIONS OF NEGLIGENT OR INTENTIONAL ACTS OR OMISSIONS ON THE PART OF VENDOR, ITS OFFICERS, EMPLOYEES, AGENTS, AUTHORIZED RESELLERS, SUBCONTRACTORS, LICENSEES, OR INVITEES. NO LIMITATION OF LIABILITY FOR DAMAGES FOR PERSONAL INJURY OR PROPERTY DAMAGE ARE PERMITTED OR AGREED TO BY TIPS. APART FROM THIS INDEMNIFICATION PROVISION REQUIRING INDEMNIFICATION OF THE TIPS INDEMNITEES' ATTORNEY'S FEES AS SET FORTH ABOVE, RECOVERY OF ATTORNEYS' FEES BY THE PREVAILING PARTY IS AUTHORIZED ONLY IF AUTHORIZED BY TEX. EDUC. CODE § 44.032(F).

15. **Indemnification and Assumption of Risk – Vendor Data.** **VENDOR AGREES THAT IT IS VOLUNTARILY PROVIDING DATA (INCLUDING BUT NOT LIMITED TO: VENDOR INFORMATION, VENDOR DOCUMENTATION, VENDOR'S PROPOSALS, VENDOR PRICING SUBMITTED OR PROVIDED TO TIPS, TIPS CONTRACT DOCUMENTS, TIPS CORRESPONDENCE, VENDOR LOGOS AND IMAGES, VENDOR'S CONTACT INFORMATION, VENDOR'S BROCHURES AND COMMERCIAL INFORMATION, VENDOR'S FINANCIAL INFORMATION, VENDOR'S CERTIFICATIONS, AND ANY OTHER VENDOR INFORMATION OR DOCUMENTATION, INCLUDING WITHOUT LIMITATION SOFTWARE AND SOURCE CODE UTILIZED BY VENDOR, SUBMITTED TO TIPS BY VENDOR AND ITS AGENTS) ("VENDOR DATA") TO TIPS. FOR THE SAKE OF CLARITY, AND WITHOUT LIMITING THE BREADTH OF THE INDEMNITY OBLIGATIONS IN SECTION 14 ABOVE, VENDOR AGREES TO PROTECT, INDEMNIFY, AND HOLD THE TIPS INDEMNITEES HARMLESS FROM AND AGAINST ANY AND ALL LOSSES, CLAIMS, ACTIONS, DEMANDS, ALLEGATIONS, SUITS, JUDGMENTS, COSTS, EXPENSES, FEES, INCLUDING COURT COSTS, ATTORNEY'S FEES, AND EXPERT FEES AND ALL OTHER LIABILITY OF ANY NATURE WHATSOEVER ARISING OUT OF OR RELATING TO: (I) ANY UNAUTHORIZED, NEGLIGENT OR WRONGFUL USE OF, OR CYBER DATA BREACH INCIDENT AND VIRUSES OR OTHER CORRUPTING AGENTS INVOLVING, VENDOR'S DATA, PRICING, AND INFORMATION, COMPUTERS, OR OTHER HARDWARE OR SOFTWARE SYSTEMS, AND; (II) ALLEGATIONS OR CLAIMS THAT ANY VENDOR DATA INFRINGES ON THE INTELLECTUAL PROPERTY RIGHTS OF A THIRD-PARTY OR VENDOR.**

16. **Procedures Related to Indemnification.** In the event that an indemnity obligation arises, Vendor shall pay all amounts set forth in Section 14 and 15 above (including any settlements) and – if it has accepted its indemnity obligation without qualification – control the legal defense to such claim or cause of action, including without limitation attorney selection, strategy, discovery, trial, appeal, and settlement, and TIPS shall, at Vendor's cost and expense (with respect to reasonable out of pocket costs and expenses incurred by TIPS which shall be reimbursed to TIPS by Vendor), provide all commercially reasonable assistance requested by Vendor. In controlling any defense, Vendor shall ensure that all assertions of governmental immunity and all applicable pleas and defenses shall be promptly asserted.

17. **Indemnity for Underlying Sales and Supplemental Agreements.** Vendor shall be solely responsible for any customer claims or any disputes arising out of TIPS Sales or any Supplemental Agreement as if sold in the open-market. The Parties agree that TIPS shall not be liable for any claims arising out of Vendor's TIPS Sales or Supplemental Agreements, including but not limited to: allegations of product defect or insufficiency, allegations of service defect or insufficiency, allegations regarding delivery defect or insufficiency, allegations of fraud or misrepresentation, allegations regarding pricing or amounts owed for TIPS sales, and/or allegations regarding payment, over-payment, under-payment, or non-payment for TIPS Sales. Payment/Drafting, overpayment/over-drafting, under-payment/under-drafting, or non-payment for TIPS Sales between customer and Vendor and inspections, rejections, or acceptance of such purchases shall be the exclusive respective obligations of Vendor/Customer, and disputes shall be handled in accordance with the terms of the underlying Supplemental Agreement(s) entered into between Vendor and Customer. Vendor acknowledges that TIPS is not a dealer, subcontractor, agent, or reseller of Vendor's goods and services and shall not be responsible for any claims arising out of alleged insufficiencies or defects in Vendor's goods and services, should any arise.

18. **Confidentiality of Vendor Data.** Vendor understands and agrees that by signing this Agreement, all Vendor Data is hereby released to TIPS, TIPS Members, and TIPS third-party administrators to effectuate Vendor's TIPS Contract except as provided for herein. The Parties agree that Vendor Data is accessible by all TIPS Members as if submitted directly to that TIPS Member Customer for purchase consideration. If Vendor otherwise considers any portion of Vendor's Data to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code (the "Public Information Act") or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form which is required to be submitted as part of Vendor's proposal resulting in this Agreement and incorporated by reference. The Confidentiality Claim Form included in Vendor's proposal and incorporated herein by reference is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a Public Information Request. If TIPS receives a request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor Data deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law, including Attorney General determination and opinion. In the event that TIPS receives a written request for information pursuant to the Public Information Act that affects Vendor's interest in any information or data furnished to TIPS by Vendor, and TIPS requests an opinion from the Attorney General, Vendor may, at its own option and expense, prepare comments and submit information directly to the Attorney General stating why the requested information is exempt from disclosure pursuant to the requirements of the Public Information Act. Vendor is solely responsible for submitting the memorandum brief and information to the Attorney General

within the time period prescribed by the Public Information Act. Notwithstanding any other information provided in this solicitation or Vendor designation of certain Vendor Data as confidential or proprietary, Vendor's acceptance of this TIPS Vendor Agreement constitutes Vendor's consent to the disclosure of Vendor's Data, including any information deemed confidential or proprietary, to TIPS Members or as ordered by a Court or government agency, including without limitation the Texas Attorney General. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation by TIPS Members or as required by law.

19. **Vendor's Authorized Resellers.** TIPS recognizes that many vendors operate in the open market through the use of resellers or dealers. For that reason, TIPS permits Vendor to authorize Authorized Resellers within its Vendor Portal and make TIPS Sales through the Authorized Reseller(s). Once authorized by Vendor in the Vendor Portal, the Authorized Reseller(s) may make TIPS sales to TIPS Members. However, all purchase documents must include: (1) Authorized Reseller's Name; (2) Vendor's Name, as known to TIPS, and; (3) Vendor's TIPS Contract Name and Number under which it is making the TIPS Sale. Either Vendor or Reseller may report the sale pursuant to the terms herein. However, Vendor agrees that it is legally responsible for all reporting and fee payment as described herein for TIPS Sales made by Authorized Resellers. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member, not on the Vendor's cost or on the amount for which the Vendor sold the item to a dealer or Authorized Reseller. The Parties intend that Vendor shall be responsible and liable for TIPS Sales made by Vendor's Authorized Resellers. Vendor agrees that it is voluntarily authorizing this Authorized Reseller and in doing so, Vendor agrees that it is doing so at its own risk and agrees to protect, indemnify, and hold TIPS harmless in accordance with Sections 14-17 above related to Authorized Reseller TIPS Sales made pursuant to this Agreement or purporting to be made pursuant to this Agreement that may be asserted against Vendor whether rightfully brought or otherwise. The Parties further agree that it is no defense to Vendor's breach of this Agreement that an Authorized Reseller caused Vendor of breach this Agreement.

20. **Circumvention of TIPS Sales**. When a public entity initiates a purchase with Vendor, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Any request for quote, customer communication, or customer purchase initiated through or referencing a TIPS Contract shall be completed through TIPS pursuant to this Agreement. Any encouragement or participation by Vendor in circumventing a TIPS sale being completed may result in immediate termination of Vendor's TIPS Contract(s) for cause as well as preclusion from future TIPS opportunities at TIPS sole discretion.

21. **State of Texas Franchise Tax.** By signature hereon, Vendor hereby certifies that Vendor is not currently delinquent in the payment of any franchise taxes owed to the State of Texas under Chapter 171 of the Texas Tax Code.

22. **Termination.**

A) Termination for Convenience. TIPS may, by written notice to Vendor, terminate this Agreement for convenience, in whole or in part, at any time by giving thirty (30) days' written notice to Vendor of such termination, and specifying the effective date thereof.

B) Termination for Cause. If Vendor fails to materially perform pursuant to the terms of this Agreement, TIPS shall provide written notice to Vendor specifying the default. If Vendor does not cure such default within thirty (30) days, TIPS may terminate this Agreement, in whole or in part, for cause. If TIPS terminates this Agreement for cause, and it is later determined that the termination for cause was wrongful, the termination shall automatically be converted to and treated as a termination for convenience.

C) Vendor's Termination. If TIPS fails to materially perform pursuant to the terms of this Agreement, Vendor shall provide written notice to TIPS specifying the default ("Notice of Default"). If TIPS does not cure such default within thirty (30) days, Vendor may terminate this Agreement, in whole or in part, for cause. If Vendor terminates this Agreement for cause, and it is later determined that the termination for cause was wrongful, the termination shall automatically be converted to and treated as a termination for convenience.

D) Upon termination, all TIPS Sale orders previously accepted by Vendor shall be fulfilled and Vendor shall be paid for all TIPS Sales executed pursuant to the applicable terms. All TIPS Sale orders presented to Vendor but not fulfilled by Vendor, prior to the actual termination of this agreement shall be honored at the option of the TIPS Member. TIPS shall submit to Vendor an invoice for any outstanding TIPS Administration Fees and approved expenses and Vendor shall pay such fees and expenses within 30 calendar days of receipt of such valid TIPS invoice. Vendor acknowledges and agrees that continued participation in TIPS is subject to TIPS' sole discretion and that any Vendor may be removed from the TIPS program at any time with or without cause. This

termination clause does not affect TIPS Sales Supplemental Agreements pursuant to this term regarding termination and the Survival Clause term.

E) Vendor hereby waives any and all claims for damages, including, but not limited, to consequential damages or lost profits, that might arise from TIPS' act of terminating this Agreement.

23. Survival Clause. It is the intent of the Parties that this Agreement and procurement method applies to any TIPS Sale made during the life of this Agreement even if made on or near the Contract Expiration Date as defined herein. Thus, all TIPS Sales, including but not limited to: leases, service agreements, license agreements, open purchase orders, warranties, and contracts, even if they extend months or years past the TIPS Contract Expiration Date, shall survive the expiration or termination of this Agreement subject to the terms and conditions of the Supplemental Agreement between Customer and Vendor or unless otherwise specified herein.

24. Audit Rights. Due to transparency statutes and public accountability requirements of TIPS and TIPS Members, Vendor shall at their sole expense, maintain documentation of all TIPS Sales for a period of three years from the time of the TIPS Sale. In order to ensure and confirm compliance with this agreement, TIPS shall have authority to conduct audits of Vendor's TIPS Pricing or TIPS Sales with thirty-days' notice unless the audit is ordered by a Court Order or by a Government Agency with authority to do so without said notice. Notwithstanding the foregoing, in the event that TIPS is made aware of any pricing being offered to eligible entities that is materially inconsistent with Vendor's TIPS Pricing, TIPS shall have the ability to conduct the audit internally or may engage a third- party auditing firm to investigate any possible non-compliant conduct or may terminate the Agreement according to the terms of this Agreement. In the event of an audit, the requested materials shall be reasonably provided in the time, format, and at the location acceptable to TIPS. TIPS agrees not to perform a random audit the TIPS transaction documentation more than once per calendar year, but reserves the right to audit for just cause or as required by any governmental agency or court with regulatory authority over TIPS or the TIPS Member. These audit rights shall survive termination of this Agreement for a period of one (1) year from the effective date of termination.

25. Conflicts of Interest. The Parties confirm that they have not offered, given, or accepted, nor intend to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, service to the other in connection with this Agreement. Vendor affirms that, to the best of Vendor's knowledge, this Agreement has been arrived at independently, and is awarded without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this Agreement. Vendor agrees that it has disclosed any necessary affiliations with Region 8 Education Service Center and the TIPS Department, if any, through the Conflict of Interest attachment provided in the solicitation resulting in this Agreement.

26. Volume of TIPS Sales. Nothing in this Agreement or any TIPS communication may be construed as a guarantee that TIPS or TIPS Members will submit any TIPS orders to Vendor at any time.

27. Compliance with the Law. The Parties agree to comply fully with all applicable federal, state, and local statutes, ordinances, rules, and regulations applicable to their entity in connection with the programs contemplated under this Agreement.

28. Severability. If any term(s) or provision(s) of this Agreement are held by a court of competent jurisdiction to be invalid, void, or unenforceable, then such term(s) or provision(s) shall be deemed restated to reflect the original intention of the Parties as nearly as possible in accordance with applicable law and the remainder of this Agreement, and the remainder of the provisions of this Agreement shall remain in full force and effect and shall in no way be affected, impaired or invalidated, unless such holding causes the obligations of the Parties hereto to be impossible to perform or shall render the terms of this Agreement to be inconsistent with the intent of the Parties hereto.

29. Force Majeure. If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement through no fault of its own then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon. Upon delivering such notice, the obligation of the affected party, so far as it is affected by such Force Majeure as described, shall be suspended during the continuance of the inability then claimed but for no longer period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch. In the event that Vendor's obligations are suspended by reason of Force Majeure, all TIPS Sales accepted prior to the Force Majeure event shall be the legal responsibility of Vendor and the terms of the TIPS Sale Supplemental Agreement shall control Vendor's failure to fulfill for a Force Majeure event.

30. Immunity. Vendor agrees that nothing in this Agreement shall be construed as a waiver of sovereign or government immunity; nor constitute or be construed as a waiver of any of the privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department. The failure to enforce, or any delay in the enforcement of, any privileges, rights, defenses,

remedies, or immunities available to Region 8 Education Service Center or its TIPS Department under this Agreement or under applicable law shall not constitute a waiver of such privileges, rights, defenses, remedies, or immunities or be considered as a basis for estoppel.

31. **Insurance Requirements.** Vendor agrees to maintain the following minimum insurance requirements for the duration of this Agreement. All policies held by Vendor to adhere to this term shall be written by a carrier with a financial size category of VII and at least a rating of "A-" by A.M. Best Key Rating Guide. The coverages and limits are to be considered minimum requirements and in no way limit the liability of the Vendor(s). Any immunity available to TIPS or TIPS Members shall not be used as a defense by the contractor's insurance policy. Only deductibles applicable to property damage are acceptable, unless proof of retention funds to cover said deductibles is provided. "Claims made" policies will not be accepted. Vendor's required minimum coverage shall not be suspended, voided, cancelled, non-renewed or reduced in coverage or in limits unless replaced by a policy that provides the minimum required coverage except after thirty (30) days prior written notice by certified mail, return receipt requested has been given to TIPS or the TIPS Member if a project or pending delivery of an order is ongoing. Upon request, certified copies of all insurance policies shall be furnished to the TIPS or the TIPS Member. Vendor agrees that when Vendor or its subcontractors are liable for any damages or claims, Vendor's policy, shall be primary over any other valid and collectible insurance carried by the Member or TIPS.

General Liability:	$1,000,000 each Occurrence/Aggregate
Automobile Liability:	$300,000 Includes owned, hired & non-owned
Workers' Compensation:	Statutory limits for the jurisdiction in which the Vendor performs under this Agreement. If Vendor performs in multiple jurisdictions, Vendor shall maintain the statutory limits for the jurisdiction with the greatest dollar policy limit requirement.
Umbrella Liability:	$1,000,000 each Occurrence/Aggregate

32. **Waiver.** No waiver of any single breach or multiple breaches of any provision of this Agreement shall be construed to be a waiver of any breach of any other provision. No delay in acting regarding any breach of any provision shall be construed to be a waiver of such breach.

33. **Binding Agreement.** This Agreement shall be binding and inure to the benefit of the Parties hereto and their respective heirs, legal successors, and assigns.

34. **Headings.** The paragraph headings contained in this Agreement are included solely for convenience of reference and shall not in any way affect the meaning or interpretation of any of the provisions of this Agreement.

35. **Choice of Law and Venue.** This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of Texas. Any proceeding, claim, action, or alternative dispute resolution arising out of or relating to this Agreement or involving TIPS shall be brought in a State Court of competent jurisdiction in Camp County, Texas, or if Federal Court is legally required, a Federal Court of competent jurisdiction in the Eastern District of Texas, and each of the Parties irrevocably submits to the exclusive jurisdiction of said court in any such proceeding, waives any objection it may now or hereafter have to venue or to convenience of forum, agrees that all claims in respect of the proceeding shall be heard and determined only in any such court, and agrees not to bring any proceeding arising out of or relating to this procurement process or any contract resulting from or and contemplated transaction in any other court. The Parties agree that either or both of them may file a copy of this paragraph with any court as written evidence of the knowing, voluntary and freely bargained for agreement between the Parties irrevocably to waive any objections to venue or to convenience of forum.

36. **Relationship of the Parties.** Nothing contained in this Agreement shall be construed to make one Party an agent of the other Party nor shall either party have any authority to bind the other in any respect, unless expressly authorized by the other party in writing. The Parties are independent contractors and nothing in this Agreement creates a relationship of employment, trust, agency or partnership between them.

37. **Assignment.** No assignment of this Agreement or of any duty or obligation of performance hereunder, shall be made in whole or in part by a Party hereto without the prior written consent of the other Party. Written consent of TIPS shall not be unreasonably withheld.

38. **Minimum Condition and Warranty Requirements for TIPS Sales.** All goods quoted or sold through a TIPS Sale shall be new unless clearly stated otherwise in writing. All new goods and services shall include the applicable manufacturers minimum standard warranty unless otherwise agreed to in the Supplemental Agreement.

39. **Minimum Customer Support Requirements for TIPS Sales.** Vendor shall provide timely and commercially reasonable support for TIPS Sales or as agreed to in the applicable Supplemental Agreement.

40. **Minimum Shipping Requirements for TIPS Sales.** Vendor shall ship, deliver, or provide ordered goods and services within a commercially reasonable time after acceptance of the order. If a delay in delivery is anticipated, Vendor shall notify the TIPS Member as to why delivery is delayed and provide an updated estimated time for completion. The TIPS Member may cancel the order if the delay is not commercially acceptable or not consistent with the Supplemental Agreement applicable to the order.

41. **Minimum Vendor License Requirements.** Vendor shall maintain, in current status, all federal, state, and local licenses, bonds and permits required for the operation of the business conducted by Vendor. Vendor shall remain fully informed of and in compliance with all ordinances and regulations pertaining to the lawful provision of goods or services under the TIPS Agreement. TIPS and TIPS Members reserve the right to stop work and/or cancel a TIPS Sale or terminate this or any TIPS Sale Supplemental Agreement involving Vendor if Vendor's license(s) required to perform under this Agreement or under the specific TIPS Sale have expired, lapsed, are suspended or terminated subject to a 30-day cure period unless prohibited by applicable statue or regulation.

42. **Minimum Vendor Legal Requirements.** Vendor shall remain aware of and comply with this Agreement and all local, state, and federal laws governing the sale of products/services offered by Vendor under this contract. Such applicable laws, ordinances, and policies must be complied with even if not specified herein.

43. **Minimum Site Requirements for TIPS Sales (*when applicable to TIPS Sale*).**

Cleanup: When performing work on site at a TIPS Member's property, Vendor shall clean up and remove all debris and rubbish resulting from their work as required or directed by the TIPS Member or as agreed by the parties. Upon completion of work, the premises shall be left in good repair and an orderly, neat, clean and unobstructed condition.

Preparation: Vendor shall not begin a project for which a TIPS Member has not prepared the site, unless Vendor does the preparation work at no cost, or until TIPS Member includes the cost of site preparation in the TIPS Sale Site preparation includes, but is not limited to: moving furniture, installing wiring for networks or power, and similar pre-installation requirements.

Registered Sex Offender Restrictions: For work to be performed at schools, Vendor agrees that no employee of Vendor or a subcontractor who has been adjudicated to be a registered sex offender will perform work at any time when students are, or reasonably expected to be, present unless otherwise agreed by the TIPS Member. Vendor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the TIPS Sale at the TIPS Member's discretion. Vendor must identify any additional costs associated with compliance of this term. If no costs are specified, compliance with this term will be provided at no additional charge.

Safety Measures: Vendor shall take all reasonable precautions for the safety of employees on the worksite, and shall erect and properly maintain all necessary safeguards for protection of workers and the public. Vendor shall post warning signs against all hazards created by the operation and work in progress. Proper precautions shall be taken pursuant to state law and standard practices to protect workers, general public and existing structures from injury or damage.

Smoking: Persons working under Agreement shall adhere to the TIPS Member's or local smoking statutes, codes, ordinances, and policies.

44. **Payment for TIPS Sales.** TIPS Members may make payments for TIPS Sales directly to Vendor, Vendor's Authorized Reseller, or as otherwise agreed to in the applicable Supplemental Agreement after receipt of the invoice and in compliance with applicable payment statutes. Regardless of how payment is issued or received for a TIPS Sale, Vendor is responsible for all reporting and TIPS Administration Fee payment requirements as stated herein.

45. **Marketing.** Vendor agrees that any logos, images, photos, writing, audio, clip art, music, data, promotional documents, or any other information or intellectual property ("Vendor Property") approved or provided by Vendor for TIPS' use are either the exclusive property of Vendor, or Vendor has all necessary rights, license, and permissions to allow TIPS use of Vendor Property. Vendor permits TIPS to use their name and logo to identify Vendor as a TIPS Awarded Vendor on the TIPS website only. All other use of Vendor's Property by TIPS shall require prior written Vendor approval. Any Vendor use of TIPS' logos, images, photos, writing, audio, clip art, music, data, promotional documents, or any other information or intellectual property ("TIPS Property") or reference to TIPS in marketing outreach requires Vendor to obtain prior written authorization from marketing@tips-usa.com which will not be unreasonably withheld. Vendor must execute a TIPS Marketing Waiver before specific, written authorization will be granted. For any marketing

outreach taken by Vendor without proper TIPS' authorization and execution of the TIPS Marketing Waiver, **Vendor shall indemnify and hold harmless TIPS and its employees, officers, agents, representatives, contractors, assignees, designees, and TIPS Members from any and all claims, damages, and judgments involving:**

i. **Infringement of patent, copyright, trade secrets, trade or services marks, and any other intellectual or intangible property rights and/or claims arising from the Vendor's (including Vendor's officers', employees', agents', authorized resellers', subcontractors', or invitees') unauthorized use or distribution of Vendor Property.**
ii. **Violations of privacy and data laws; and**
iii. **Unauthorized use or distribution of TIPS Property.**

46. **Tax Exempt Status of TIPS Members.** Most TIPS Members are tax exempt entities and the laws and regulations applicable to the specific TIPS Member customer shall control.

47. **Automatic Renewal Limitation for TIPS Sales.** No TIPS Sale may incorporate an automatic renewal clause that exceeds month to month terms with which the TIPS Member must comply. All renewal terms incorporated into a TIPS Sale Supplemental Agreement shall only be valid and enforceable when Vendor received written confirmation of acceptance of the renewal term from the TIPS Member for the specific renewal term. The purpose of this clause is to avoid a TIPS Member inadvertently renewing an Agreement during a period in which the governing body of the TIPS Member has not properly appropriated and budgeted the funds to satisfy the Agreement renewal. Any TIPS Sale Supplemental Agreement containing an "Automatic Renewal" clause that conflicts with these terms is rendered void and unenforceable.

48. **Choice of Law Limitation for TIPS Sales.** Vendor agrees that if any "Choice of Law" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Choice of Law" applicable to the TIPS Sale agreement/contract between Vendor and TIPS Member shall be the state where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Choice of Law" clause that conflicts with these terms is rendered void and unenforceable.

49. **Venue Limitation for TIPS Sales.** Vendor agrees that if any "Venue" provision is included in any TIPS Sale Agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Venue" for any litigation or alternative dispute resolution shall be in the state and county where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Venue" clause that conflicts with these terms is rendered void and unenforceable.

50. **Indemnity Limitation for TIPS Sales.** Texas and other jurisdictions restrict the ability of governmental entities to indemnify others. Vendor agrees that if any "Indemnity" provision which requires the TIPS Member to indemnify Vendor is included in any TIPS sales agreement/contract between Vendor and a TIPS Member, that clause must either be stricken or qualified by including that such indemnity is only permitted, "to the extent permitted by the laws and constitution of [TIPS Member's State]" unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing an "Indemnity" clause that conflicts with these terms is rendered void and unenforceable.

51. **Arbitration Limitation for TIPS Sales.** Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause may not require that the arbitration is mandatory or binding. Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause provides for only voluntary and non-binding arbitration unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Arbitration" clause that conflicts with these terms is rendered void and unenforceable.

In Witness Whereof, the parties hereto, each acting under due and proper authority, have signed this Agreement.

TIPS VENDOR AGREEMENT SIGNATURE FORM

TIPS 250502 Elevators and Servicing (Part 1)

Vendor Name: United Elevator Services, LLC

Vendor Address: PO Box 1308

City: Knoxville State: TN Zip Code: 37901

Vendor Authorized Signatory Name: Shawn Lyness

Vendor Authorized Signatory Title: Sales Manager

Vendor Authorized Signatory Phone: 865-223-3909

Vendor Authorized Signatory Email: shawnl@unitedelevator.com

Vendor Authorized Signature: Shawn Lyness Date: 6-13-2025

(*The following is for TIPS completion only*)

TIPS Authorized Signatory Name: Dr. Fitts

TIPS Authorized Signatory Title: Executive Director

TIPS Authorized Signature: David Wayne Fitts Date: 07/21/2025



250502
United Elevator Services
Supplier Response

Event Information

Number: 250502
Title: Elevators and Servicing (2 PART with JOC)
Type: Request for Proposal
Issue Date: 5/1/2025
Deadline: 6/20/2025 03:00 PM (CT)
Notes: This is a solicitation issued by The Interlocal Purchasing System (TIPS), a department of Texas Region 8 Education Service Center. It is an Indefinite Delivery, Indefinite Quantity ("IDIQ") solicitation. It will result in contracts that provide, through adoption/"piggyback" an indefinite quantity of supplies/services, during a fixed period of time, to TIPS public entity and qualifying non-profit "TIPS Members" throughout the nation. Thus, there is no specific project or scope of work to review. Rather this solicitation is issued as a prospective award for utilization when any TIPS Member needs the goods or services offered during the life of the agreement.

This is a two part solicitation. Part 1 is solicited for TIPS sales that are not considered a "public work" construction project. Part 1 permits the sale of goods and non-construction/non-"public work" services such as maintenance and minor repairs. Part 2 Job Order Contract (JOC) is solicited for projects considered by your TIPS Member Customers to be a "public work" construction project. The determination of whether or not a TIPS sale amounts to a "public work" construction project requiring a Part 2 JOC contract is made by the TIPS Member Customer at the time of each TIPS sale. Thus, Vendors are encouraged to respond to both Parts 1 and 2 in case your TIPS Member Customers require that a sale be made under one Part or the other. However, responding to both Parts is not required.

IF YOU CURRENTLY HOLD TIPS CONTRACT 220502 ELEVATORS PART 1, PART 2, OR BOTH ("220502"), YOU MUST RESPOND TO THIS SOLICITATION TO PREVENT LAPSE OF CONTRACT UNLESS YOU HOLD ANOTHER CURRENT TIPS CONTRACT THAT COVERS ALL OF YOUR ELEVATOR OFFERINGS. THIS AWARDED CONTRACT WILL REPLACE YOUR EXPIRING TIPS CONTRACT 220502. IF YOU HOLD ANOTHER TIPS CONTRACT OTHER THAN 220502 WHICH COVERS ALL OF YOUR ELEVATOR OFFERINGS AND YOU ARE SATISFIED WITH IT, THERE IS NO NEED TO RESPOND TO THIS SOLICITATION UNLESS YOU PREFER TO HOLD BOTH CONTRACTS.

Contact Information

Address: Region 8 Education Service Center
4845 US Highway 271 North
Pittsburg, TX 75686
Phone: +1 (866) 839-8477
Email: bids@tips-usa.com

United Elevator Services Information

Address: 4835 Airport Highway
Knoxville, TN 37920
Phone: (865) 573-0731
Toll Free: (800) 338-0064
Web Address: unitedelevator.com

By submitting your response, you certify that you are authorized to represent and bind your company.

Shawn Lyness
Signature

shawnl@unitedelevator.com
Email

Submitted at 6/18/2025 02:32:51 PM (CT)

Supplier Note

Please contact me directly if you have any questions. Shawn Lyness 865-223-3909

Requested Attachments

Vendor Agreement (Part 1)

250502 Vendor Agreement (Part 1).pdf

If responding to Part 1, the Vendor Agreement must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, Vendor Name placed in the line provided at the top, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 1), Vendor may assert so in the Attribute Questions and those shall be addressed during evaluation.

Vendor Agreement Signature Form (Part 1)

250502 Vendor Agreement Signature Form (Part 1) SIGNED.pdf

If responding to Part 1 the Vendor Agreement Signature Form (Part 1) must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 1), Vendor may leave the signature line of this page blank and assert so in the Attribute Questions and those shall be addressed during evaluation.

Pricing Form 1 (Part 1)

250502 Pricing Form 1 (Part 1) FILLED OUT.xlsx

If responding to Part 1, Pricing Form 1 (Part 1) must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed as instructed, and uploaded to this location.

Pricing Form 2 (Part 1)

Copy of 250502 Pricing Form 2 (Part 1) FILLED OUT.xlsx

If responding to Part 1, Pricing Form 2 (Part 1) must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed as instructed, and uploaded to this location.

Required Confidentiality Claim Form

250502 Required Confidentiality Claim Form SIGNED.pdf

The Required Confidentiality Claim Form must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. This is the only way for Vendor to assert confidentiality of any information submitted.

(3) Required Customer Reference Letters

TIPS Ref Letter.pdf

Whether responding to Part 1, Part 2, or both. Vendor is required to upload three Customer Reference Letters from three separate customers as described herein. Vendor will be scored on the aggregate Reference Letters received from customers as described in the solicitation. Vendor must provide three current letters (issued within the 12 months preceding the date on which the solicitation was posted) from its customers verifying Vendor's customer service and reputation as described herein. (Ex. if the solicitation/bid posted on February 4, 2024, the letters must be dated on or after February 1, 2023). The letters must be issued from customers who have received goods or services from the Vendor or its current corporate officials, on entity/company letterhead, must specify its customer experience with Vendor, and must be signed by an authorized representative of the customer. TIPS Reference Forms from past bids will no longer be accepted.

Alternate or Supplemental Pricing Documents (Part 1)

No response

Optional. If responding to Part 1, when completing Pricing Form 1 (Part 1) & Pricing Form 2 (Part 1), you direct TIPS to view additional, alternate, or supplemental pricing documentation, you may upload that Part 1 documentation.

Current Form W-9

2025 W-9.pdf

Vendor must upload their current IRS Tax Form W-9. The legal name, EIN, and d/b/a's listed should match the information provided herein exactly. This form will be utilized by TIPS to properly identify your entity.

Vendor Agreement (Part 2)

250502 Vendor Agreement (Part 2).pdf

If responding to Part 2, the Vendor Agreement (Part 2) must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 2), Vendor may assert so in the Attribute Questions and those shall be addressed during evaluation.

Vendor Agreement Signature Form (Part 2)

250502 Vendor Agreement Signature Form (Part 2) SIGNED.pdf

If responding to Part 2, the Vendor Agreement Signature Form (Part 2) must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 2), Vendor may leave the signature line of this page blank and assert so in the Attribute Questions and those shall be addressed during evaluation.

Part 2 Required Bonding Capacity Letter

2025 0616 United Elevator Ref Ltr.pdf

If proposing on Part 2, Vendor is required to upload a Bonding Capacity Letter from its surety, as described herein, at this location. Please see the attachment entitled "Instructions and Sample - Part 2 Required Bonding Capacity Letter" for complete instructions. . On Part 2, Vendor will be scored on the aggregate bonding capacity displayed in the accepted letter. Vendor must provide a current letter (issued on or after the first day of the month preceding the date on which the solicitation was posted) from its surety verifying Vendor's bonding capacity as described herein. (Ex. if the solicitation/bid posted on February 4, 2022, the letter must be dated on or after January 1 2022. The letter must be issued from Vendor's Surety companies, on surety company letterhead, must specify the maximum bonding capacity of the Vendor, and must be signed by an authorized representative of the surety company. The issuing surety must be authorized to do business in the State of Texas and must be listed on the Department of the Treasury's Listing of Approved Sureties (Department Circular 570).

Supplemental Vendor Information (Supplemental Vendor Information Only)

No response

Optional. If Vendor would like to display or include any brochures, promotional documents, marketing materials, or other Vendor Information for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Certificates & Licenses (Supplemental Vendor Information Only)

No response

Optional. If Vendor would like to display any applicable certificates or licenses (including HUB certificates) for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor's Warranties, Terms, and Conditions (Supplemental Vendor Information Only) *No response*

Optional. If Vendor would like to display any standard warranties, terms, or conditions which are often applicable to their offerings for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor Logo (Supplemental Vendor Information Only) 2009 logo.bmp

Optional. If Vendor desires that their logo be displayed on their public TIPS profile for TIPS and TIPS Member viewing, Vendor may upload that logo at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Disclosure of Lobbying Activities - Standard Form - LLL *No response*

Do not upload this form unless Vendor has reportable lobbying activities. There are Attributes entitled, "2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Disclosure of Lobbying Activities – Standard Form - LLL must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location.

Conflict of Interest Questionnaire - Form CIQ *No response*

Do not upload this form unless you have a reportable conflict with TIPS. There is an Attribute entitled "Conflict of Interest Questionnaire Requirement" immediately followed by an Attribute entitled "Conflict of Interest Questionnaire Requirement – Form CIQ – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Conflict of Interest Questionnaire – Form CIQ must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded at this location.

Bid Attributes

1	**Disadvantaged/Minority/Women Business & Federal HUBZone** Some participating public entities are required to seek Disadvantaged/Minority/Women Business & Federal HUBZone ("D/M/WBE/Federal HUBZone") vendors. Does Vendor certify that their entity is a D/M/WBE/Federal HUBZone vendor? If you respond "Yes," you must upload current certification proof in the appropriate "Response Attachments" location. NO
2	**Historically Underutilized Business (HUB)** Some participating public entities are required to seek Historically Underutilized Business (HUB) vendors as defined by the Texas Comptroller of Public Accounts Statewide HUB Program. Does Vendor certify that their entity is a HUB vendor? If you respond "Yes," you must upload current certification proof in the appropriate "Response Attachments" location. No
3	**National Coverage** Can the Vendor provide its proposed goods and services to all 50 US States? No

4 States Served

If Vendor answered "No" to the question entitled "National Coverage," please list all states where vendor can provide the goods and services proposed directly below. Your response may dictate which potential TIPS Member customers consider purchasing your offerings.

Entire state of Tennessee with select coverage areas in Kentucky, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Alabama, and Mississippi.

5 Description of Vendor Entity and Vendor's Goods & Services

If awarded, this description of Vendor and Vendor's goods and services will appear on the TIPS website for customer/public viewing.

In business since 1958, United Elevator Services, LLC is an independent family owned, non-union, full-service company. We offer new installations, preventative maintenance control plans, modernizations, and repairs on elevators and accessibility equipment (residential and commercial).

6 Primary Contact Name

Please identify the individual who will be primarily responsible for all TIPS matters and inquiries for the duration of the contract.

Shawn Lyness

7 Primary Contact Title

Primary Contact Title

Sales Manager

8 Primary Contact Email

Please enter a valid email address that will definitely reach the Primary Contact.

shawnl@unitedelevator.com

9 Primary Contact Phone

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

Please provide the accurate and current phone number where the individual who will be primarily responsible for all TIPS matters and inquiries for the duration of the contract can be reached directly.

8655730731

10 Primary Contact Fax

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

11 Primary Contact Mobile

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652233909

12 Secondary Contact Name

Please identify the individual who will be secondarily responsible for all TIPS matters and inquiries for the duration of the contract.

Taylor Sawyer

13 **Secondary Contact Title**

Secondary Contact Title

Executive

14 **Secondary Contact Email**

Please enter a valid email address that will definitely reach the Secondary Contact.

taylors@unitedelevator.com

15 **Secondary Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

Please provide the accurate and current phone number where the individual who will be secondarily responsible for all TIPS matters and inquiries for the duration of the contract can be reached directly.

8655730731

16 **Secondary Contact Fax**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

17 **Secondary Contact Mobile**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652097775

18 **Administration Fee Contact Name**

Please identify the individual who will be responsible for all payment, accounting, and other matters related to Vendor's TIPS Administration Fee due to TIPS for the duration of the contract.

Shawn Lyness

19 **Administration Fee Contact Email**

Please enter a valid email address that will definitely reach the Administration Fee Contact.

shawnl@unitedelevator.com

20 **Administration Fee Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652233909

21 **Purchase Order and Sales Contact Name**

Please identify the individual who will be responsible for receiving and processing purchase orders and sales under the TIPS Contract.

Shawn Lyness

22 **Purchase Order and Sales Contact Email**

Please enter a valid email address that will definitely reach the Purchase Order and Sales Contact.

shawnl@unitedelevator.com

23 **Purchase Order and Sales Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652233909

24 **Company Website**

Company Website (Format - www.company.com)

unitedelevator.com

25 **Entity D/B/A's and Assumed Names**

You must confirm that you are responding to this solicitation under your legal entity name. Go now to your Supplier Profile in this eBid System and confirm that your profile reflects your "Legal Name" as it is listed on your W9.

In this question, please identify all of your entity's assumed names and D/B/A's. Please note that you will be identified publicly by the Legal Name under which you respond to this solicitation unless you organize otherwise with TIPS after award.

No response

26 **Primary Address**

Primary Address

4835 Airport Highway

27 **Primary Address City**

Primary Address City

Knoxville

28 **Primary Address State**

Primary Address State (2 Digit Abbreviation)

TN

29 **Primary Address Zip**

Primary Address Zip

37920

30 **Search Words Identifying Vendor**

Please list all search words and phrases to be included in the TIPS database related to your entity. ***Do not*** list words which are not associated with the bid category/scope (See bid title for general scope). This will help users find you through the TIPS website search function. You may include product names, manufacturers, specialized services, and other words associated with the scope of this solicitation.

Elevator, Elevators, Elevator Maintenance, Elevator Service, Elevator Repair, Elevator Installation, Elevator Upgrade, Elevator Modernization, Accessibility Lift, Accessibility Lifts, Accessibility Lift Maintenance, Accessibility Lift Service, Accessibility Lift Repair, Accessibility Lift Installation, New Construction, Modernization

31 **Certification of Vendor Residency (Required by the State of Texas)**

Does Vendor's parent company or majority owner:

(A) have its principal place of business in Texas; ***or*** (B) employ at least 500 persons in Texas?

Texas Education Code Section 44.031 requires that this information be considered in evaluation for certain contracts. However, Vendor response does not affect points, scoring, or potential award.

No

32 **Vendor's Principal Place of Business (City)**

In what city is Vendor's principal place of business located?

Knoxville, Tennessee

33 **Vendor's Principal Place of Business (State)**

In what state is Vendor's principal place of business located?

Tennessee

34 **Vendor's Years in Business**

How many years has the business submitting this proposal been operating in its current capacity and field of work?

67

35 **Certification Regarding Entire TIPS Agreement for Part 1 and Part 2 Contracts**

This is a two part solicitation. Part 1 is solicited for TIPS sales that are not considered a "public work" construction project. Part 1 permits the sale of goods and non-construction/non-"public work" services such as maintenance and minor repairs. Part 2 Job Order Contract (JOC) is solicited for projects considered by your TIPS Member Customers to be a "public work" construction project. The determination of whether or not a TIPS sale amounts to a "public work" construction project requiring a Part 2 JOC contract is made by the TIPS Member Customer at the time of each TIPS sale. Thus, Vendors are encouraged to respond to both Parts 1 and 2 in case your TIPS Member Customers require that a sale be made under one Part or the other. However, responding to both Parts is not required. If Vendor responds and is awarded to both Parts, Vendor will have one contract for Part 1 and a separate contract for Part 2.

Vendor agrees that, if awarded, Vendor's final TIPS Contract(s), for either Part 1, Part 2, or both Parts, will consist of the provisions set forth in the corresponding finalized TIPS Vendor Agreement, Vendor's responses to these attribute questions, and: (1) The TIPS solicitation document resulting in the Agreement; (2) Any addenda or clarifications issued in relation to the corresponding TIPS solicitation; (3) All solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor’s entire proposal response to the corresponding TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, accepted pricing, accepted responses to questions, and accepted written clarifications of Vendor’s proposal, and; any properly included attachments to the TIPS Contract.

Does Vendor agree?

Yes, Vendor agrees

36 **Minimum Percentage Discount Offered to TIPS Members on all Part 1 Goods and Services (READ CAREFULLY)**

Please read thoroughly and carefully as an error on your response can render your Part 1 contract award unusable. If you are not proposing on Part 1, you must still respond to proceed but it will not apply to you unless you decide to propose and are awarded on Part 1.

TIPS Members often turn to TIPS Contracts for ease of use and to receive discounted pricing.

If awarded on Part 1, what is the minimum percentage discount that you can offer TIPS Members off of all Part 1 goods and service pricing (whether offered through Pricing Form 1, Pricing Form 2, or in another accepted format) that you offer? Only limited goods/services specifically identified and excluded from this discount in Vendor's original proposal may be excluded from this discount.

Vendor must respond with a percentage from 0%-100%. The percentage discount that you input below will be applied to your Part 1 "Catalog Pricing", as defined in the solicitation, for all TIPS Sales made during the life of the contract. You cannot alter this percentage discount once the solicitation legally closes. You will always be required to discount every TIPS Sale by the percentage included below with the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal. If you add goods or services to your "Catalog Pricing" during the life of the contract, you will be required to sell those new items with this discount applied.

Example: In this example, you enter a 10% minimum percentage discount below. In year-one of your TIPS Contract, your published Part 1 "Catalog Pricing" (website/store/published pricing) for "Material A" is $100 and for "Material A Maintenance Service" is $100. In this example, you must sell those items under the Part 1 TIPS Contract at the proposed 10% discounted price of: "Material A" - $90, "Material A Maintenance Service" - $90. In year two of your TIPS Contract, you update your Part 1 "Catalog Pricing" with the market. You add "Material B" to your "Catalog Pricing" for $200 and have increased the price of "Material A" to $110 and the price of "Material A Maintenance Service" to $110. In this example, after the Part 1 "Catalog Pricing" update, you must still sell those items under the Part 1 TIPS Contract at the proposed 10% discounted price of: "Material A" - $99, "Material A Maintenance Service" - $99, and "Material B" - $180.00.

With the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal, if you cannot honor the discount on all Part 1 goods and items now included or which may be added in the future with certainty, then you should offer a lesser discount percentage below.

If awarded on Part 1, what is the minimum percentage discount that you can offer TIPS Members off of all Part 1 goods and service pricing (whether offered through Pricing Form 1, Pricing Form 2, or in another accepted format) that you offer?

0%

37 **Honoring Vendor's Part 1 Minimum Percentage Discount**

Vendor is asked in these Attribute Questions to provide a Minimum Percentage Discount offered to TIPS Members on all Part 1 goods and services sold under the TIPS Contract. If proposing on Part 1, points will be assigned for your response and scoring of your Part 1 proposal will be affected. On your Part 1 evaluation, a "YES" answer will be awarded the maximum 10 points and a "NO" answer will be awarded 0 points. If you are not proposing on Part 1, you must still answer to proceed but this term will not apply to you or affect your scoring unless you decide to propose and are awarded on Part 1.

If awarded on Part 1, does Vendor agree to honor the Minimum Percentage Discount off of their TIPS "Catalog Pricing" that Vendor proposed for all TIPS Sales made for the duration of the TIPS Contract?

Yes, Vendor agrees

38 **Volume and Additional Discounts**

In addition to the Part 1 Minimum Percentage Discount proposed herein, does Vendor ever expect and intend to offer additional, greater, or volume discounts to TIPS Members?

If proposing on Part 1, point(s) may be assigned for your response in the Part 1 category of "Pricing" during scoring and evaluation. If you are not proposing on Part 1, you must respond to proceed but no points will be assigned for your response.

Yes

39 **Part 1 "Catalog Pricing" and Pricing Requirements**

This is a requirement of the Part 1 TIPS Contract and is non-negotiable. If you are not proposing on Part 1, you must still agree to proceed but it will not apply to you unless you decide to propose and are awarded on Part 1.

In this solicitation and resulting contract, Part 1 "Catalog Pricing" shall be defined as:

"The then available list of goods or services, in the most current listing regardless of date, that takes the form of a catalog, price list, price schedule, shelf-price or other viewable format that:

A. is regularly maintained by the manufacturer or Vendor of an item; and

B. is either published or otherwise available for review by TIPS or a customer during the purchase process;

C. to which the Minimum Percentage Discount proposed by the proposing Vendor may be applied.

If awarded on Part 1 of this TIPS Contract, for the duration of the contract, Vendor agrees to provide, upon request, their then current "Catalog Pricing." Or, in limited circumstances where Vendor has proposed the Percentage Mark-Up method of pricing in this proposal, proof of Vendor's "cost" may be accepted by TIPS in place of catalog pricing.

YES

40 **REQUIRED FOR PART 2 - Vendor's Regular Hours RS Means Coefficient**

What is Vendor's Regular Hours RS Means Coefficient? **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

The RS Means Price Book is a unit price book adjusted for different geographic areas by using the City Cost Index for each location. You may visit https://www.rsmeans.com for more information.

You must review the TIPS Part 2 RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab prior to responding herein.

To propose the RS Means Price Book pricing exactly, Vendor would insert a 1.0 as their Regular Hours RS Means Coefficient below, to propose a 5% discount off of the RS Means Price Book Vendor would insert a .95 as their Regular Hours RS Means Coefficient below. To see the full scoring rubric and use TIPS scoring calculator, please view the TIPS RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab.

Insert Vendor's Regular Hours RS Means Coefficient below. **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

1.05

41 **REQUIRED FOR PART 2 - Vendor's After-Hours RS Means Coefficient**

What is Vendor's After-Hours RS Means Coefficient? **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

The RS Means Price Book is a unit price book adjusted for different geographic areas by using the City Cost Index for each location. You may visit https://www.rsmeans.com for more information.

You must review the TIPS Part 2 RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab prior to responding herein.

The most common After-Hours RS Means Coefficient is "time-and-a-half" of the standard RS Means Unit Price Book. For example, if Vendor's Regular Hours Coefficient above is .95, Vendor would assert an After-Hours RS Means Coefficient of 1.45 for "time-and-a-half" pricing. To see the full scoring rubric and use TIPS scoring calculator, please view the TIPS RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab.

Insert Vendor's After-Hours RS Means Coefficient below. **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

1.55

42 **REQUIRED FOR PART 2 - Vendor's Percentage Markup of Items not Pre-Priced within the RS Means Price Book**

Here, Vendor must enter a percentage, not a coefficient. **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

If Vendor sells items which cannot be found in the RS Means Price Book, at what Percentage Markup does Vendor agree to sell those Non Pre-Priced items? This is a maximum Percentage Markup and Vendor may always offer customers a lesser markup.

Example: In this example, Vendor is selling a project to a TIPS Member school district and some of the contract pricing for special materials cannot be verified because it cannot be found in the RS Means Price book. Vendor may sell those specialty items to the Member this percentage markup from cost. In this example, if one of the specialty items cost Vendor $100 from the manufacturer and Vendor proposed a Percentage Markup of 30% here, then Vendor could sell the item to the TIPS Customer for $130.00 or less in this example.

Vendor must provide TIPS with manufacturer documentation reflecting the cost of any non pre-priced item at the time of the TIPS sale so that TIPS can verify that the proposed percentage markup is being honored.

What is Vendor's Percentage Markup of items not Pre-Priced within the RS Means Price Book? **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

35%

43

REQUIRED FOR PART 2 - TIPS Pricing and Line Item Estimate Pricing Requirements

This is a requirement of the Part 2 TIPS Contract and is non-negotiable. If you are not proposing on Part 2, you must still agree to proceed but it will not apply to you unless you decide to propose and are awarded on Part 2.

Vendor must respond to the required pricing attributes above seeking RS Means coefficients and a percentage markup if seeking to propose on Part 2.

If awarded on Part 2 of this TIPS Contract, for the duration of the contract, Vendor agrees to provide a RS Means line-item estimate to TIPS for each anticipated Part 2 TIPS project or sale. Or, in limited circumstances in contracts where Xactimate pricing is also expressly permitted and Vendor also submits Xactimate pricing under Part 2, Vendor may instead provide an Xactimate line-item estimate to TIPS. However, Vendor agrees that when a TIPS Member Customer seeks a quote for a Part 2 TIPS sale, Vendor will always supply a line-item estimate to TIPS for review and approval.

Yes, Vendor agrees

44

EXCEPTIONS & DEVIATIONS TO TIPS STANDARD TERMS AND CONDITIONS

Vendor agrees that, if awarded, Vendor's final TIPS Part 1 and/or Part 2 Contract will consist of the provisions set forth in the finalized TIPS Vendor Agreement, Vendor's responses to these attribute questions, and: (1) The corresponding TIPS solicitation document resulting in this Agreement; (2) Any addenda or clarifications issued in relation to the corresponding TIPS solicitation; (3) All solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor’s entire proposal response to the corresponding TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, accepted pricing, accepted responses to questions, and accepted written clarifications of Vendor’s proposal, and; any properly included attachments to the TIPS Contract. In the event of conflict between the terms of the finalized Vendor Agreement and one of the incorporated documents the terms and conditions which are in the best interest of governmental/qualifying non-profit TIPS Members shall control at TIPS sole discretion.

If Vendor responds, "No, Vendor does not agree" to this Attribute, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration. This is the only proper way to submit proposed deviations for TIPS consideration. TIPS reserves the right to accept, decline, or modify Vendor's requested negotiated terms. For this reason, answering "No, Vendor does not agree" may ultimately delay or prevent award.

Does Vendor agree with TIPS standard terms and conditions as presented in the TIPS solicitation document (RFP, RCSP, RFQ, or other) and the TIPS Vendor Agreement document?

Yes, Vendor agrees

45	**TIPS Sales Reporting Requirements** **This is a requirement of the TIPS Contract and is non-negotiable.** By submitting this proposal, Vendor certifies that Vendor will properly report all TIPS sales. With the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the purchase order or similar purchase document (with Vendor's Name, as known to TIPS, and the TIPS Contract Name and Number included) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion.
46	**TIPS Administration Fee Requirement and Acknowledgment** **This is a requirement of the TIPS Contract and is non-negotiable.** The collection of fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The TIPS Administration Fee is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of each TIPS Sale legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published in the corresponding RFP or RCSP document. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. By submitting a proposal, Vendor agrees that it has read, understands, and agrees to the published TIPS Administration Fee amount, calculation, and payment requirements. By submitting a proposal Vendor further confirms that all TIPS Pricing includes the TIPS Administration Fee and Vendor will not show adding the TIPS Administration Fee as a charge or line-item in any TIPS Sale.
47	**TIPS Member Access to Vendor Proposal & Documentation** **This is a requirement of the TIPS Contract and is non-negotiable.** Notwithstanding any other information provided in this solicitation or Vendor designation of certain documentation as confidential or proprietary, Vendor's submission of this proposal constitutes Vendor's express consent to the disclosure of Vendor's comprehensive proposal, including any information deemed confidential or proprietary, **to TIPS Members**. The proposing Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation to TIPS Members or by TIPS Members. By submitting this proposal, Vendor certifies the foregoing.

48	**Non-Collusive Bidding Certificate** **This is a requirement of the TIPS Contract and is non-negotiable.** By submission of this proposal, the Vendor certifies that: 1) This proposal has been independently arrived at without collusion with any other entity, bidder, or with any competitor; 2) This proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other bidder, competitor or potential competitor: 3) No attempt has been or will be made to induce any other person, partnership or corporation to modify, submit, or not to submit a bid or proposal; and 4) The person signing this bid or proposal certifies that they are duly authorized to execute this proposal/contract on behalf of Vendor and they have fully informed themselves regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the bidder as well as to the person signing in its behalf;
49	**Antitrust Certification Statements (Tex. Government Code § 2155.005)** **This is a requirement of the TIPS Contract and is non-negotiable.** By submission of this bid or proposal, Vendor certifies under penalty of perjury of the laws of the State of Texas that: (1) I am duly authorized to execute this proposal/contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Vendor) identified herein; (2) In connection with this proposal, neither I nor any representative of Vendor has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15; (3) In connection with this proposal, neither I nor any representative of the Vendor has violated any federal antitrust law; (4) Neither I nor any representative of Vendor has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.
50	**Limitation on Out-of-State Litigation - Texas Business and Commerce Code § 272** **This is a requirement of the TIPS Contract and is non-negotiable.** Texas Business and Commerce Code § 272 prohibits a construction contract, or an agreement collateral to or affecting the construction contract, from containing a provision making the contract or agreement, or any conflict arising under the contract or agreement, subject to another state's law, litigation in the courts of another state, or arbitration in another state. If included in Texas construction contracts, such provisions are voidable by a party obligated by the contract or agreement to perform the work. By submission of this proposal, Vendor acknowledges this law and ***if Vendor enters into a construction contract with a Texas TIPS Member*** under this procurement, Vendor certifies compliance.

51 **Required Confidentiality Claim Form**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS provides the required TIPS Confidentiality Claim Form in the "Attachments" section of this solicitation. Vendor must execute this form by either signing and waiving any confidentiality claim, or designating portions of Vendor's proposal confidential. If Vendor considers any portion of Vendor's proposal to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form.
If TIPS receives a public information act or similar request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor documents deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law, including Attorney General determination and opinion.

Notwithstanding any other Vendor designation of Vendor's proposal as confidential or proprietary, Vendor's submission of this proposal constitutes Vendor's agreement that proper execution of the required TIPS Confidentiality Claim Form is the only way to assert any portion of Vendor's proposal as confidential.

52 **Non-Discrimination Statement and Certification**

This is a requirement of the TIPS Contract and is non-negotiable.

In accordance with Federal civil rights law, all U.S. Departments, including but not limited to the USDA, USDE, FEMA, are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by federal funds (not all bases apply to all programs).
Vendor certifies that Vendor will comply with applicable Non-Discrimination and Equal Opportunity provisions set forth in TIPS Member Customers' policies and other regulations at the local, state, and federal levels of governments.

☑ Yes, I certify

53 **Limitation of Vendor Indemnification and Similar Clauses**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS, a department of Region 8 Education Service Center, a political subdivision, and local government entity of the State of Texas, is prohibited from indemnifying third-parties (pursuant to the Article 3, Section 52 of the Texas Constitution) except as otherwise specifically provided for by law or as ordered by a court of competent jurisdiction. Article 3, Section 52 of the Texas Constitution states that "no debt shall be created by or on behalf of the State … " and the Texas Attorney General has opined that a contractually imposed obligation of indemnity creates a "debt" in the constitutional sense. Tex. Att'y Gen. Op. No. MW-475 (1982). Thus, contract clauses which require TIPS to indemnify Vendor, pay liquidated damages, pay attorney's fees, waive Vendor's liability, or waive any applicable statute of limitations must be deleted or qualified with ''to the extent permitted by the Constitution and Laws of the State of Texas."

Does Vendor agree?

☑ Yes, I Agree

54 **Alternative Dispute Resolution Limitations**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS, a department of Region 8 Education Service Center, a political subdivision, and local government entity of the State of Texas, does not agree to binding arbitration as a remedy to dispute and no such provision shall be permitted in this Agreement with TIPS. Vendor agrees that any claim arising out of or related to this Agreement, except those specifically and expressly waived or negotiated within this Agreement, may be subject to non-binding mediation at the request of either party to be conducted by a mutually agreed upon mediator as prerequisite to the filing of any lawsuit arising out of or related to this Agreement. Mediation shall be held in either Camp or Titus County, Texas. Agreements reached in mediation will be subject to the approval by the Region 8 ESC's Board of Directors, authorized signature of the Parties if approved by the Board of Directors, and, once approved by the Board of Directors and properly signed, shall thereafter be enforceable as provided by the laws of the State of Texas.

Does Vendor agree?

Yes, Vendor agrees

55 **No Waiver of TIPS Immunity**

This is a requirement of the TIPS Contract and is non-negotiable.

Vendor agrees that nothing in this Agreement shall be construed as a waiver of sovereign or government immunity; nor constitute or be construed as a waiver of any of the privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department. The failure to enforce, or any delay in the enforcement, of any privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department under this Agreement or under applicable law shall not constitute a waiver of such privileges, rights, defenses, remedies, or immunities or be considered as a basis for estoppel.

Does Vendor agree?

☑ Yes, Vendor agrees

56 **Payment Terms and Funding Out Clause**

This is a requirement of the TIPS Contract and is non-negotiable.

Vendor agrees that TIPS and TIPS Members shall not be liable for interest or late-payment fees on past-due balances at a rate higher than permitted by the laws or regulations of the jurisdiction of the TIPS Member.

Funding-Out Clause: Vendor agrees to abide by the applicable laws and regulations, including but not limited to Texas Local Government Code § 271.903, or any other statutory or regulatory limitation of the jurisdiction of any TIPS Member, which requires that contracts approved by TIPS or a TIPS Member are subject to the budgeting and appropriation of currently available funds by the entity or its governing body.

Does Vendor agree?

☑ Yes, Vendor agrees

57 **Certification Regarding Prohibition of Certain Terrorist Organizations (Tex. Gov. Code 2270)**

Vendor certifies that Vendor is not a company identified on the Texas Comptroller's list of companies known to have contracts with, or provide supplies or services to, a foreign organization designated as a Foreign Terrorist Organization by the U.S. Secretary of State.

Does Vendor certify?

Yes, Vendor certifies

58 **Certification Regarding Prohibition of Boycotting Israel (Tex. Gov. Code 2271)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has ten (10) or more full-time employees; and (c) this Agreement or any agreement with a TIPS Member under this procurement has value of $100,000 or more, the following certification shall apply; otherwise, this certification is not required. Vendor certifies, where applicable, that neither the Vendor, nor any affiliate, subsidiary, or parent company of Vendor, if any, boycotts Israel, and Vendor agrees that Vendor and Vendor Companies will not boycott Israel during the term of this Agreement. For purposes of this Agreement, the term "boycott" shall mean and include refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory but does not include an action made for ordinary business purposes.

When applicable, does Vendor certify?

Yes, Vendor certifies

59 **Certification Regarding Prohibition of Contracts with Certain Foreign-Owned Companies (Tex. Gov. Code 2274)**

Certain public entities are prohibited from entering into a contract or other agreement relating to critical infrastructure that would grant Vendor direct or remote access to or control of critical infrastructure in this state, excluding access specifically allowed by a customer for product warranty and support purposes.

Vendor certifies that neither it nor its parent company nor any affiliate of Vendor or its parent company, is (1) owned by or the majority of stock or other ownership interest of the company is held or controlled by individuals who are citizens of China, Iran, North Korea, Russia, or a designated country; (2) a company or other entity, including governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, Russia, or a designated country; or (3) headquartered in China, Iran, North Korea, Russia, or a designated country.

For purposes of this certification, "critical infrastructure" means "a communication infrastructure system, cybersecurity system, electric grid, hazardous waste treatment system, or water treatment facility." Vendor certifies that Vendor will not grant direct or remote access to or control of critical infrastructure, except for product warranty and support purposes, to prohibited individuals, companies, or entities, including governmental entities, owned, controlled, or headquartered in China, Iran, North Korea, Russia, or a designated country, as determined by the Governor.

When applicable, does Vendor certify?

Yes, Vendor certifies

60 **Certification Regarding Prohibition of Discrimination Against Firearm and Ammunition Industries (Tex. Gov. Code 2274)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has at least ten (10) full-time employees; and (c) this Agreement or any Supplemental Agreement with certain public entities have a value of at least $100,000 that is paid wholly or partly from public funds; (d) the Agreement is not excepted under Tex. Gov. Code 2274 and (e) the purchasing public entity has determined that Vendor is not a sole-source provider or the purchasing public entity has not received any bids from a company that is able to provide this written verification, the following certification shall apply; otherwise, this certification is not required.

Vendor certifies that Vendor, or association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary parent company, or affiliate of these entities or associations, that exists to make a profit, does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and will not discriminate during the term of this contract against a firearm entity or firearm trade association.

For purposes of this Agreement, “discriminate against a firearm entity or firearm trade association” shall mean, with respect to the entity or association, to: “(1) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; (2) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or (3) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.”

“Discrimination against a firearm entity or firearm trade association” does not include: “(1) the established policies of a merchant, retail seller, or platform that restrict or prohibit the listing or selling of ammunition, firearms, or firearm accessories; and (2) a company’s refusal to engage in the trade of any goods or services, decision to refrain from continuing an existing business relationship, or decision to terminate an existing business relationship to comply with federal, state, or local law, policy, or regulations or a directive by a regulatory agency, or for any traditional business reason that is specific to the customer or potential customer and not based solely on an entity’s or association’s status as a firearm entity or firearm trade association.”

When applicable, does Vendor certify?

Yes, Vendor certifies

61 **Certification Regarding Termination of Contract for Non-Compliance (Tex. Gov. Code 552.374)**

If Vendor is not a governmental body and (a) this Agreement or any Supplemental Agreement with a public entity has a stated expenditure of at least $1 million in public funds for the purchase of goods or services by certain public entities; or (b) this Agreement or any Supplemental Agreement results in the expenditure of at least $1 million in public funds for the purchase of goods or services by certain public entities in their fiscal year, the following certification shall apply; otherwise, this certification is not required.

As required by Tex. Gov. Code 552.374, the following statement is included in the RFP and the Agreement (unless the Agreement is (1) related to the purchase or underwriting of a public security; (2) is or may be used as collateral on a loan; or (3) proceeds from which are used to pay debt service of a public security of loan): “The requirements of Subchapter J, Chapter 552, Government Code, may apply to this solicitation and Agreement and the Vendor agrees that this Agreement and any applicable Supplemental Agreement can be terminated if Vendor knowingly or intentionally fails to comply with a requirement of that subchapter.”

Pursuant to Chapter 552 of the Texas Government Code, Vendor certifies that Vendor shall: (1) preserve all contracting information related to this Agreement as provided by the records retention requirements applicable to TIPS or the purchasing TIPS Member for the duration of the Agreement; (2) promptly provide to TIPS or the purchasing TIPS Member any contracting information related to the Agreement that is in the custody or possession of Vendor on request of TIPS or the purchasing TIPS Member; and (3) on completion of the Agreement, either (a) provide at no cost to TIPS or the purchasing TIPS Member all contracting information related to the Agreement that is in the custody or possession of Vendor, or (b) preserve the contracting information related to the Agreement as provided by the records retention requirements applicable to TIPS or the purchasing TIPS Member.

When applicable, does Vendor certify?

Yes, Vendor certifies

62 **Certification Regarding Prohibition of Boycotting Certain Energy Companies (Tex. Gov. Code 2274)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has ten (10) or more full-time employees; and (c) this Agreement or any Supplemental Agreement with certain public entities has a value of $100,000 or more that is to be paid wholly or partly from public funds, the following certification shall apply; otherwise, this certification is not required.

Vendor certifies that Vendor, or any wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of these entities or business associations, if any, do not boycott energy companies and will not boycott energy companies during the term of the Agreement or any applicable Supplemental Agreement.

For purposes of this certification the term “company” shall mean an organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, that exists to make a profit.

The term “boycott energy company” shall mean “without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company (a) engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law, or (b) does business with a company described by paragraph (a).” (See Tex. Gov. Code 809.001).

When applicable, does Vendor certify?

Yes, Vendor certifies

63 **Felony Conviction Notice - Texas Education Code 44.034**

Texas Education Code, Section 44.034, Notification of Criminal History, Subsection (a), states, "a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.”

Subsection (b) states, "a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract.”

Subsection (c) states, "This section does not apply to a publicly held corporation.

Vendor certifies one of the following:

A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable, or;

B. My firm is not owned nor operated by anyone who has been convicted of a felony, or;

C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony.

If Vendor responds with Option (C), Vendor is required to provide information in the next attribute.

B. My firm is not owned nor operated by felon.

64 **Felony Conviction Notice - Texas Education Code 44.034 - Continued**

If Vendor selected Option (C) in the previous attribute, Vendor must provide the following information herein:

1. Name of Felon(s)

2. The Felon(s) title/role in Vendor's entity, and

3. Details of Felon(s) Conviction(s).

No response

65 **Conflict of Interest Questionnaire Requirement**

Vendor agrees that it has looked up, read, and understood the current version of Texas Local Government Code Chapter 176 which generally requires disclosures of conflicts of interests by Vendor hereunder if Vendor:

(1) has an employment or other business relationship with a local government officer of our local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of our local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of our local governmental entity.

(4) Any other financial, commercial, or familial relationship with our local government that may warrant reporting under this statute.

Does Vendor certify that it has NO reportable conflict of interest?

Yes, Vendor certifies - VENDOR HAS NO CONFLICT

66 **Conflict of Interest Questionnaire Requirement - Form CIQ - Continued**

If you responded "No, Vendor does not certify - VENDOR HAS CONFLICT" to the Conflict of Interest Questionnaire question above, you are required by law to fully execute and upload the form attachment entitled "Conflict of Interest Questionnaire - Form CIQ." If you accurately claimed no conflict above, you may disregard the form attachment entitled "Conflict of Interest Questionnaire - Form CIQ."
Have you uploaded this form if applicable?

Not Applicable

67 **Upload of Current W-9 Required**

Vendors are required by TIPS to upload a current, accurate W-9 Internal Revenue Service (IRS) Tax Form for your entity. This form will be utilized by TIPS to properly identify your entity.

You must confirm that you are responding to this solicitation under your legal entity name. Go now to your Supplier Profile in this eBid System and confirm that your profile reflects your "Legal Name" as it is listed on your W9.

68 **Regulatory Good Standing Certification**

Does Vendor certify that its entity is in good standing will all government entities and agencies, whether local, state, or federal, that regulate any aspect of Vendor's field of work or business operations?

If Vendor selects "No", Vendor must provide explanation on the following attribute question.

Yes, Vendor certifies

69	**Regulatory Good Standing Certification - Explanation - Continued** If Vendor responded to the prior attribute that "No", Vendor is not in good standing, Vendor must provide an explanation of that lack of good standing here for TIPS consideration. *No response*

70	**Instructions Only - Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion** **Instructions for Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion** 1. By answering yes to the next Attribute question below, the vendor and prospective lower tier participant is providing the certification set out herein in accordance with these instructions. 2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment. 3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances. 4. The terms “covered transaction,” “debarred,” “suspended,” “ineligible,” “lower tier covered transaction,” “participants,” “person,” “primary covered transaction,” “principal,” “proposal” and “voluntarily excluded,” as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations. 5. The prospective lower tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated. 6. The prospective lower tier participant further agrees by submitting this form that it will include this clause titled “Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transaction” without modification in all lower tier covered transactions and in all solicitations for lower tier covered transactions. 7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List. 8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings. 9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment.

71

Suspension or Debarment Certification

Read the instructions in the attribute above and then answer the following accurately.

Vendor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

Does Vendor certify?

Yes, Vendor certifies

72

Vendor Certification of Criminal History - Texas Education Code Chapter 22

Texas Education Code Chapter 22 requires entities that contract with school districts to provide services to obtain criminal history record information regarding covered employees. Contractors must certify to the district that they have complied. Covered employees with disqualifying criminal histories are prohibited from serving at a school district pursuant to this law.

DEFINITIONS

Covered employees: Employees of a contractor or subcontractor who have or will have continuing duties related to the service to be performed at the District and have or will have direct contact with students. The District will be the final arbiter of what constitutes direct contact with students.

Disqualifying criminal history: Any conviction or other criminal history information designated by the District, or one of the following offenses, if at the time of the offense, the victim was under 18 or enrolled in a public school: (a) a felony offense under Title 5, Texas Penal Code; (b) an offense for which a defendant is required to register as a sex offender under Chapter 62, Texas Code of Criminal Procedure; or (c) an equivalent offense under federal law or the laws of another state.

Vendor certifies:

NONE (Section A): None of the employees of Vendor and any subcontractors are covered employees, as defined above. If this box is checked, I further certify that Contractor has taken precautions or imposed conditions to ensure that the employees of Vendor and any subcontractor will not become covered employees. Contractor will maintain these precautions or conditions throughout the time the contracted services are provided under this procurement.

OR

SOME (Section B): Some or all of the employees of Vendor and any subcontractor are covered employees. If this box is checked, I further certify that: (1) Vendor has obtained all required criminal history record information regarding its covered employees. None of the covered employees has a disqualifying criminal history; (2) If Vendor receives information that a covered employee subsequently has a reported criminal history, Vendor will immediately remove the covered employee from contract duties and notify the purchasing entity in writing within 3 business days; (3) Upon request, Vendor will provide the purchasing entity with the name and any other requested information of covered employees so that the purchasing entity may obtain criminal history record information on the covered employees; (4) If the purchasing entity objects to the assignment of a covered employee on the basis of the covered employee's criminal history record information, Vendor agrees to discontinue using that covered employee to provide services at the purchasing entity.

Which option does Vendor certify?

Yes, I certify - NONE (Section A)

73 **Certification Regarding "Choice of Law" Terms with TIPS Members**

Vendor agrees that if any "Choice of Law" provision is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Choice of Law" applicable to the sales agreement/contract between Vendor and TIPS Member shall be the state where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Choice of Law" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

74 **Certification Regarding "Venue" Terms with TIPS Members**

Vendor agrees that if any "Venue" provision is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Venue" for any litigation or alternative dispute resolution is shall be in the state and county where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Venue" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

75 **Certification Regarding "Automatic Renewal" Terms with TIPS Members**

Vendor agrees that no TIPS Sale may incorporate an "Automatic Renewal" clause that exceeds month to month terms with which the TIPS Member must comply. All renewal terms incorporated into a TIPS Sale Supplemental Agreement shall only be valid and enforceable when Vendor received written confirmation of acceptance of the renewal term from the TIPS Member for the specific renewal term. The purpose of this clause is to avoid a TIPS Member inadvertently renewing a Supplemental Agreement during a period in which the governing body of the TIPS Member has not properly appropriated and budgeted the funds to satisfy the Agreement renewal. Any TIPS Sale Supplemental Agreement containing an "Automatic Renewal" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

76

Certification Regarding "Indemnity" Terms with TIPS Members

Texas and other jurisdictions restrict the ability of governmental entities to indemnify others. Vendor agrees that if any "Indemnity" provision which requires the TIPS Member to indemnify Vendor is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must either be stricken or qualified by including that such indemnity is only permitted, "to the extent permitted by the laws and constitution of [TIPS Member's State]" unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing an "Indemnity" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

77

Certification Regarding "Arbitration" Terms with TIPS Members

Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause may ***not*** require that the arbitration is mandatory or binding. Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause provides for only voluntary and non-binding arbitration unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a “Arbitration” clause that conflicts with these terms is rendered void and unenforceable.
If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

78

2 CFR PART 200 AND FEDERAL CONTRACT PROVISIONS EXPLANATION

TIPS and TIPS Members will sometimes seek to make purchases with federal funds. In accordance with 2 C.F.R. Part 200 of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (sometimes referred to as “EDGAR”),Vendor's response to the following questions labeled "2 CFR Part 200 or Federal Provision" will indicate Vendor's willingness and ability to comply with certain requirements which may be applicable to TIPS purchases paid for with federal funds, if accepted by Vendor.

Your responses to the following questions labeled "2 CFR Part 200 or Federal Provision" will dictate whether TIPS can list this awarded contract as viable to be considered for a federal fund purchase. **Failure to certify all requirements labeled "2 CFR Part 200 or Federal Provision" will mean that your contract is listed as not viable for the receipt of federal funds. However, it will not prevent award.**

If you do enter into a TIPS Sale when you are accepting federal funds, the contract between you and the TIPS Member will likely require these same certifications.

79	**2 CFR Part 200 or Federal Provision - Prohibition of Cost Plus** Contracts paid with federal funds which exceed the simplified acquisition threshold currently set at $250,000 (2 CFR 200.320), which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, may not utilize a cost plus percentage of cost and percentage of cost method of contract pricing. Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members for a TIPS Sale resulting from this procurement process which exceeds the simplified acquisition threshold, Vendor shall not utilize a cost plus a percentage of cost and percentage of cost method of contract pricing for that expenditure. If Vendor fails to certify and proposes a Cost Plus Markup Method of pricing anywhere in their proposal, Vendor will **not** be listed as federally/EDGAR compliant for TIPS purposes. Does Vendor certify? Yes, Vendor agrees.
80	**2 CFR Part 200 or Federal Provision - Vendor Willingness to Accept Federal Funds** This certification is not required by federal law. However, TIPS Members are public entities and qualifying non-profits which often receive federal funding and grants (ESSER, CARES Act, EDGAR, etc.) ***Accepting such funds often requires additional required certifications and responsibilities for Vendor.*** The following attribute questions include these required certifications. Your response to this questions, the following certifications, and other factors will determine whether your contract award will be deemed as eligible for federal fund expenditures by TIPS Members. If awarded, is Vendor willing to accept payment for goods and services offered under this contract paid for by a TIPS Member with federal funds? Yes
81	**2 CFR Part 200 or Federal Provision - Contracts** Contracts for more than the simplified acquisition threshold currently set at $250,000 (2 CFR § 200.320), which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate. Notice: Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserve all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party. Does vendor agree? Yes, Vendor agrees

82

2 CFR Part 200 or Federal Provision - Termination

Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of $10,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserve the right to terminate any agreement in excess of $10,000 resulting from this procurement process for cause after giving the vendor an appropriate opportunity and up to 30 days, to cure the causal breach of terms and conditions. ESC Region 8 and TIPS Members reserve the right to terminate any agreement in excess of $10,000 resulting from this procurement process for convenience with 30 days notice in writing to the awarded vendor. The Vendor would be compensated for work performed and goods procured as of the termination date if for convenience of the ESC Region 8 and TIPS Members. Any award under this procurement process is not exclusive and the ESC Region 8 and TIPS reserves the right to purchase goods and services from other vendors when it is in the best interest of the ESC Region 8 and TIPS.

Does vendor agree?

Yes, Vendor agrees

83

2 CFR Part 200 or Federal Provision - Clean Air Act

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of $150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
Pursuant to the Clean Air Act, et al above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members require that the proposer certify that during the term of an award by the ESC Region 8 and TIPS Members resulting from this procurement process the vendor agrees to comply with all of the above regulations, including all of the terms listed and referenced therein.
Does vendor agree?

Yes, Vendor agrees

84

2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment

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

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members require the proposer certify that during the term and during the life of any contract with ESC Region 8 and TIPS Members resulting from this procurement process the vendor certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352).

Does Vendor agree?

Yes, Vendor agrees

85

2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment - Continued

Applicable to Grants, Subgrants, Cooperative Agreements, and Contracts Exceeding $100,000 in Federal Funds

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

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

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

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, “disclosure Form to Report Lobbying,” in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all covered subawards exceeding $100,000 in Federal funds at all appropriate tiers and that all subrecipients shall certify and disclose accordingly.

Does Vendor certify that it has NOT lobbied as described herein?

Yes, Vendor certifies - NO Reportable Lobbying

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2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment - Continued

If you answered "No, Vendor does not certify - Lobbying to Report" to the above attribute question, you must download, read, execute, and upload the attachment entitled "Disclosure of Lobbying Activities - Standard Form - LLL", as instructed, to report the lobbying activities you performed or paid others to perform.

87

2 CFR Part 200 or Federal Provision - Federal Rule

Compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15). (Contracts, subcontracts, and subgrants of amounts in excess of $100,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members requires the proposer certify that in performance of the contracts, subcontracts, and subgrants of amounts in excess of $250,000, the vendor will be in compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).

Does vendor certify compliance?

Yes, Vendor certifies

88

2 CFR Part 200 or Federal Provision - Procurement of Recovered Materials

A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include: (1) procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; (2) procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Does vendor certify that it is in compliance with these provisions?

Yes, Vendor certifies

89

2 CFR Part 200 or Federal Provision - Rights to Inventions

If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.
Pursuant to the above, when the foregoing applies to ESC Region 8 and TIPS Members, Vendor certifies that during the term of an award resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in the Federal rule above.
Does vendor certify?

Yes, Vendor certifies

90

2 CFR Part 200 or Federal Provision - Domestic Preferences for Procurements and Compliance with Buy America Provisions

As appropriate and to the extent consistent with law, TIPS Member Customers, to the greatest extent practicable under a Federal award, may provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). Vendor agrees that the requirements of this section will be included in all subawards including all contracts and purchase orders for work or products under this award, to the greatest extent practicable under a Federal award. For purposes of 2 CFR Part 200.322, “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stag through the application of coatings, occurred in the United States. Moreover, for purposes of 2 CFR Part 200.322, “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum, plastics and polymer-based products such as polyvinyl chloride pipe, aggregates such as concrete, glass, including optical fiber, and lumber.

Vendor certifies that it is in compliance with all applicable provisions of the Buy America Act. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition. For purposes of 2 CFR Part 200.322,

“Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

“Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that to the greatest extent practicable Vendor will provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

Does Vendor Certify?

Yes, Vendor certifies

91

2 CFR Part 200 or Federal Provision - Ban on Foreign Telecommunications

ESC 8 and TIPS Members are prohibited from obligating or expending Federal financial assistance, to include loan or grant funds, to: (1) procure or obtain, (2) extend or renew a contract to procure or obtain, or (3) enter into a contract (or extend or renew a contract) to procure or obtain, equipment, services, or systems that use “covered telecommunications” equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. “Covered telecommunications” equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities), and physical security surveillance of critical infrastructure and other national security purposes, and video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities) for the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes detailed in 2 CFR § 200.216.

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that Vendor will not purchase equipment, services, or systems that use “covered telecommunications”, as defined by 2 CFR §200.216 equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

Does vendor certify?

Yes, Vendor certifies

92

2 CFR Part 200 or Federal Provision - Contract Cost & Price

For contracts more than the simplified acquisition threshold currently set at $250,000, a TIPS Member may, in very rare circumstances, be required to negotiate profit as a separate element of the price pursuant to 2 C.F.R. 200.324(b). Under those circumstances, Vendor agrees to provide information and negotiate with the TIPS Member regarding profit as a separate element of the price. However, Vendor certifies that the total price charged by the Vendor shall not exceed the Vendor's TIPS pricing and pricing terms proposed.

Does Vendor certify?

Yes, Vendor certifies

93

2 CFR Part 200 or Federal Provision - Equal Employment Opportunity

Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members on any federally assisted construction contract, the equal

opportunity clause is incorporated by reference here.

Does Vendor Certify?

Yes, Vendor certifies

94

2 CFR Part 200 or Federal Provision - Davis Bacon Act Compliance

Texas Statute requires compliance with Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146- 3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non- Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

Pursuant to state and federal requirements, Vendor certifies that it will be in compliance with all applicable Davis-Bacon Act provisions if/when applicable.

Does Vendor certify?

Yes, Vendor certifies

95

2 CFR Part 200 or Federal Provision - Contract Work Hours and Safety Standards

Where applicable, all contracts awarded by ESC 8 and TIPS Members in excess of $100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.
Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that during the term of an award for all contracts resulting from this procurement process, Vendor will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act.

Does Vendor certify?

Yes, Vendor certifies

96

2 CFR Part 200 or Federal Provision - FEMA Fund Certification & Certification of Access to Records

If and when Vendor accepts a TIPS purchase paid for in full or part with FEMA funds, Vendor certifies that:

(1) Vendor agrees to provide the TIPS Member, the FEMA Administrator, the Comptroller General of the United States, or any of their authorized representatives access to and rights to reproduce any books, documents, papers, and records of the Contractor which are directly pertinent to this contract, or any contract resulting from this procurement, for the purposes of making audits, examinations, excerpts, and transcriptions. This right also includes timely and reasonable access to Vendor's personnel for the purpose of interview and discussion relating to such documents. Vendor agrees to provide the FEMA Administrator or an authorized representatives access to construction or other work sites pertaining to the work being completed under the contract. Vendor acknowledges and agrees that no language in this contract or the contract with the TIPS Member is intended to prohibit audits or internal reviews by the FEMA Administrator or the Comptroller General of the United States.

(2) The Vendor shall not use the Department of Homeland Security's seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre-approval.

(3) The Vendor will comply with all applicable Federal law, regulations, executive orders, FEMA policies, procedures, and directives.

(4) The Federal Government is not a party to this contract and is not subject to any obligations or liabilities to the non-Federal entity, contractor, or any other party pertaining to any matter resulting from the contract.

(5) The Vendor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the Vendor's actions pertaining to this contract.

Does Vendor certify?

Yes, Vendor certifies

97

2 CFR Part 200 or Federal Provision - Certification of Compliance with the Energy Policy and Conservation Act

When appropriate and to the extent consistent with the law, Vendor certifies that it will comply with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq; 49 C.F.R. Part 18) and any state mandatory standards and policies relating to energy efficiency which are contained in applicable state energy conservation plans issued in compliance with the Act.

Does Vendor certify?

Yes, Vendor certifies

98

2 CFR Part 200 or Federal Provision - Certification of Compliance with Never Contract with the Enemy

Where applicable, all contracts awarded by ESC 8 and TIPS Members in excess of $50,000.00, within the period of performance, and which are performed outside of the United States, including U.S. territories, are subject to the regulations implementing Never Contract with the Enemy in 2 CFR part 183. Per 2 CFR part 183, in the situation specified, ESC 8 and TIPS Members shall terminate any contract or agreement resulting from this procurement which violates the Never Contract with the Enemy regulation in 2 CFR part 183, including if Vendor is actively opposing the United States or coalition forces involved in a contingency operation in which members of the the Armed Forces are actively engaged in hostilities. Vendor certifies that it is neither an excluded entity under the System for Award Management (SAM) nor Federal Awardee Performance and Integrity Information System (FAPIIS) for any contract terminated due to Never Contract with the Enemy as a Termination for Material Failure to Comply.

Does Vendor certify?

Yes, Vendor certifies

99

2 CFR Part 200 or Federal Provision - Certification of Compliance with EPA Regulations

For contracts resulting from this procurement, in excess of $100,000.00 and paid for with federal funds, Vendor certifies that Vendor will comply with all applicable standards, orders, regulations, and/or requirements issued pursuant to the Clean Air Act of 1970, as amended (42 U.S.C. 1857(h)), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15.

Does Vendor certify?

Yes, Vendor certifies

100

2 CFR Part 200 or Federal Provision - Record Retention Requirements

For contracts resulting from this procurement, paid for by ESC 8 or TIPS Members with federal funds, Vendor certifies that Vendor will comply with the record retention requirements detailed in 2 CFR § 200.334. Vendor certifies that Vendor will retain all records as required by 2 CFR § 200.334 for a period of three years after final expenditure or financial reports, as applicable, and all other pending matters are closed.

Does Vendor certify?

Yes, Vendor certifies

101

2 CFR Part 200 or Federal Provision - Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms.

Do you ever anticipate the possibility of subcontracting any of your work under this award if you are successful?

If you respond "Yes", you must respond to the following attribute question accurately. If you respond "No", you may skip the following attribute question.

~~YES~~ Vendor corrected to response to 'NO' via email on 6.25.25.

102	**2 CFR Part 200 or Federal Provision - If "Yes" Response to Above Attribute - Continued - Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms.** **Only respond to this question if you responded "Yes" to the attribute question directly above. Skip this question if you responded "No" to the attribute question directly above.** Does Vendor certify that it will follow the following affirmative steps? Federal Regulation 2 CFR §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms. (a)The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. (b) Affirmative steps must include: (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists; (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources; (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises; (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises; (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce ; and (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs(1) through (5) of this section. Does Vendor certify? *No response*
103	**ACKNOWLEDGMENT & BINDING CORPORATE AUTHORITY** By submitting this proposal, the individual(s) submitting on behalf of the Vendor certify that they are authorized by Vendor to complete and submit this proposal on behalf of Vendor and that this proposal was duly submitted on behalf of Vendor by authority of its governing body, if any, and within the scope of its corporate powers. Vendor further certifies that it has read, examined, and understands all portions of this solicitation including but not limited to all attribute questions, attachments, solicitation documents, bid notes, and the Vendor Agreement(s). Vendor certifies that, if necessary, Vendor has consulted with counsel in understanding all portions of this solicitation.

KCS | DR. JON RYSEWYK
Superintendent
KNOX COUNTY SCHOOLS

June 17, 2025

RE: Reference Letter for United Elevator

To whom it may concern:

Please accept this reference for United Elevator who provided goods and services to Knox County Schools. They have provided elevator services including installations, monthly maintenance, and compliance inspections for Knox County Schools in 2024-25 as well as several years prior. We understand they have submitted a proposal to Education Service Center Region 8 and TIPS Cooperative.

Knox County Schools has been a customer of United Elevator for several years, and they have always exceeded commitments and expectations. We plan to continue to partner with them and would highly recommend United Elevator to TIPS public entity and non-profit members.

Thank you,

Lori Hall, Operations Supervisor
Knox County Schools
Maintenance & Operations Department
900 E. Fifth Avenue
Knoxville, TN 37917
(865) 594-3774

United Elevator Services
PO Box 1308
Knoxville, TN 37901

To whom it may concern

I am writing this letter to recommend United Elevator Services, LLC as a candidate for your TIPS program. They have proven to be dependable and consistently exceed expectations as a vendor for doing work in my schools. Their ability to analyze challenges, develop solutions, and collaborate with us makes them an asset to my workplace. The employees are friendly and very knowledgeable.

If you are looking for a company that is hardworking, dependable, and can-do problem-solving skills, I highly encourage you to consider United Elevator Services, LLC to be a member of your organization. Please do not hesitate to contact me if you need further insights.

Sincerely,

Mary Kington

Mary Kington

mkington@ccschools.k12tn.net
931-484-5763

CCBOE Maintenance Supervisor

736 Old Mail Road
Crossville, TN 38555

HAMBLEN COUNTY DEPARTMENT OF EDUCATION

210 East Morris Boulevard
Morristown, Tennessee 37813
Phone (423) 586-7700 • Fax (423) 586-7747

The mission of Hamblen County Schools is to educate students so they can be challenged to successfully compete in their chosen fields.

ARNOLD W. BUNCH, JR.
Superintendent of Schools

BOARD OF EDUCATION
Carolyn Clawson
Johnny Denton
Bradley Harville
Clyde Kinder
Darlene Smith
Jerrod Weems
Robert Workman

DATE: June 17, 2025

From: Jay Wilkes, supervisor of Maintenance Dept

Re: Reference letter for United Elevator

To whom it may concern, please accept this reference for United Elevator who has provided services for Hamblen County Dept of Education for several years. We understand that they have Submitted a proposal to Education Service Region 8 and the TIPS Cooperative.

United Elevator has performed outstanding service to our school Systems Elevators & we would highly recommend them to TIPS Public entity & non-profit members.

Hamblen County Dept of education would most certainly do business with United Elevator in the future.

Jay Wilkes

Jay Wilkes

JW/jas

TIPS CONTRACT 250502

REQUIRED CONFIDENTIALITY CLAIM FORM

(VENDOR MUST COMPLETE THE FOLLOWING VENDOR INFORMATION)

Vendor Entity Name: United Elevator Services, LLC

Vendor Authorized Signatory Name: Shawn Lyness

Vendor Authorized Signatory Title: Sales Manager

Vendor Authorized Signatory Email: shawnl@unitedelevator.com

Vendor Address: PO Box 1308

City: Knoxville State: TN Zip Code: 37901

Vendor agrees that it is voluntarily providing its data (including but not limited to: Vendor information, Vendor documentation, Vendor's proposal, Vendor pricing submitted or provided to TIPS, TIPS contract documents, TIPS correspondence, Vendor logos and images, Vendor's contact information, Vendor's brochures and commercial information, Vendor's financial information, Vendor's certifications, and any other Vendor information or documentation submitted to TIPS by Vendor and its agents) (Hereinafter, "Vendor Data") to TIPS. Vendor understands and agrees that TIPS is a government entity subject to public information laws including but not limited to Texas Government Code (TGC) Chapter 552. Vendor agrees that regardless of confidentiality designations herein, Vendor's submission of a proposal constitutes Vendor's consent to the disclosure and release of Vendor's Data and comprehensive proposal, including any information deemed confidential or proprietary herein, to and by TIPS Members.

Notwithstanding the foregoing permissible release to TIPS Members, if Vendor considers any portion of Vendor's proposal to be otherwise confidential and not subject to public disclosure pursuant to public information laws, including but not limited to TGC Chapter 552, Vendor must properly execute ***Option 1 only*** below, attach to this PDF all documents and information that Vendor deems confidential, and upload the consolidated documentation. Regardless of the Option selected below, this form must be completed and uploaded to the "Response Attachments" section of the eBid System entitled "Required Confidentiality Claim Form." Execution and submission of this form is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a request, a Public Information Request, or subpoena. If TIPS receives a request, any responsive documentation not deemed confidential by you through proper execution of Option 1 of this form will be automatically released. For information deemed confidential by you through proper execution of Option 1 of this form, TIPS will follow procedures of controlling statute(s) regarding withholding that documentation and shall not be liable for any release of information required by law, including Attorney General opinion or court order.

(VENDOR MUST COMPLETE ONE OF THE TWO OPTIONS AND UPLOAD IN THE EBID SYSTEM)

OPTION 1 – DESIGNATING CONFIDENTIAL MATERIALS – YES, VENDOR HAS ATTACHED CONFIDENTIAL MATERIALS

(Confirm each bullet point and sign below)

- Vendor claims some Vendor Data confidential to the extent permitted by TGC Chapter 552 and other applicable law.
- Vendor attached to this PDF all potentially confidential Vendor Data and listed the number of attached pages below.
- Vendor's authorized signatory has signed below and shall upload this document in the proper location in the eBid System.
- Vendor agrees that TIPS shall not be liable for any release of confidential information required by law.

Number of pages attached deemed confidential: _____

Authorized Signature: _____

OPTION 2 – WAIVER OF CONFIDENTIALITY – NO, VENDOR HAS NOT ATTACHED CONFIDENTIAL MATERIALS

(Confirm each bullet point and sign below)

By signing for Option 2 below, Vendor expressly waives any confidentiality claim for all Vendor Data submitted in relation to this proposal and resulting contract. Vendor confirms that TIPS may freely release Vendor Data submitted in relation to this proposal or resulting contract to any requestor. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of Vendor Data by TIPS or TIPS Members.

- Vendor's authorized signatory has signed below and shall upload this document in the proper location in the eBid System.
- Vendor agrees that TIPS shall not be liable for any release of confidential information required by law.

Authorized Signature: Shawn Lyness

TIPS PART 2 SOLICITATION DOCUMENT

THE INTERLOCAL PURCHASING SYSTEM ("TIPS")

A department of TIPS Lead Agency:

TEXAS REGION 8 EDUCATION SERVICE CENTER ("Region 8 ESC")

TIPS RCSP 250502 Elevators and Servicing JOC (PART 2)

I. NOTICE TO PROPOSERS.

Contact Information:
TIPS/Region 8 ESC
4845 US Hwy. 271 North
Pittsburg, Texas 75686
Toll Free: (866) 839-8477
Email: bids@tips-usa.com
Website: www.tips-usa.com

Part 2 Notice: This solicitation document applies to Part 2 of this opportunity only. All terms, conditions, information, and notices are applicable to Part 2. If you have questions about whether to respond to Part 1, Part 2, or both Parts 1 & 2, please carefully review the attachment entitled "TIPS Informational – Do I Respond to Part 1, Part 2, or Both?"

TIPS Solicitation:
TIPS RCSP 250502 Elevators and Servicing JOC
This solicitation document is a Request for Competitive Sealed Proposals as permitted in Texas Government Code § 2269. Regardless of potential informal or erroneous references to other solicitation terms such as: "solicitation", "bid", "request for competitive sealed proposal", "RFP", etc., this solicitation is the method of procurement identified at this location. This solicitation is for the sale of installation or construction projects considered a "public work" and whether a sale is classified as a "public work" is within the sole discretion of the purchasing TIPS Member entity based on the scope of work and applicable law.

Proposal Deadline:
All proposals shall be received electronically, or otherwise sealed, by: June 20, 2025 AT 3:00 P.M. LOCAL TIME

Access to Solicitation Documents:
Solicitation documents are located online at http://tips.ionwave.net. If you encounter a problem while accessing the solicitation, please contact TIPS at the contact information provided for assistance.

Piggybacking Notice:

This IDIQ Solicitation is intended for the use of public entities and qualifying non-profit entities who join TIPS, now and in the future, ("TIPS Members") to piggyback upon and utilize as their own solicitation for legal procurement purposes. TIPS Contracts are established through free, full and open competition as described by the laws of TIPS jurisdiction and are available for piggy-back by other government entities anywhere in the United States, subject to each entities' jurisdictional law and regulation. For the purpose of enhanced accessibility, potential cost savings, increased flexibility and choice, and to ensure adequate coverage of requirements for Region 8 Education Service Center and TIPS Members, multiple awards are anticipated.

TIPS Administration Fee:
TIPS collection of fees is required pursuant to Texas Government Code Section 791.011 et. seq. The TIPS Administration Fee for this contract shall be 2% of the amount paid by the TIPS Member for each TIPS Sale, less shipping cost, bond cost, and taxes, if identifiable.

Incorporation of Solicitation:
If Vendor proposes and is awarded, the specifications, terms, and conditions of this solicitation shall be incorporated by reference into the final, awarded TIPS Contract.

TIPS Contract Jurisdictional Limitations:
Depending on different entities' and jurisdictions' laws and regulations, TIPS Member Customers may be prohibited from utilizing TIPS as a procurement method for any specific procurement or procurement-type. TIPS makes no representations about when a TIPS procurement will be appropriate for any particular expenditure. It is always up to the TIPS Member customer to determine whether a TIPS procurement is appropriate under their applicable laws and policies.

Vendor Questions & Pre-Bid Meeting Requests:
Substantive questions will be received until June 6, 2025 at 12:00 p.m. local time. Questions about the specific solicitation shall be submitted to bids@tips-usa.com with the subject line "TIPS 250502 Elevators and Servicing (Part 2) – Vendor Question". Vendor-specific questions about the process will often be answered directly. However, substantive questions that are not properly addressed in the solicitation information will be properly published to all vendors as an addendum or "Question & Answer" document.

Pre-Bid Meetings are not mandatory and, if requested, TIPS reserves the right to determine whether a Pre-Bid meeting shall be held. Pre-Bid Meetings may be requested by any proposer on or before May 15, 2025 by emailing bids@tips-usa.com with the subject line "TIPS 250502 Elevators and Servicing (Part 2) – Pre-Bid Meeting Request".

Anticipated Schedule of Solicitation Events:
These anticipated dates are subject to change at TIPS' discretion. TIPS reserves the right to extend the proposal deadline for any reason.

Posting Date	May 1, 2025	8:00 A.M. Local Time
Proposal Deadline	June 20, 2025	3:00 P.M. Local Time
Proposal Opening	June 20, 2025	3:00 P.M. Local Time
Proposal Review Begins	June 20, 2025	3:01 P.M. Local Time
Proposals Award	July 24, 2025	8:30 A.M. Local Time
Award Notifications	July 24, 2025	12:00 P.M. Local Time

Estimated Contract Value:
The estimated value for the life of the contract for all awarded vendors combined is $147,636.10. This is an estimate and is not a guarantee of the minimum or maximum value of the contract because TIPS cannot speculate on TIPS Members' future needs or budget allocations as they relate to this solicitation.

II. TIPS

The Interlocal Purchasing System ("TIPS") is a department of Texas Region 8 Education Service Center, a government entity. TIPS, a governmental entity and a national purchasing cooperative operating under the Interlocal Cooperation Act[1], seeks to provide a valuable and necessary solution to public entities and qualifying non-profits by performing the legal public procurement solicitation process and awarding compliant contracts to qualified vendors. When permitted by TIPS Members' law and policy, instead of public entities and qualifying non-profits expending time, money, and resources on the extensive legal competitive procurement process, the use of TIPS, allows public entities to quickly select and purchase their preferred products or services from qualified, evaluated Vendors on an as-needed basis. TIPS evaluates and scores all responsive, properly submitted proposals. Recommendations for award will be made to the Region 8 Education Service Center Board of Directors. Awards are ratified or rejected at the monthly meeting of Region 8 ESC Board of Directors, or as delegated by the Board of Directors. TIPS utilizes a value approach and bases its award recommendations on several factors mandated by the Texas Education Code section §44.031. The factors are allotted points as described herein. TIPS reserves the right to assign or deduct any number of points in any given category if warranted due to insufficient response or Vendor stipulated exceptions and limitations.

III. PROPOSAL GUIDANCE

1. TIPS strongly encourages all interested vendors to respond using the TIPS IonWave Electronic eBid System for proposal submission. The online submission has many safeguards built into the system that will notify proposers of mistakes or missing information. These safeguards will significantly minimize the potential for Vendor disqualification. If you encounter trouble with the TIPS IonWave eBid System, please contact TIPS.
2. If it is determined that Vendor cannot utilize the TIPS IonWave eBid System, Vendor must email bids@tips-usa.com seeking a manual submission packet which TIPS will send to you via US Mail or FedEx within two business days of receiving your request. All manual responses must be sealed in an envelope and must be physically received by TIPS at the TIPs Contact information provided herein and by the deadline provided herein.
3. If you are viewing this document, you have likely already logged into the TIPS IonWave eBid System. If not, you need to register/login to the TIPS IonWave eBid System online at https://tips.ionwave.net/ and follow these instructions.
4. Once logged in, confirm that your Supplier Profile properly lists your accurate entity-name, EIN, d/b/a's, and contact information, matching your current W9. If it does not, either correct it, or disable the inaccurate profile and create a correct profile before proceeding.
5. Next, confirm that all emails issued by the following domains can be received by your entity's email servers to ensure that you do not miss vital messages: "@tips-usa.com", @tipsconstruction.com", and "ionwave.net"
6. Once that review/update is complete, Vendor shall carefully read through all bid Event Details, Bid Notes, Attachments, Addenda, Instructions, and Attribute Questions before submitting questions to TIPS.
7. TIPS recommends starting Vendor's proposal response by answering the required "Attribute" questions within the IonWave eBid System. These responses are required and it is beneficial to start with the Attribute questions as some of the bid Attachments are only required depending on your responses to those questions.
8. Once Vendor has completed the Attribute Questions, Vendor must download, properly complete, and upload into the correct "Response Attachments" location all required Attachments for Part 2.
9. Once Vendor has completed the Attribute Questions and uploaded all required Attachments for Part 2, Vendor must submit the proposal before the legal Proposal Deadline. The system will notify you of errors and allow you to correct those errors where you would otherwise risk unintentional disqualification through paper submission.
10. Proposals may be retracted, amended, and resubmitted by the proposer on the electronic eBid System at any time prior to the legal deadline.
11. If an addendum is posted, you will receive an email notification and you are required to login to the IonWave eBid System to address the Addendum.
12. TIPS reserves the right to reject any or all proposals, to accept any proposals, and to waive any informality in the proposal process provided waiver is equally applied to all proposers and another proposer is not prejudiced by the waiver.
13. If Vendor has proposed deviations to TIPS' standard terms, there is an Attribute Question where Vendor can assert that it has proposed negotiations. If Vendor responds to that attribute question asserting deviations, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document Vendor Agreement and instruct Vendor to include all requested negotiations as redline edits for TIPS consideration. This is the only proper way to submit proposed deviations for TIPS consideration. TIPS reserves the right to accept, decline, or modify Vendor's requested negotiated terms. For this reason, asserting deviations or negotiations may ultimately delay or prevent award.
14. Withdrawal of proposals will not be allowed for a period of 90 days following the opening unless approved by TIPS in writing.
15. If a Vendor desires to protest a process or decision by TIPS, the Vendor must follow the following process: http://www.tips-usa.com/assets/documents/docs/letters/Protest_Procedures_for_Vendor.pdf

[1] See Texas Government Code, Chapter 791.

Proposal Format

All responses should be direct, concise, complete, and unambiguous.

1. **Attribute Questions.**
   Vendor must respond carefully and accurately to all "Attributes" within the IonWave eBid System.

2. **Completion of Attachments & Required Uploads.**

   Part 2 Required Bonding Capacity Letter
   If Proposing on Part 2, Vendor is required to upload a Bonding Capacity Letter from its surety as described herein. Please see the attachment entitled "Instructions and Sample – Part 2 Required Bonding Capacity Letter" for complete instructions. On Part 2, Vendor will be scored on the aggregate bonding capacity displayed in the accepted letter. Vendor must provide a current letter (issued on or after the first day of the month preceding the date on which the solicitation was posted) from its surety verifying Vendor's bonding capacity as described herein. (Ex. if the solicitation/bid posted on February 4, 2022, the letter must be dated on or after January 1 2022. The letter must be issued from Vendor's Surety companies, on surety company letterhead, must specify the maximum bonding capacity of the Vendor, and must be signed by an authorized representative of the surety company. The issuing surety must be authorized to do business in the State of Texas and must be listed on the Department of the Treasury's Listing of Approved Sureties (Department Circular 570).

   Vendor Agreement (Part 2)
   If responding to Part 2, the Vendor Agreement (Part 2) must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Vendor Agreement (Part 2). If Vendor has proposed deviations to the Vendor Agreement (Part 2), Vendor may assert so in the Attribute Questions and those shall be addressed during evaluation.

   Vendor Agreement Signature Form (Part 2)
   If responding to Part 2, the Vendor Agreement Signature Form (Part 2) must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Vendor Agreement Signature Form (Part 2). If Vendor has proposed deviations to the Vendor Agreement (Part 2), Vendor may leave the signature line of this page blank and assert so in the Attribute Questions and those shall be addressed during evaluation.

   Reference Letters
   Vendor is required to upload three Reference Letters from three separate customers as described herein. Vendor will be scored on the aggregate Reference Letters received from customers as described in the solicitation. Vendor must provide three current letters (issued within the 12-months preceding the date on which the solicitation was posted) from its customers verifying Vendor's customer service and reputation as described herein. (Ex. if the solicitation/bid posted on February 4, 2024, the letters must be dated on or after February 1, 2023). The letters must be issued from customers who have received goods or services from the Vendor or its current corporate officials, on entity/company letterhead, must specify its customer experience with Vendor, and must be signed by an authorized representative of the customer.

   Required Confidentiality Claim Form
   The Required Confidentiality Claim Form must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Required Confidentiality Claim Form. This is the only way for Vendor to assert confidentiality of any information submitted.

   Conflict of Interest Questionnaire – Form CIQ
   Do not upload this form unless you have a reportable conflict with TIPS. There is an Attribute entitled "Conflict of Interest Questionnaire Requirement" immediately followed by an Attribute entitled "Conflict of Interest Questionnaire Requirement – Form CIQ – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Conflict of Interest Questionnaire – Form CIQ must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Conflict of Interest Questionnaire – Form CIQ.

   Disclosure of Lobbying Activities – Standard Form - LLL

Do not upload this form unless Vendor has reportable lobbying activities. There are Attributes entitled, "2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Disclosure of Lobbying Activities – Standard Form - LLL must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to the "Response Attachments" section requesting the Disclosure of Lobbying Activities – Standard Form – LLL.

Current Form W-9
Vendor must upload their current IRS Tax Form W-9. The legal name, EIN, and d/b/a's listed should match the information provided herein exactly. This form will be utilized by TIPS to properly identify your entity.

Certificates & Licenses (Supplemental Vendor Information Only)
Optional. If Vendor would like to display any applicable certificates or licenses (including HUB certificates) for TIPS and TIPS Member Customer consideration, Vendor may upload those at the "Response Attachments" section requesting "Certificates & Licenses (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor's Warranties, Terms, and Conditions (Supplemental Vendor Information Only)
Optional. If Vendor would like to display any standard warranties, terms, or conditions which are often applicable to their offerings for TIPS and TIPS Member Customer consideration, Vendor may upload those at the "Response Attachments" section requesting "Vendor's Warranties, Terms, and Conditions (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Supplemental Vendor Information (Supplemental Vendor Information Only)
Optional. If Vendor would like to display or include any brochures, promotional documents, marketing materials, or other Vendor Information for TIPS and TIPS Member Customer consideration, Vendor may upload those at the "Response Attachments" section requesting "Supplemental Vendor Information (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor Logo (Supplemental Vendor Information Only)
Optional. If Vendor desires that their logo be displayed on their public TIPS profile for TIPS and TIPS Member viewing, Vendor may upload that logo at the "Response Attachments" section requesting "Vendor Logo (Supplemental Vendor Information Only)." These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

IV. SPECIFICATIONS

Category: Elevators and Servicing

Nothing herein is seeking services that are considered architectural and engineering services. This is a solicitation for "public works" construction projects.

Specifications.
It is the intention of TIPS, as a Department of Region 8 ESC, to contract with quality vendors to supply installation and construction of elevators and servicing to public entity and qualifying non-profit TIPS Members in the United States. Proposals shall include, but not be limited to: elevator installation, modernization of elevator systems, elevator construction projects, repair and replacement of elevator shafts and associated equipment, elevator retrofitting, elevator upgrades to meet ADA or other regulatory standards, and associated site work necessary for elevator construction projects. Proposals should include all listings of elevators and servicing installation and construction projects that Vendor seeks to offer under the contract. Do not propose offerings that are not considered elevators and servicing installation and construction projects.

Vendor shall furnish all necessary labor, materials, tools, supplies, equipment, transportation, supervision, management and shall perform all operations necessary and required for the TIPS sale. All work shall be performed in accordance with the requirements set forth in any Supplemental Agreement with a TIPS Member Customer.

ENGINEERING AND ARCHITECTURAL SERVICES
It is impermissible in Texas and some other jurisdictions for engineering and architectural services (A&E) to be procured or provided through an interlocal cooperative contract such as this one. The TIPS Member Customer, if required by law, must engage independent A&E providers according to the laws of their jurisdiction.

V. JOB ORDER CONTRACTING

Texas Government Code § 2269 permits Job Order Contracting as a method of procurement. Job Order Contracting is a solicitation method utilized to obtain competitive, fixed-price, multi-year construction contracts based on established or published unit prices via a unit price book or a price list with a coefficient applied to those unit prices. TIPS utilizes the RS Means Unit Price Book for this purpose. This solicitation is for the sale of installation or construction projects considered a "public work" and whether a sale is classified as a "public work" is within the sole discretion of the purchasing TIPS Member entity based on the scope of work and applicable law.

Job Order Contracting Definitions:

City Cost Index: Is a pricing index published by the Unit Price Book (UPB) allowing the comparison of the national average cost of construction to the cost of the same project in a specific location.

Coefficient: Is the Vendor's coefficient multiplier that is applied to the UPB. It will include all overhead items such as office, safety equipment, vehicles and fuel, computers, communication devises, printers, programs, insurance maintenance, two percent TIPS management fee, final site cleanup and all contingencies.

Job Order: Is a line item estimate taken from a job order proposal using the coefficient and UPB which upon agreement to by the TIPS member becomes a lump sum fixed price contract and a notice to proceed for the stated scope attached to the purchase order.

Job Order Contracting (JOC): Is a variable term indefinite delivery, indefinite quantity contract for construction services on an on-call basis through negotiated line item delivery orders (job orders) to include, under State of Texas law, minor construction, repair, renovation, alterations, and maintenance projects. It is based upon the Vendor's coefficient multiplier that is applied to UPB. When the line items are agreed upon, it becomes a lump sum firm fixed price contract for that negotiated scope of services.

Job Order Proposal: Is Vendor's line-item proposal to the TIPS Member for a specific TIPS project. It will contain a line-item estimate for the project pursuant to the RS Means Price Book and Vendor's applicable coefficients.

Non Pre-priced Items: Items that cannot be found or reasonably compared to listed line items in the applicable UPB. Vendor must provide TIPS with manufacturer documentation reflecting the cost of any non pre-priced item at the time of the TIPS sale so that TIPS can verify that the proposed percentage markup is being honored.

VI. VENDOR PART 2 PRICING SUBMISSION

Required RS Means Price Book Pricing:

Texas Government Code § 2269 permits Job Order Contracting as a method of procurement. Job Order Contracting is a solicitation method utilized to obtain competitive, fixed-price, multi-year construction contracts based on established or published unit prices via a unit price book or a price list with a coefficient applied to those unit prices. TIPS utilizes the RS Means Unit Price Book for this purpose. The RS Means Unit Price Book is a unit price book adjusted for different geographic areas by using the City Cost Index for each location. You may visit https://www.rsmeans.com for more information. TIPS Member Customers often have to designate either Davis Bacon Act wage rates or similar wage rates for their construction contracts. The RS Means Unit Price Book accounts for local wage rates and the contractor must comply with RS Means and any additional wage rate requirements of the TIPS Member Customer.

It is urgent that Vendor understands the coefficients and percentage proposed and can price TIPS sales within those limitation for the duration of Vendor's Contract. In response to the corresponding attribute questions, Vendor must propose: (1) Vendor's Regular Hours RS Means Coefficient; (2) Vendor's After-Hours RS Means Coefficient, and; (3) Vendor's Percentage Markup of Items not Pre-Priced within the RS Means Price Book.

Vendor must correctly and timely respond to the attribute questions within the IonWave eBid System seeking Vendor's RS Means Coefficients and Non Pre-Priced Percentage or Vendor will be disqualified.

Vendor must carefully read the TIPS RS Means JOC Pricing Explanation and Rubric attachment. The TIPS RS Means JOC Pricing Explanation and Rubric attachment may be found under the "Attachments" tab in the IonWave eBid System. It is provided to assist Vendors in responding the required pricing attribute questions seeking Vendor's required RS Means Coefficients and Non Pre-Priced

Percentage. Do not submit pricing questions until you have thoroughly reviewed this explanation and rubric. Do not upload the form as it is informational only.

Vendor's Regular Hours RS Means Coefficient;

To propose the RS Means Price Book pricing exactly, Vendor would insert a 1.0 as their Regular Hours RS Means Coefficient below, to propose a 5% discount off of the RS Means Price Book Vendor would insert a .95 as their Regular Hours RS Means Coefficient below. To see the full scoring rubric and use TIPS scoring calculator, please view the TIPS RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab.

Vendor's After-Hours RS Means Coefficient, and;

The most common After-Hours RS Means Coefficient is "time-and-a-half" of the standard RS Means Unit Price Book. For example, if Vendor's Regular Hours Coefficient above is .95, Vendor would assert an After-Hours RS Means Coefficient of 1.45 for "time-and-a-half" pricing. To see the full scoring rubric and use TIPS scoring calculator, please view the TIPS RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab.

Vendor's Percentage Markup of Items not Pre-Priced within the RS Means Price Book.

If Vendor sells items which cannot be found in the RS Means Price Book, this will be the Percentage Markup at which Vendor agrees to sell those Non Pre-Priced items. This is a maximum Percentage Markup and Vendor may always offer customers a lesser markup. Vendor must provide TIPS with manufacturer documentation reflecting the cost of any non pre-priced item at the time of the TIPS sale so that TIPS can verify that the proposed percentage markup is being honored.

Example: In this example, Vendor is selling a project to a TIPS Member school district and some of the contract pricing for special materials cannot be verified because it cannot be found in the RS Means Price book. Vendor may sell those specialty items to the Member this percentage markup from cost. In this example, if one of the specialty items cost Vendor $100 from the manufacturer and Vendor proposed a Percentage Markup of 30% here, then Vendor could sell the item to the TIPS Customer for $130.00 or less in this example.

Additional Pricing Terms

1. **TIPS Pricing and Line Item Estimate Pricing Requirements.** If awarded on this TIPS Contract, for the duration of the contract, Vendor shall provide a RS Means line-item estimate to TIPS for each anticipated TIPS project or sale. When a TIPS Member Customer seeks a quote or proposal for a TIPS sale, Vendor shall always supply a line-item estimate to TIPS for review and approval.

2. **Maintaining and Updating TIPS Pricing During Contract.** Vendor agrees and understands that for each TIPS Contract that it is awarded, Vendor submitted, agreed to, and received TIPS' approval for specific pricing, discounts, and other pricing terms and incentives which make up Vendor's TIPS Pricing for that TIPS Contract ("TIPS Pricing"). Vendor hereby certifies that Vendor shall only offer goods and services through this TIPS Contract if those goods and services fall within the scope of the TIPS Contract and are priced according to Vendor's TIPS Pricing. TIPS reserves the right to review Vendor's proposals and quotes line-item by line-item to determine compliance. However, Vendor contractually agrees that all TIPS quotes and proposals shall be within the original terms of the Vendor's TIPS Pricing (scope, coefficients, percentage markups, and other pricing terms and incentives originally proposed by Vendor) such that TIPS may approve Vendor's quotes and proposals without additional vetting at TIPS discretion.

3. **Brands.** If a name brand is included in this solicitation, proposals on any reputable manufacturers regularly produced equipment of such items of a similar nature or similar use which are substantively equivalent will be considered.

4. **TIPS Fee Considered.** Vendor confirms that all TIPS Pricing includes the TIPS Administration Fee and Vendor will not show adding the TIPS Administration Fee as a charge or line-item in a TIPS Sale.

5. **Vendor's Self-Imposed Pricing Limitations.** Within Vendor's TIPS Pricing, Vendor may include express, written limitations on geographical regions, volume of order, expediency, etc., for TIPS consideration and approval, as long as Vendor honors their applicable TIPS Pricing, proposed coefficients/percentage markups, the terms and conditions of this Contract, and the

terms and conditions of any Supplemental Agreement entered into directly with the customer TIPS Member. (Example: If Vendor sells nationally but a specific product can only be sold in Texas).

6. **Shipping Cost, Bond Cost, and Taxes.** TIPS fees are not assessed to Vendors for shipping cost, required bond cost, or any taxes that may be applicable as long as they can be identified as separate line-items. For that reason, TIPS encourages Vendors not to include shipping price, bond price, or taxes within the TIPS "catalog pricing" for an item. If it is included in the TIPS price, TIPS will have no way to differentiate and the TIPS Administration fee will be assessed on the total.

VII. PART 2 PROPOSAL SCORING AND EVALUATION

TIPS evaluates and scores all responsive, properly submitted proposals. Recommendations for award will be made to the Region 8 Education Service Center Board of Directors. Awards are ratified or rejected at the monthly meeting of Region 8 ESC Board of Directors, or as delegated by the Board of Directors. TIPS utilizes a value approach and bases its award recommendations on several factors mandated by the Texas Education Code section §44.031 and Texas Government Code §2269. The factors are allotted points as described herein. TIPS reserves the right to assign or deduct any number of points in any given category if warranted due to insufficient response or Vendor stipulated exceptions and limitations. TIPS reserves the right to reject any or all proposals or any part of any proposal. TIPS is the sole arbiter of scoring. TIPS reserves the right to award multiple vendors for each solicitation.

1. **Purchase Price**: **(28) Points.** Vendor must correctly and timely respond to the attribute questions within the IonWave eBid System seeking Vendor's RS Means Coefficients and Non Pre-Priced Percentage or Vendor will be disqualified. Vendor shall submit, pursuant to the instructions included herein: (1) Vendor's Regular Hours RS Means Coefficient; (2) Vendor's After-Hours RS Means Coefficient, and; (3) Vendor's Percentage Markup of Items not Pre-Priced within the RS Means Price Book, which make up Vendor's "TIPS Pricing". Points will be assigned exactly as displayed in the TIPS RS Means JOC Pricing Explanation and Rubric attachment which Vendor is required to review.
2. **Experience: (27) Points.** Points will be assigned based on the number of years proposing Vendor has been operating the proposing business in this capacity as presented in response to the corresponding attribute question seeking the same. <2 years will receive 5-10 points depending on their bonding capacity proposed. If Vendor has <2 years' experience and bonding is less than $100,000.00, Vendor will receive 5 points or less. If Vendor has <2 years' experience and bonding is more than $100,000.00, Vendor will receive 6-10 points. 2-3 years will receive 15 points, 4-5 years will receive 20 points, and > 5 years will receive 27 points.
3. **Reputation of Vendor and Vendor's Offerings: (25) Points.** Points will be assigned based on Vendor's references, to be submitted as instructed herein, reference inquiry response from provided references, and any past history with Vendor, and any other information available to TIPS regarding Vendor's reputation.
4. **Vendor's Financial Capability: (18) Points.** Points will be assigned based on Vendor's bonding capacity letter, to be submitted as instructed herein. Aggregate bonding capacity greater than $2,000,000.00 will receive maximum points. Bonding capacity less than $25,000.00 will receive no points. All other amounts will be scaled accordingly: $25,000 – 5 points; $100,000 – 10 points; $250,000 – 12 points; $500,000 – 14 points; $750,000 – 15 points; $1,000,000 – 16 points; $1,250,000 – 16.5 points; $1,500,000 – 17 points; $1,750,000 – 17.5 points; $2,000,000 – 18 points.
5. **Impact on the Ability of TIPS Members to Comply with Laws and Rules Relating to Historically Underutilized Businesses ("HUB's"): (2) Points.** Points are assigned if, where applicable herein, Vendor agrees that if they anticipate subcontracting under this award, they will abide by the required affirmative steps provided in 2 CFR 200. Please see the corresponding Attribute Questions regarding, "Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms." A response that Vendor does anticipate subcontracting but does not agree to the federal subcontracting practices will give Vendor 0 points for this category and deem Vendor unacceptable to receive federal funds under this contract, any other responses accurate responses will give Vendor 2 points for this category.
6. **Residency: 0 Points.** For a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner: A. has its principal place of business in this state; or B. employs at least 500 persons in this state. Vendor's response to the corresponding attribute question will be considered, as required by law, but no points shall be assigned because federal funds may be utilized by TIPS Members, and residency is a prohibited criterion under federal regulation.

PROPOSERS FALLING BELOW AN 70-POINT THRESHOLD WILL NOT BE CONSIDERED FOR AN AWARD.

VIII. TERMS & CONDITIONS

1. **Incorporation of Solicitation.** As previously stated, if Vendor proposes and is awarded, the specifications, terms, and conditions of this solicitation shall be incorporated by reference into the final, awarded TIPS Contract. In the event of conflict between the terms herein and the final Vendor Agreement, the terms and conditions which are in the best interest of governmental/qualifying non-profit TIPS Members shall control at TIPS sole discretion.

2. **Deviations.** If Vendor has proposed deviations to TIPS' standard terms, there is an Attribute Question where Vendor can assert that it has proposed negotiations. If Vendor responds to that attribute question asserting deviations, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document Vendor Agreement and instruct Vendor to include all requested negotiations as redline edits for TIPS consideration. This is the only proper way to submit proposed deviations for TIPS consideration. TIPS reserves the right to accept, decline, or modify Vendor's requested negotiated terms. For this reason, asserting deviations or negotiations may ultimately delay or prevent award.

3. **Term of the Agreement.** If awarded, the resulting Agreement with TIPS is for approximately two years with an option for renewal for an additional two consecutive one-year terms. The first renewal year shall be automatic unless Vendor notifies TIPS of its objection to the first one-year renewal. The second one-year renewal shall only be effective if offered by TIPS at its sole discretion. If TIPS offers the second renewal option, the Vendor will be notified via email issued to Vendor's then-listed Primary Contact. The renewal option shall be deemed accepted by Vendor unless Vendor notifies TIPS of its objection to the renewal option in writing and confirms receipt by TIPS.

   Actual Effective Date: Agreement is effective upon signature by authorized representatives of both Parties. The Effective Date does not affect the "Term Calculation Start Date."

   Term Calculation Start Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, Vendor shall calculate the foregoing term as starting on the last day of the month that "Award Notifications" are anticipated as published in the Solicitation, regardless of the actual Effective Date.

   Example of Term Calculation Start Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 in this example.

   Contract Expiration Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, the term expiration date shall be two-years from the Term Calculation Start Date.

   Example of Contract Expiration Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 and the Contract Expiration Date of the resulting initial "two-year" term, (which is subject to an extension(s)) will be May 31, 2025 in this example.

   Option(s) for Renewal: Any option(s) for renewal shall begin on the Contract Expiration Date, or the date of the expiration of the prior renewal term where applicable, and continue for the duration specified for the renewal option herein.

   Example of Option(s) for Renewal: In this example, if TIPS offers the second one-year renewal, and the Contract Expiration Date following the first automatic renewal is May 31, 2026, then the one-year renewal is effective from May 31, 2026 to May 31, 2027.

   TIPS may offer to extend Vendor Agreements to the fullest extent the TIPS Solicitation resulting in this Agreement permits.

4. **Termination.** If awarded, TIPS reserves the right to terminate the resulting agreement for cause or no cause for convenience with a thirty (30) days prior written notice. This Agreement may be terminated for cause by either party if the other party breaches the terms or materially defaults on the performance of any of its duties or obligations set forth herein ,provided that such default is not cured within thirty (30) days, or as otherwise may be agreed to by both parties, after written notice is given to the defaulting party by the non-defaulting party which specifies the faulty performance and acceptable means of correction. In such event, termination of the Agreement shall be effective as of the date specified in such notice of such termination. Upon termination, all TIPS Sale orders previously accepted by Vendor shall be fulfilled and Vendor shall be paid for all TIPS Sales executed pursuant to the applicable terms. All TIPS Sale orders presented to Vendor but not fulfilled by Vendor, prior to the actual termination of this agreement shall be honored at the option of the TIPS Member. TIPS shall submit to Vendor an invoice for any outstanding TIPS Administration Fees and approved expenses and Vendor shall pay such fees and expenses within 30

calendar days of receipt of such valid TIPS invoice. Vendor acknowledges and agrees that continued participation in TIPS is subject to TIPS' sole discretion and that any Vendor may be removed from the TIPS program at any time with or without cause. This termination clause does not affect TIPS Sales Supplemental Agreements pursuant to this term regarding termination and the Survival Clause term.

5. **TIPS Pricing.** Vendor agrees and understands that for each TIPS Contract that it holds, Vendor submitted, agreed to, and received TIPS' approval for specific pricing, discounts, and other pricing terms and incentives which make up Vendor's TIPS Pricing for that TIPS Contract ("TIPS Pricing"). Vendor confirms that Vendor will not add the TIPS Administration Fee as a charge or line-item in a TIPS Sale. Vendor hereby certifies that Vendor shall only offer goods and services through this TIPS Contract if those goods and services are included in or added to Vendor's TIPS Pricing and approved by TIPS. TIPS reserves the right to review Vendor's pricing update requests as specifically as line-item by line-item to determine compliance. However, Vendor contractually agrees that all submitted pricing updates shall be within the original terms of the Vendor's TIPS Pricing (scope, proposed discounts, price increase limitations, and other pricing terms and incentives originally proposed by Vendor) such that TIPS may accept Vendors price increase requests as submitted without additional vetting at TIPS discretion. Any pricing quoted by Vendor to a TIPS Member or on a TIPS Quote shall never exceed Vendor's TIPS Pricing for any good or service offered through TIPS. Vendor certifies by signing this agreement that Vendor's TIPS Pricing for all goods and services included in Vendor's TIPS Pricing shall either be equal to or less than Vendor's current pricing for that good or service for any other customer. TIPS Pricing price increases and modifications, if permitted, will be honored according to the terms of the solicitation and Vendor's proposal, incorporated herein by reference.

6. **Initiation of TIPS Sales.** If awarded, when a public entity initiates a purchase with Vendor under this resulting contract, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Once verified, Vendor must include the TIPS Contract Number on all purchase communications and sales documents exchanged with the TIPS Member.

7. **TIPS Sales and Supplemental Agreements.** If awarded, when making a sale under this awarded contract, the terms of the specific TIPS order, including but not limited to: shipping, freight, insurance, delivery, fees, bonding, cost, delivery expectations and location, returns, refunds, terms, conditions, cancellations, defects, order assistance, etc., shall be controlled by the purchase agreement (Purchase Order, Contract, AIA Contract, Invoice, etc.) ("Supplemental Agreement" as used herein) entered into between the TIPS Member Customer and Vendor only. TIPS is not a party to any Supplemental Agreement. All Supplemental Agreements shall include Vendor's Name, as known to TIPS, and TIPS Contract Name and Number. Vendor accepts and understands that TIPS is not a legal party to TIPS Sales and Vendor is solely responsible for identifying fraud, mistakes, unacceptable terms, or misrepresentations for the specific order prior to accepting. Vendor agrees that any order issued from a customer to Vendor, even when processed through TIPS, constitutes a legal contract between the customer and Vendor only. When Vendor accepts or fulfills an order, even when processed through TIPS Vendor is representing that Vendor has carefully reviewed the order for legality, authenticity, and accuracy and TIPS shall not be liable or responsible for the same. In the event of a conflict between the terms of this TIPS Vendor Agreement document and those contained in any attachment, the provisions set forth herein shall control unless otherwise agreed to by the Parties in writing. The Supplemental Agreement shall dictate the scope of services, the project delivery expectations, the scheduling of projects and milestones, the support requirements, and all other terms applicable to the specific sale(s) between the Vendor and the TIPS Member.

8. **Payment for TIPS Sales.** TIPS Members may make payments for TIPS Sales directly to Vendor, or as otherwise agreed to in the applicable Supplemental Agreement after receipt of the invoice and in compliance with applicable payment statutes. Regardless of how payment is issued or received for a TIPS Sale. Vendor is responsible for all reporting and TIPS Administration Fee payment requirements as required by the TIPS Contract.

9. **Right of Refusal.** If awarded, Vendor has the right not to sell to a TIPS Member under the awarded agreement at Vendor's discretion unless otherwise required by law.

10. **Reporting TIPS Sales**. If awarded on this TIPS Contract, for the duration of the contract, Vendor shall provide a RS Means line-item estimates to TIPS for each anticipated TIPS project or sale. When a TIPS Member Customer seeks a quote or proposal for a TIPS sale, Vendor shall always supply a line-item estimate to TIPS for review and approval. If awarded, Vendor must report all TIPS Sales to TIPS. If a TIPS sale is initiated by Vendor receiving a TIPS Member's purchase order from TIPS directly, Vendor may consider that specific TIPS Sale reported. Otherwise, with the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the line item quote and purchase order or similar purchase document (with Vendor's Name, as known to TIPS, and the TIPS Contract Name and Number included) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being

accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion. Please refer to the TIPS Accounting FAQ's for more information about reporting sales and if you have further questions, contact the Accounting Team at accounting@tips-usa.com.

11. **TIPS Administration Fees.** The collection of administrative fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The administration fee ("TIPS Administration Fee") is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of the amount paid by the TIPS Member for each TIPS Sale, less shipping cost, bond cost, and taxes if applicable and identifiable, which is legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published herein. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member, not on the Vendor's cost or on the amount for which the Vendor sold the item to a dealer or Authorized Reseller. Upon receipt of payment for a TIPS Sale, including partial payment (which renders TIPS Administration Fees immediately due), Vendor shall issue to TIPS the corresponding TIPS Administration Fee payment as soon as possible but not later than thirty-one calendar days following Vendor's receipt of payment. Vendor shall pay TIPS via check unless otherwise agreed to by the Parties in writing. Vendor shall include clear documentation with the issued payment dictating to which sale(s) the amount should be applied. Vendor may create a payment report within their TIPS Vendor Portal which is the preferred documentation dictating to which TIPS Sale(s) the amount should be applied. Failure to pay all TIPS Administration Fees pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion as well as the initiation of collection and legal actions by TIPS against Vendor to the extent permitted by law. Any overpayment of participation fees to TIPS by Vendor will be refunded to the Vendor within ninety (90) days of receipt of notification if TIPS receives written notification of the overpayment not later than the expiration of six (6) months from the date of overpayment and TIPS determines that the amount was not legally due to TIPS pursuant to this agreement and applicable law. Any notification of overpayment received by TIPS after the expiration of six (6) months from the date that TIPS received the payment will render the overpayment non-refundable. Region 8 ESC and TIPS reserve the right to extend the six (6) month deadline if approved by the Region 8 ESC Board of Directors. TIPS reserves all rights under the law to collect TIPS Administration Fees due to TIPS pursuant to this Agreement.

12. **Confidentiality of Vendor Data.** Vendor understands and agrees that by signing this Agreement, all Vendor Data is hereby released to TIPS, TIPS Members, and TIPS third-party administrators to effectuate Vendor's TIPS Contract except as provided for herein. The Parties agree that Vendor Data is accessible by all TIPS Members as if submitted directly to that TIPS Member Customer for purchase consideration. If Vendor otherwise considers any portion of Vendor's Data to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code (the "Public Information Act") or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form which is required to be submitted as part of Vendor's proposal resulting in this Agreement and incorporated by reference. The Confidentiality Claim Form included in Vendor's proposal and incorporated herein by reference is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a Public Information Request. If TIPS receives a request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor Data deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law, including Attorney General determination and opinion. In the event that TIPS receives a written request for information pursuant to the Public Information Act that affects Vendor's interest in any information or data furnished to TIPS by Vendor, and TIPS requests an opinion from the Attorney General, Vendor may, at its own option and expense, prepare comments and submit information directly to the Attorney General stating why the requested information is exempt from disclosure pursuant to the requirements of the Public Information Act. Vendor is solely responsible for submitting the memorandum brief and information to the Attorney General within the time period prescribed by the Public Information Act. Notwithstanding any other information provided in this solicitation or Vendor designation of certain Vendor Data as confidential or proprietary, Vendor's acceptance of this TIPS Vendor Agreement constitutes Vendor's consent to the disclosure of Vendor's Data, including any information deemed confidential or proprietary, to TIPS Members or as ordered by a Court or government agency, including without limitation the Texas Attorney General. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation by TIPS Members or as required by law.

13. **Conflicts of Interest.** Vendor confirms that they have not offered, given, or accepted, nor intend to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, service to the other in connection with this Agreement. Vendor affirms that, to the best of Vendor's knowledge, its proposal has been arrived at

independently, and is awarded without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this Agreement. Vendor agrees that it will/has disclosed any necessary affiliations with Region 8 Education Service Center and the TIPS Department, if any, through the Conflict of Interest attachment provided in the solicitation.

14. **Volume of TIPS Sales.** Nothing in this Agreement or any TIPS communication may be construed as a guarantee that TIPS or TIPS Members will submit any TIPS orders to Vendor at any time.

15. **Exclusivity.** Any award under this solicitation is non-exclusive and TIPS reserves the right to award multiple vendors or not award any vendors. TIPS reserves the right to re-issue a solicitation or solicit the same or similar solicitation categories for additional similar awards at any time at TIPS sole discretion.

16. **Best and Final Offer.** Vendor's proposal shall be their best and final offer although deviations may be addressed and Vendor's TIPS Pricing may be updated as provided for herein.

17. **LIMITATION OF LIABILITY – Waiver.** BY SUBMITTING A PROPOSAL, OFFERER EXPRESSLY AGREES TO WAIVE ANY CLAIM IT HAS OR MAY HAVE AGAINST BOTH THE INTERLOCAL PURCHASING SYSTEM REGION 8 EDUCATION SERVICE CENTER, ITS DIRECTORS, OFFICERS, ITS TRUSTEES, OR AGENTS ARISING OUT OF OR IN CONNECTION WITH (1) THE ADMINISTRATION, EVALUATION, RECOMMENDATION OF ANY PROPOSAL; (2) ANY REQUIREMENTS UNDER THE SOLICITATION, PROPOSAL PACKAGE, OR RELATED DOCUMENTS; (3) THE REJECTION OF ANY PROPOSAL OR ANY PART OF ANY PROPOSAL; AND/OR (4) THE AWARD OF AN AGREEMENT, IF ANY. NEITHER REGION 8 ESC NOR TIPS SHALL BE RESPONSIBLE OR LIABLE FOR ANY COSTS INCURRED BY PROPOSERS OR THE SELECTED CONTRACTOR IN CONNECTION WITH RESPONDING TO THE SOLICITATION, PREPARING FOR ORAL PRESENTATIONS, PREPARING AND SUBMITTING A PROPOSAL, ENTERING OR NEGOTIATING THE TERMS OF AN AGREEMENT, OR ANY OTHER EXPENSES INCURRED BY A PROPOSER. THE PROPOSER OR SELECTED CONTRACTOR IS WHOLLY RESPONSIBLE FOR ANY SUCH COSTS AND EXPENSES AND SHALL NOT BE REIMBURSED IN ANY MANNER BY REGION 8 ESC OR TIPS.

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477 • tips@tips-usa.com

April 22, 2025

The Advocate
C/O Legal Notices (Martinisha Singleton)

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

CAPITAL CITY PRESS

Publisher of
THE ADVOCATE

PROOF OF PUBLICATION

The hereto attached notice was published in THE ADVOCATE, a daily newspaper of general circulation published in Baton Rouge, Louisiana, and the Official Journal of the State of Louisiana, City of Baton Rouge, and Parish of East Baton Rouge or published daily in THE TIMES-PICAYUNE/THE NEW ORLEANS ADVOCATE, in New Orleans Louisiana or published daily in THE ACADIANA ADVOCATE in the following issues:

5/1/2025, 5/8/2025

Joy Newman, Public Notices Representative

Sworn and subscribed before me, by the person whose signature appears above

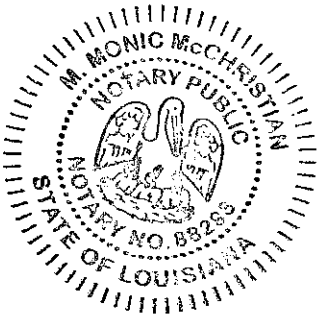
14 May 2025

M. Monic McChristian,

Notary Public ID#88293

State of Louisiana

My Commission Expires: Indefinite



Ad No: 137984

Brooke Scott - TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686

Legal Notices

tions, please contact Integral Development at 404-224-1860.

138667-apr 30-may 2-3t
$629.98

PUBLIC NOTICE
- - -

Project: Wooddale Tower
Project Owner: Woodale Tower LLC
Project Address: 1885 Wooddale Blvd., Baton Rouge, LA 70806
Total Units: 88 Units (11 Efficiency, 66 One-Bedroom, 11 Two Bedrooms)
Project Contact: Michael Tubre
Phone Number: 504-373-5107

The project owner is making an application for the competitive 9% Low-Income Tax Credits (LIHTC) with the Louisiana Housing Corporation. Wooddale Tower is located at 1885 Wooddale Blvd., Baton Rouge, LA 70806. The project will have a maximum of 88 elderly only efficiency, one bedroom/one bath and two bedroom/one bath newly constructed multi-family housing units. Community facilities will be available in the project. The total development cost is $24,943,483 and will consist of $12,323,034.90 in LIHTC equity proceeds, $9,161,740.57 in State and Federal Historic Tax Credit Equity proceeds, $4,000,000 in a Non-LHC Loan.

138973-may 1-3-3t
$393.73

PUBLIC NOTICE

Public Hearings will be held at Zachary City Hall 4700 Main St. during a regular meeting of the Planning and Zoning Commission meeting-Monday, May 5, 2025 – 6:00 pm and the City Council meeting - Tuesday – May 27, 2025-6:30 pm for the purpose indicated:

Site Plan — Sherwood Park 5300-5400 Lower Zachary Road

139092 May 1, 2, 3, 3t
$45.37

PUBLIC NOTICE

Public Hearings will be held at Zachary City Hall 4700 Main St. during a regular meeting of the Planning and Zoning Commission meeting-Monday, May 5, 2025 – 6:00 pm and the City Council meeting - Tuesday – May 27, 2025-6:30 pm for the purpose indicated:

Site Plan — ABCO Holdings Group 20630 Plank Road

139097 May 1, 2, 3, 3t
$44.38

PUBLIC NOTICE

Public Hearings will be held at Zachary City Hall 4700 Main St. during a regular meeting of the Planning and Zoning Commission meeting-Monday, May 5, 2025 – 6:00 pm and the City Council meeting - Tuesday – May 27, 2025-6:30 pm for the purpose indicated:

Final Plat – Zachary Trails, Phase I 21511 Old Scenic Highway

139102 May 1, 2, 3, 3t
$45.37

PUBLIC NOTICE
- - -

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at **www.tips-usa.com** for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

137984 May 1, 8, 2t
$214.68

PUBLIC NOTICE
- - -

TOWN OF ADDIS

PUBLIC HEARING NOTICE

REQUEST FOR REZONING

FIRST BAPTIST CHURCH OF ADDIS HAS FILED AN APPLICATION FOR REZONING OF PROPERTY LOCATED OFF OF HIGHWAY 1 SOUTH IN ADDIS NEAR 7126 HWY 1 SOUTH – WEST OF THE RAILROAD CROSSING.
LEGAL DESCRIPTION: 36.642 AC M/L SEC 25 26 67 & 68 T8S R12E LESS PORTION SUBD 47-100A (MB8 P264) WEST BATON ROUGE PARISH, ADDIS, LOUISIANA.

REQUESTING REZONING FROM AGRICULTURAL - 1 TO COMMERCIAL - 2.

THE TOWN OF ADDIS PLANNING AND ZONING COMMISSION WILL HOLD A PUBLIC HEARING ON THIS REQUEST ON TUESDAY, MAY 06, 2025 AT 6:00 P.M. AT THE ADDIS MUNICIPAL CENTER.

THE TOWN OF ADDIS' MAYOR AND TOWN COUNCIL WILL HOLD A PUBLIC HEARING ON THIS REQUEST ON TUESDAY, MAY 13, 2025 AT 6:00 P.M. AT THE ADDIS MUNICIPAL CENTER.

ALL INTERESTED PARTIES ARE INVITED TO COMMENT AND EXPRESS THEIR VIEWS ON THIS REQUESTED CHANGE IN ZONING.

ROBERT HEBERT
CHAIRPERSON – PLANNING & ZONING

DAVID H. TOUPS
MAYOR – TOWN OF ADDIS

PUBLISH 3 TIMES: APRIL 17, 2025, APRIL 24, 2025, MAY 01, 2025

136126 April 17, 24, May 1, 3t
$69.88

PUBLIC NOTICE
- - -

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM OR LIMITATION OF LIABILITY

CIVIL ACTION NO. 25-630

SECTION

JUDGE

MAG. JUDGE

NOTICE OF ACTION

Legal Notices

BROUGHT FOR EXONERATION FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving the M/V DIXIE LEE EYMARD which occurred on or about September 22, 2024 when it is alleged that Dwayne Johnlouis sustained injuries while working aboard a barge being moved by the M/V DIXIE LEE EYMARD.

All persons having such claims must file them as provided in the Federal Rules of Civil Procedure, Supplemental Rule F, with the Clerk of this Court, at the United States Courthouse, 500 Poydras Street, New Orleans, Louisiana, 70130 and serve copies on or mail copies to Complainant's attorneys, Mouledoux, Bland, Legrand & Brackett, attention: Michael Neuner, 701 Poydras Street, Suite 600, New Orleans, Louisiana 70139, on or before the ____ day of ________, 2025, or be defaulted. Personal attendance is not required.

Any claimant desiring to contest the right of Complainant to exoneration from liability or the right of Complainant to limitation of liability must file an answer to said Complaint, as required by the aforesaid Supplemental Rule F, and must serve on or mail to Complainant's attorneys a copy thereof, unless his claim has included an answer.

New Orleans, Louisiana, this ___ day of ____________, 2025.

UNITED STATES DISTRICT JUDGE

136387 April 17, 24, May 1, 8, 4t
$1,006.64

PUBLIC NOTICE
- - -

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM OR LIMITATION OF LIABILITY

CIVIL ACTION NO.

SECTION

JUDGE

MAG. JUDGE

NOTICE OF ACTION BROUGHT FOR EXONERATION FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving the M/V DIXIE LEE EYMARD which occurred on or about September 15, 2024 when it is alleged that Austin Landry sustained a leg injury while working aboard a barge being moved by the M/V DIXIE LEE EYMARD.

All persons having such claims must file them as provided in the Federal Rules of Civil Procedure, Supplemental Rule F, with the Clerk of this Court, at the United States Courthouse, 500 Poydras Street, New Orleans, Louisiana, 70130 and serve copies on or mail copies to Complainant's attorneys, Mouledoux, Bland, Legrand & Brackett, attention: Michael Neuner, 701 Poydras Street, Suite 600, New Orleans, Louisiana 70139, on or before the ____ day of ________, 2025, or be defaulted. Personal attendance is not required.

Any claimant desiring to contest the right of Complainant to exoneration from liability or the right of Complainant to limitation of liability must file an answer to said Complaint, as required by the aforesaid Supplemental Rule F, and must serve on or mail to Complainant's attorneys a copy thereof, unless his claim has included an answer.

New Orleans, Louisiana, this ___ day of ____________, 2025.

UNITED STATES DISTRICT JUDGE

136244 April 17, 24, May 1, 8, 4t
$1006.64

Public Notices Meet/Hear/Min

PUBLIC NOTICE

The Louisiana Department of Environmental Quality announces the following date for the meeting of the Louisiana Motor Fuels Underground Storage Tank Trust Fund Advisory Board:

Thursday, June 5, 2025
1:00 P.M.

The meeting will be conducted in the Galvez Building, 602 North Fifth Street, Baton Rouge, Louisiana 70802, in the Oliver Pollock room (Room # C-111).

Questions regarding the meeting can be directed to Ms. Danielle McCarty, Environmental Project Coordinator, at (225) 219-3541 or via email at Danielle.McCarty@la.gov.

139088 May 1, 1t
$33.62

Public Notices Nat Res Coastal

PUBLIC NOTICE
- - -

NOTICE the La. Dept. of Energy and Natural Resources, Office of Coastal Management (OCM) has received the following application(s) for a Coastal Use Permit (CUP) in accordance with the State and Local Coastal Resources Management Act of 1978, as amended, (La. R.S. 49:214.21-214.41), and the rules and regulations of the Coastal Resources Program. Applications for the proposed work may be inspected at 617 North 3rd Street, Room 1078, Baton Rouge, LA or on the OCM web page at: http://dnr.louisiana.gov/index.cfm?md=pagebuilder&tmp=home&pid=591. Copies may be obtained upon payment of cost of copying. Written comments, including suggestions for modifications or objections to the proposed work and stating the reasons thereof, are being solicited from the public. Comments must be received within 25 days of the date of publication of this notice. Comments should be uploaded to our electronic record, but may be mailed or emailed to the designated OCM Reviewer. All comments must contain the appropriate application number and the commenter's full name and contact information. Any person may request, in writing, within the comment period specified in this notice, that a State or Federal public hearing be held to consider this application. Requests for public hearings shall state, with particularity, the reasons for holding a public hearing and must contain the name and contact information of the requester. Below are the referenced application(s):
*********OCM; P. O. Box 44487, Baton Rouge, LA 70804-4487; Phone: (225) 342-9083; Email: melissa.sherman2@la.gov; OCM Reviewer: Melissa Sherman; **CUP NUMBER: P20250286** Name: Restoration Systems, Llc c/o Natural Resource Professionals, Llc 7330 Highland Road Suite B-1 Baton Rouge, LA 70808 Attn: Gregg Fell Location: Plaquemines Parish, LA; Lat 29-44-29.84N, Long 90-2-19.64W; Section 24 T15S R24E; Jesuit Bend Belle Chasse, 70037 Description: Proposed construction and maintenance of earthen berms at 4 hydrologic conveyance locations, and the construction and maintenance of fencing at 3 hydrologic conveyance locations. The purpose of the project is to minimize/prevent water hyacinth from entering existing shallow open water / unvegetated areas of the Jesuit Bend Mitigation Bank. Approx. 364.55 cy of material will be excavated and placed onsite.

139180 May 1, 1t
$30.35

Public Notices Successions

PUBLIC NOTICE
- - -

IN THE MATTER OF

THE SUCCESSION OF

OUIDA MAE LOCKWOOD SWENSON

NO. P-98316 DIV. 25

19TH JUDICIAL DISTRICT COURT

PARISH OF EAST BATON ROUGE

STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF OUIDA MAE LOCKWOOD SWENSON has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of SEVEN HUNDRED NINETY-FIVE THOUSAND AND NO/100 DOLLARS ($795,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:
One certain lot or parcel of ground, together with all the buildings and improvements thereon, and with all of the rights, ways, privileges, servitudes and appurtenances thereunto belonging, or in anywise appertaining, situated in the Parish of East Baton Rouge, State of Louisiana, in Sections 63 and 64, T8S, RIE, and being designated as LOT KK-13 as show on map prepared by R. L. Bennett, Registered Land Surveyor, dated May 6, 1977, and being entitled "Final Plat Kenilworth Way Map Showing the Resubdivision of a Portion of the Kenilworth Prop., Inc. Property Located in Sec. 63 & 64, T-8-S, R-I-E, East Baton Rouge Parish, Louisiana for Richard McDowell", a copy of said map being on file and of record in the office of the Clerk and Recorder for East Baton Rouge Parish in Map Book 169, page 355, said LOT KK-13 measuring Two Hundred Forty-six and 99/100 (246,99) feet front on Kenilworth Parkway by a depth on its southerly sideline along Highland Road of Two Hundred Six and 90/100 (206.90) feet, a depth on its northerly sideline of One Hundred Forty-two and 63/100 (142.63) feet, and measuring Two Hundred Fifty-seven and 38/100 (257.38) feet across its rear; subject to a Seven and 5/10 (7.5) foot servitude across the rear and a Five (5) foot sidewalk servitude across the front. Being the same property acquired by Wayne Douglas Swenson, Sr. and Ouida Mae Lockwood Swenson by act dated June 28, 1977 and recorded as Original 362, Bundle 9218.

The property herein is presently designated by the municipal number 120 Kenilworth Parkway, Baton Rouge, Louisiana 70808.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.
DOUG WELBORN
CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE
ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

139010-may 1-21-2t
$130.22

PUBLIC NOTICE
- - -

IN THE MATTER OF

THE SUCCESSION OF

OUIDA MAE LOCKWOOD SWENSON

NO. P-98316 DIV. 25

19TH JUDICIAL DISTRICT COURT

PARISH OF EAST BATON ROUGE

STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF OUIDA MAE LOCKWOOD SWENSON has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of FIFTY THOUSAND AND NO/100 DOLLARS ($50,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:
One (1) certain lot or parcel of ground, together with all buildings and improvements thereon and all of the rights, way, privileges, servitudes, appurtenances and advantages thereunto belonging or in anywise appertaining, situation in that subdivision in the City of Baton Rouge, Parish of East Baton Rouge, State of Louisiana, known as BUFFINGTON HEIGHTS, and being designated on a Map showing the resubdivision of Lots 6, 7, and 8, Buffington Heights in the City of Baton Rouge, Louisiana, for B.E. Perkins, Baton Rouge, Louisiana, January 17, 1964, recorded in the Office of the Clerk and Recorder of the aforesaid Parish and State on January 22, 1964, and Original 59, Bundle 5525, as LOT SIX-A (6A), said Lot 6A measuring sixty-five and 5/10 (65.5') feet front on the west side of Live Oak Boulevard by a depth between parallel and equal lines of one hundred two (102') feet, all as shown on said map.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.
DOUG WELBORN
CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE
ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

139013-may 1-21-2t
$107.98

PUBLIC NOTICE
- - -

IN THE MATTER OF THE SUCCESSION OF WAYNE DOUGLAS SWENSON, SR.

NO. P-98315 DIV. 25

19TH JUDICIAL DISTRICT COURT PARISH OF EAST BATON ROUGE STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF WAYNE DOUGLAS SWENSON, SR. has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of FIFTY THOUSAND AND NO/100 DOLLARS ($50,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:

One (1) certain lot or parcel of ground, together with all buildings and improvements thereon and all of the rights, way, privileges, servitudes, appurtenances and advantages thereunto belonging or in anywise appertaining, situation in that subdivision in the City of Baton Rouge, Parish of East Baton Rouge, State of Louisiana, known as BUFFINGTON HEIGHTS, and being designated on a Map showing the resubdivision of Lots 6, 7, and 8, Buffington Heights in the City of Baton Rouge, Louisiana, for B.E. Perkins, Baton Rouge, Louisiana, January 17, 1964, recorded in the Office of the Clerk and Recorder of the aforesaid Parish and State on January 22, 1964, and Original 59, Bundle 5525, as LOT SIX-A (6A), said Lot 6A measuring sixty-five and 5/10 (65.5') feet front on the west side of Live Oak Boulevard by a depth between parallel and equal lines of one hundred two (102') feet, all as shown on said map.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.

DOUG WELBORN CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE

ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

138993-may 1-21-2t
$106.64

PUBLIC NOTICE
- - -

IN THE MATTER OF THE SUCCESSION OF WAYNE DOUGLAS SWENSON, SR.

NO. P-98315 DIV. 25

19TH JUDICIAL DISTRICT COURT PARISH OF EAST BATON ROUGE STATE OF LOUISIANA

NOTICE OF APPLICATION FOR AUTHORITY TO SELL IMMOVABLE PROPERTY AT PRIVATE SALE

NOTICE IS GIVEN that CYNTHIA LOUSTEAU, Testamentary Executrix of the SUCCESSION OF WAYNE DOUGLAS SWENSON, SR. has, pursuant to the provisions of the Louisiana Code of Civil Procedure, article 3281, petitioned this Honorable Court for authority to sell at private sale, for the price of SEVEN HUNDRED NINETY-FIVE THOUSAND AND NO/100 DOLLARS ($795,000.00), the Succession's undivided one-half (1/2) interest in and to the following described property:
One certain lot or parcel of ground, together with all the buildings and improvements thereon, and with all of the rights, ways, privileges, servitudes and appurtenances thereunto belonging, or in anywise appertaining, situated in the Parish of East Baton Rouge, State of Louisiana, in Sections 63 and 64, T8S, RIE, and being designated as LOT KK-13 as show on map prepared by R. L. Bennett, Registered Land Surveyor, dated May 6, 1977, and being entitled "Final Plat Kenilworth Way Map Showing the Resubdivision of a Portion of the Kenilworth Prop., Inc. Property Located in Sec. 63 & 64, T-8-S, R-I-E, East Baton Rouge Parish, Louisiana for Richard McDowell", a copy of said map being on file and of record in the office of the Clerk and Recorder for East Baton Rouge Parish in Map Book 169, page 355, said LOT KK-13 measuring Two Hundred Forty-six and 99/100 (246,99) feet front on Kenilworth Parkway by a depth on its southerly sideline along Highland Road of Two Hundred Six and 90/100 (206.90) feet, a depth on its northerly sideline of One Hundred Forty-two and 63/100 (142.63) feet, and measuring Two Hundred Fifty-seven and 38/100 (257.38) feet across its rear; subject to a Seven and 5/10 (7.5) foot servitude across the rear and a Five (5) foot sidewalk servitude across the front. Being the same property acquired by Wayne Douglas Swenson, Sr. and Ouida Mae Lockwood Swenson by act dated June 28, 1977 and recorded as Original 362, Bundle 9218.
The property herein is presently designated by the municipal number 120 Kenilworth Parkway, Baton Rouge, Louisiana 70808.

NOW THEREFORE, in accordance with law, notice is hereby given that CYNTHIA LOUSTEAU, Testamentary Executrix, proposes to sell the aforesaid immovable property, at private sale, for the price and upon the terms aforesaid, and the heirs, legatees, and creditors are required to make opposition, if any they have or can, to such sale, within seven (7) days, including Sundays and holidays, from date whereon the last publication of this notice appears.

DALE ATKINS CLERK OF COURT
19th JUDICIAL DISTRICT COURT
FOR THE PARISH OF EAST BATON ROUGE

ATTORNEY: Erin Pedrami
PUBLICATION: The Advocate newspaper once, then again 21 days later
ADDRESS: Pedrami Law Firm, LLC
4021 W. E. Heck Ct., Suite E-2, Baton Rouge, LA 70816
TELEPHONE: (225) 245-9800

139006-may 1-21-2t
$127.52

WBR Public Notices

WBR Public Notices Meet/Hear/Min

PUBLIC NOTICE
- - -

NOTICE

The dates of the West Baton Rouge Parish School Board Committee meeting and regular board meeting for May are listed below:

Committee Meeting/s:
Tuesday, May 13, 2025
Location:
3761 Rosedale Road
Port Allen, LA 70767

Regular Board Meeting:
Wednesday, May 21, 2025
Location:
Cohn Elementary
Multi-purpose Building
805 N. 14th Street
Port Allen, LA 70767

G. Alden Chustz Jr.
President
West Baton Rouge
School Board

Publish Dates:
April 24, 2025
May 1, 2025
May 8, 2025
May 15, 2025

137454 April 24, May 1, 8, 15, 4t
$51.44

WBR Public Notices Sheriff Sales

SHERIFF'S SALE

SUIT NO. 49779

FEDERAL HOME LOAN MORTGAGE CORPORATION VS SHARON ANN PRATT

18TH JUDICIAL DISTRICT COURT PARISH OF WEST BATON ROUGE STATE OF LOUISIANA

SUIT NO. 49779

BY VIRTUE OF A WRIT OF SEIZURE AND SALE TO ME, DIRECTED BY THE HONORABLE THE EIGHTEENTH JUDICIAL DISTRICT COURT, FOR THE PARISH OF WEST BATON ROUGE, IN THE ABOVE ENTITLED CAUSE, I WILL PROCEED TO SELL BY PUBLIC AUCTION, IN FRONT OF THE COURTHOUSE DOOR, ON THE 4TH DAY OF JUNE, 2025 AT TEN O'CLOCK (10:00) A.M., THE FOLLOWING DESCRIBED PROPERTY:

A certain lot or parcel of ground, together with all of the buildings and improvements thereon being and belonging and with all the rights, ways, privileges, and servitudes, thereunto appertaining, situated in the Westriver Subdivision near the Town of Addis, Parish of West Baton Rouge, Louisiana, and designated on map of said subdivision prepared by A. J. Parker, C.E., on October 6, 1956, and recorded on Page 69 of the map book of the Parish of West Baton Rouge as Lot 167. This lot measures 100 feet front on Myrle Drive, by a depth between parallel lines of 120 feet, and is bounded on the North by Myrle Drive, on the East by Sybil Street, on the South by Lot 172 and on the West by Lot 168. See C.B. 130, E. 208; C.B. 114, E. 53 of the conveyance records of West Baton Rouge, Louisiana

MUNICIPAL ADDRESS IS: 5125 MYRLE DRIVE, ADDIS, LA 70710

SEIZED IN THE ABOVE SUIT.

TERMS OF SALE: CASH TO THE HIGHEST BIDDER WITH BENEFIT OF APPRAISEMENT, AND ACCORDING TO LAW.

JEFF BERGERON, SHERIFF PARISH OF WEST BATON ROUGE
BY: ANGIE DELAUNE DEPUTY SHERIFF

ADVERTISE IN THE ADVOCATE ON: 5/1/25 & 5/29/25
138701
$56.05

SHERIFF'S SALE

SUIT NO. 49884

FEDERAL NATIONAL MORTGAGE ASSOCIATION vs DAVID P. JAMES, SR., A/K/A DAVID JAMES, SR., A/K/A DAVID P. JAMES, A/K/A DAVID JAMES AND JUDY JULIEN JAMES, A/K/A JUDY J. JAMES, A/K/A JUDY JAMES

18TH JUDICIAL DISTRICT COURT PARISH OF WEST BATON ROUGE STATE OF LOUISIANA

SUIT NO. 49884

BY VIRTUE OF A WRIT OF SEIZURE AND SALE TO ME, DIRECTED BY THE HONORABLE THE EIGHTEENTH JUDICIAL DISTRICT COURT, FOR THE PARISH OF WEST BATON ROUGE, IN THE ABOVE ENTITLED CAUSE, I WILL PROCEED TO SELL BY PUBLIC AUCTION, IN FRONT OF THE COURTHOUSE DOOR, ON THE 4TH DAY OF JUNE, 2025 AT TEN O'CLOCK (10:00) A.M.,

THE FOLLOWING DESCRIBED PROPERTY:
A certain tract or parcel of land together with all buildings and improvements thereon, situated in West Baton Rouge Parish, State of Louisiana, being more fully designated as lot number thirty-nine (39), in West Side Gardens Subdivision, as shown on the plat by Woody R. Triche, P.L.S., entitled "Final plat West Side Gardens Subdivision Lots 1-43 and the re-subdivision of Tract I-B-1-B into Tract I-B-1-B-1 being a portion of the Louis Cohn and Mrs. Julia Cohn Marks property located in Section 67, T-7-S, R-12-E, Southeast Land District, City of Port Allen, West Baton Rouge Parish, Louisiana, for Fontaine/Ward Properties, LLC and DBB LLC", recorded in conveyance book 440, entry number 204 in the records of West Baton Rouge Parish, Louisiana.

MUNICIPAL ADDRESS IS: 289 MELISSA AVENUE, PORT ALLEN, LA 70767

SEIZED IN THE ABOVE SUIT.

TERMS OF SALE: CASH TO THE HIGHEST BIDDER WITH BENEFIT OF APPRAISEMENT, AND ACCORDING TO LAW.

JEFF BERGERON, SHERIFF PARISH OF WEST BATON ROUGE
BY: ANGIE DELAUNE DEPUTY SHERIFF

ADVERTISE IN THE ADVOCATE ON: 5/1/25 & 5/29/25
138704
$57.73

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on stories that matter
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Legal Notices

emergency involving public safety. The conditions and circumstances requiring this emergency purchase is for Energy Recovery Ventilator at LC-Library. The amount of this expenditure is $108,731.00 and issued to Mid-South Equipment Sales & Services LLC 5751 River Road New Orleans, La. 70123.

139795-MAY 8-1T
$

PUBLIC NOTICE

Notice of Hearing on Proposed 2025-26 Budget for Discovery Health Sciences Foundation, Inc. - Baton Rouge Ochsner Discovery

Monday, June 2, 2025 @ 4:30pm
Kenner Discovery, 3837 Loyola Drive, Kenner, LA 70065, Room B301

(Hearings may last approximately one hour)

For at least ten calendar days before its Public Hearing, the school's proposed budget will be available for public inspection online via the school's website or during school hours in its Main Office.

Baton Rouge Ochsner Discovery does not discriminate in the rendering of services to/or employment of individuals because of race, color, religion, sex, age, national origin, disability, veteran status or any other characteristic protected by law.

139926-may 8-1t
$132.61

PUBLIC NOTICE

OFFICIAL NOTICE OF THE INTENT OF THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT TO LEVY AND COLLECT A 1% SALES AND USE TAX AND A 1% HOTEL OCCUPANCY TAX WITHIN THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT

The Louisiana State University Economic Development District **("District")**, a political subdivision of the State of Louisiana **("State")**, is an economic development district established by the State Legislature pursuant to R.S. 33:9038.76 **("Enabling Act")**, subject to the provisions of Chapter 27 of Title 33 of the Louisiana Revised Statutes of 1950, as amended (La. R.S. 33:9038.29 through 33:9038.42, inclusive) (collectively, **"Acts"**), and other constitutional and statutory authority.

Pursuant to the Acts, the District is empowered to levy and collect up to two percent (2%) of sales and use taxes, or up to two percent (2%) of hotel occupancy taxes, or any combination of such taxes, above and in addition to any other ad valorem taxes, sales taxes, or hotel occupancy taxes, or combination of such taxes, then in existence or permitted to be in existence in the District.

The public is hereby notified that the Board of Commissioners of the District, the governing authority of the District **("Board")**, intends to adopt a resolution authorizing the levy and collection of (a) a one percent (1%) tax upon the sale at retail, the use, the lease or rental, the consumption and storage for use or consumption of tangible personal property and on sales of services in the District and (b) a one percent (1%) hotel occupancy tax within the District commencing July 1, 2025 (collectively, **"New Tax"**).

The projects approved and funded by the District utilizing the New Tax will create economic development benefits to the City of Baton Rouge and the State of Louisiana.

PURSUANT TO LA. R.S. 38:9038.76, THE PUBLIC IS HEREBY NOTIFIED THAT THE BOARD OF COMMISSIONERS OF THE DISTRICT WILL MEET IN OPEN AND PUBLIC SESSION TO HOLD A PUBLIC HEARING TO HEAR ANY OBJECTIONS BY THE PUBLIC TO THE PROPOSED LEVY OF THE NEW TAX AND TO CONSIDER APPROVING THE LEVY AND COLLECTION OF THE NEW TAX BY ADOPTING THE ABOVE DESCRIBED RESOLUTION AT ITS MEETING TO BE HELD ON THURSDAY, MAY 22, 2025, 1:30 P.M., AT THE LSU FOUNDATION, THIRD-FLOOR TRAINING ROOM, 3796 NICHOLSON DRIVE, BATON ROUGE, LA 70802.

139917-my 8-15-2t
$617.94

PUBLIC NOTICE

OFFICIAL NOTICE OF THE INTENT OF THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT TO LEVY AND COLLECT A 1% SALES AND USE TAX AND A 1% HOTEL OCCUPANCY TAX WITHIN THE LOUISIANA STATE UNIVERSITY ECONOMIC DEVELOPMENT DISTRICT

The Louisiana State University Economic Development District **("District")**, a political subdivision of the State of Louisiana **("State")**, is an economic development district established by the State Legislature pursuant to R.S. 33:9038.76 **("Enabling Act")**, subject to the provisions of Chapter 27 of Title 33 of the Louisiana Revised Statutes of 1950, as amended (La. R.S. 33:9038.29 through 33:9038.42, inclusive) (collectively, **"Acts"**), and other constitutional and statutory authority.

Pursuant to the Acts, the District is empowered to levy and collect up to two percent (2%) of sales and use taxes, or up to two percent (2%) of hotel occupancy taxes, or any combination of such taxes, then in existence or permitted to be in existence in the District.

The public is hereby notified that the Board of Commissioners of the District, the governing authority of the District **("Board")**, intends to adopt a resolution authorizing the levy and collection of (a) a one percent (1%) tax upon the sale at retail, the use, the lease or rental, the consumption and storage for use or consumption of tangible personal property and on sales of services in the District and (b) a one percent (1%) hotel occupancy tax within the District commencing July 1, 2025 (collectively, **"New Tax"**).

The projects approved and funded by the District utilizing the New Tax will create economic development benefits to the City of Baton Rouge and the State of Louisiana.

PURSUANT TO LA. R.S. 38:9038.76, THE PUBLIC IS HEREBY NOTIFIED THAT THE BOARD OF COMMISSIONERS OF THE DISTRICT WILL MEET IN OPEN AND PUBLIC SESSION TO HOLD A PUBLIC HEARING TO HEAR ANY OBJECTIONS BY THE PUBLIC TO THE PROPOSED LEVY OF THE NEW TAX AND TO CONSIDER APPROVING THE LEVY AND COLLECTION OF THE NEW TAX BY ADOPTING THE ABOVE DESCRIBED RESOLUTION AT ITS MEETING TO BE HELD ON THURSDAY, MAY 22, 2025, 1:30 P.M., AT THE LSU FOUNDATION, THIRD-FLOOR TRAINING ROOM, 3796 NICHOLSON DRIVE, BATON ROUGE, LA 70802.

139917-my 8-15-2t
$617.94

PUBLIC NOTICE

Summary of Public Notice:

Project Owner: Sharlo Senior Apartments, LP
Project Name: Sharlo Senior Apartments
Project Address: 1808 Brightside Dr. Baton Rouge, LA
Total Units: 90 – Senior Housing Units
Mix of Units: (1 and 2 bedroom units)

The project owner is proposing the rehabilitation of the Sharlo Senior Apartments development, which is a 90-unit Seniors (62+) housing development. The development will consist of a community facility and supportive services which will be available for the tenants. The applicant is applying for a reservation of 9% LIHTCs from the Louisiana Housing Corporation.

The total estimated development cost is $ 17,600,000. The development will be funded with private financing and equity proceeds from the sale of Low-Income Housing Tax Credit and other financing provided as follows (Amounts are estimated):

Permanent Financing $ 5,600,000

LIHTC Equity $ 9,100,000

Deferred Developer Fee $ -

Other: $ 2,900,000

Total sources of funds $ 17,600,000

NOTE: Please contact Rae Wilder at rae.wilder@ccinvest.com for any questions regarding this notice.

139934-may 8-10-3t
$554.59

PUBLIC NOTICE

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at **www.tips-usa.com** for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Escalators (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

137984 May 1, 8, 2t
$214.68

PUBLIC NOTICE

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM OR LIMITATION OF LIABILITY

CIVIL ACTION NO. 25-630

SECTION

JUDGE

MAG. JUDGE

NOTICE OF ACTION BROUGHT FOR EXONERATION FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving the M/V DIXIE LEE EYMARD which occurred on or about September 22, 2024 when it is alleged that Dwayne Johnlouis sustained injuries while working aboard a barge being moved by the M/V DIXIE LEE EYMARD.

All persons having such claims must file them as provided in the Federal Rules of Civil Procedure, Supplemental Rule F, with the Clerk of this Court, at the United States Courthouse, 500 Poydras Street, New Orleans, Louisiana, 70130 and serve copies on or mail copies to complainant's attorneys, Mouledoux, Bland, Legrand & Brackett, attention: Michael Neuner, 701 Poydras Street, Suite 600, New Orleans, Louisiana 70139, on or before the ____ day of _____, 2025, or be defaulted. Personal attendance is not required.

Any claimant desiring to contest the right of Complainant to exoneration from liability or the right of Complainant to limitation of liability must file an answer to said Complaint, as required by the aforesaid Supplemental Rule F, and must serve on or mail to Complainant's attorneys a copy thereof, unless his claim has included an answer.

New Orleans, Louisiana, this ____ day of _____, 2025.

UNITED STATES DISTRICT JUDGE

136387 April 17, 24, May 1, 8, 4t
$1,006.64

PUBLIC NOTICE

UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF LOUISIANA

IN THE MATTER OF L&G TOWING, LLC, AS OWNER AND OPERATOR OF THE M/V DIXIE LEE EYMARD FOR EXONERATION FROM

OR LIMITATION OF LIABILITY

CIVIL ACTION NO.

SECTION

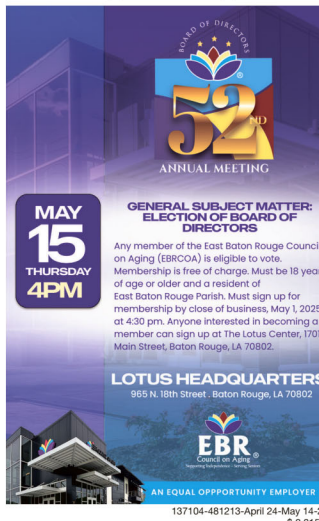
JUDGE

MAG. JUDGE

NOTICE OF ACTION BROUGHT FOR

EXONERATION FROM OR LIMITATION OF LIABILITY

Notice is given that L&G Towing, LLC (hereinafter "L&G" or "Complainant") has filed a Complaint claiming the right to exoneration from or limitation of liability for all claims arising out of a certain incident involving



137104-481213-April 24-May 14-21x
$ 2,215.29

Louisiana Public Facilities Authority

On motion of Trustee Guidry, seconded by Trustee Cheramie, the following resolution was adopted:

RESOLUTION

A resolution making certain findings with respect to and authorizing the issuance of not exceeding $159,000,000 aggregate principal amount of Louisiana Public Facilities Authority Revenue Bonds (Acadiana Renaissance Charter Academy Project) in one or more series, on a taxable or tax-exempt basis; approving the form and authorizing the execution and delivery of a Trust Indenture, a Loan Agreement and a Bond Purchase Agreement for the Bonds; approving the distribution of a Preliminary Limited Offering Memorandum and a final Limited Offering Memorandum for said Bonds; approving the sale of the Bonds; ratifying the publication of a Notice of Sale of Bonds and a Notice of Public Hearing; authorizing the execution of other documents in connection therewith; authorizing the officers and trustees of the Authority to do all things necessary to effectuate this resolution; and providing for other matters in connection with the foregoing.

WHEREAS, the Louisiana Public Facilities Authority (the "Authority") is a public trust and public corporation of the State of Louisiana (the "State") created and existing pursuant to the provisions of Chapter 2-A of Title 9 of the Louisiana Revised Statutes of 1950, as amended (the "Act"), and is authorized and empowered by law, including particularly the provisions of the Act, to issue its revenue bonds for the purpose of financing, acquiring, constructing, purchasing, equipping, maintaining, installing, leasing, subleasing, holding, extending, enlarging, remodeling, storing, operating, repairing and administering educational services and facilities; and

WHEREAS, the Authority adopted a resolution on March 12, 2025, authorizing the execution of a preliminary agreement between the Authority and Friends of Lafayette Charter Foundation, Inc., a Louisiana nonprofit corporation (the "Borrower"), authorizing the issuance of revenue bonds in one or more series, on a taxable or tax-exempt basis pursuant to the Act and authorizing the form of and publication of a Notice of Sale of Bonds and a Notice of Public Hearing; and

WHEREAS, the State Bond Commission (the "Commission") on April 22, 2025, granted its approval of the issuance by the Authority of its revenue bonds in the aggregate principal amount of not exceeding $159,000,000 in one or more series; and

WHEREAS, the Borrower has requested that the Authority issue in one or more series not exceeding $159,000,000 Louisiana Public Facilities Authority Revenue Bonds (Acadiana Renaissance Charter Academy Project) Series 2025 (the "Bonds") for the purposes of (i) financing the acquisition of buildings and other improvements constructed on leased land upon which is located the Acadiana Renaissance Charter Academy (the "School"), a kindergarten through twelfth grade, tuition free, public charter school in Youngsville, Louisiana (the "Project"), (ii) funding one or more reserve funds, and (iii) paying the costs of issuance of the Bonds (collectively, the "Project"), pursuant to an Trust Indenture (the "Indenture"), between the Authority and Regions Bank (the "Trustee"), the proceeds of which Bonds are to be loaned to the Borrower pursuant to a Loan Agreement between the Authority and the Borrower (the "Loan Agreement"); and

WHEREAS, multiple separate limited liability companies of which Red Apple Development, LLC is the sole member (collectively, the "Ground Lessor") own the parcels of land on which the School is located (the "Land") and at delivery of the Bonds, it is expected that they will lease the Land and the School located thereon to the Borrower which will sublease the land and lease the Project to Lafayette Charter Foundation, Inc. (the "Operator") which will have a leasehold interest in the Project pursuant to which it will make rental payments under one or more agreements providing for such lease and sublease (collectively, the "Facilities Lease and Ground Sublease Agreement"); and

WHEREAS, pursuant to the Loan Agreement, the Borrower will agree to make payments in an amount sufficient to make timely payments of principal of, premium, if any, and interest on the Bonds and to pay such other amounts as are required by the Loan Agreement; and

WHEREAS, all requirements of the Commission evidenced by its rules and regulations, including but not limited to notice to local legislators, have been complied with; and

WHEREAS, the Authority is authorized under the provisions of the Act and other constitutional and statutory authority to issue and sell the Bonds for such purposes and the Authority has determined that it is most advantageous to the Authority and necessary for it to issue its revenue bonds as hereinafter provided for such purposes; and

WHEREAS, the Authority has determined that the issuance and sale of the Bonds and the use of the proceeds thereof as described herein will be in furtherance of the public purposes intended to be served by the Act; and

WHEREAS, all consents and approvals required to be given by public bodies in connection with the authorization, issuance and sale of the Bonds as authorized by the Indenture and as required by the Act have been or will be secured prior to the delivery of the Bonds; and

WHEREAS, Herbert J. Sims & Co., Inc. (the "Underwriter"), has prepared and submitted to the Operator, the Borrower, and the Authority a Preliminary Limited Offering Memorandum and will prepare and submit to the Operator, the Borrower and the Authority a final Limited Offering Memorandum for use in connection with the offer and sale of the Bonds; and

WHEREAS, the Underwriter proposes to arrange for the purchase of the Bonds in accordance with the terms of a bond purchase agreement by and among the Underwriter, the Borrower, the Operator and the Authority (the "Bond Purchase Agreement") with respect to the Bonds; and

WHEREAS, the Authority now desires to fix the details necessary with respect to the issuance and sale of the Bonds, to authorize the execution and delivery of the Loan Agreement, the Indenture and the Bond Purchase Agreement, to ratify the publication of a Notice of Public Hearing and a Notice of Sale of Bonds, to authorize the sale of the Bonds, and to provide for the execution of certain instruments, documents and certificates in connection therewith; and

NOW, THEREFORE, BE IT RESOLVED by the Louisiana Public Facilities Authority that:

SECTION It is the public purpose and within the power and authority vested in the Authority under the Act to provide funds for the financing of the Project through the issuance of the Bonds as limited and special revenue obligation bonds of the Authority. The financing of the Project through the issuance of the Bonds will foster and be in furtherance of the objectives of the Act by providing for and assisting in furthering the educational purposes of the State and its inhabitants.

SECTION The Authority hereby authorizes the issuance of the Bonds as Louisiana Public Facilities Authority Revenue Bonds (Acadiana Renaissance Charter Academy Project) with an appropriate series designation for the purposes of (i) financing the acquisition of Acadiana Renaissance Charter Academy, a kindergarten through twelfth grade, tuition free, public charter school in Youngsville, Louisiana, (ii) funding one or more reserve funds, and (iii) paying the costs of issuance of the Bonds. The Bonds shall be issued in the total aggregate principal amount of not exceeding $159,000,000 and shall be issued as fully registered bonds in the denomination of $100,000 or any integral multiple of $5,000 in excess thereof, shall mature not later than June 15, 2059, and shall bear interest at a fixed or variable rate not to exceed 7.13% per annum on a tax-exempt or taxable basis, all as set forth in the Indenture.

SECTION The Authority hereby authorizes the sale of the Bonds to the Underwriter pursuant to the terms of the Bond Purchase Agreement to be entered into by and among the Underwriter, the Borrower, the Operator and the Authority. The sale of all or a portion of the Bonds to the Underwriter at a price of not less than 90% of the principal amount thereof (inclusive of underwriter's discount in an amount not exceeding 3% of the principal amount thereof) is hereby approved.

SECTION The form, terms and provisions of the Indenture and the Loan Agreement are hereby approved in substantially the same form as submitted to the Authority and filed with the official minutes of the Authority, all of the provisions of which are hereby made a part of this resolution, with such additions, omissions and changes as may be approved by bond counsel to the Authority. The Chairman or Vice Chairman and the Secretary-Treasurer or an Assistant Secretary of the Authority be and they are hereby authorized, empowered and directed to execute the Indenture, the Loan Agreement and the Bond Purchase Agreement for, on behalf of and in the name of the Authority, in accordance with the provisions and requirements of the Act.

The Bonds are issued under and secured by the Indenture which provides a complete description of the pledged property and revenues constituting the Trust Estate, as defined in the Indenture (which includes, among other things, all of the Authority's rights, title and interest in and to payments under the Loan Agreement and mortgages on the facilities and assignments of leases and rents by the Borrower and by the Ground Lessor in favor of Regions Bank), the nature and extent of the security, a statement of the terms and conditions on which the Bonds are issued and secured; the rights, duties and obligations of the Authority, the rights, duties and immunities of the Trustee, and the rights of the owners of the Bonds.

The Bonds are hereby expressly authorized to be signed by the Chairman or Vice Chairman of the Authority, said signatures shall be attested by the signature of the Secretary-Treasurer or an Assistant Secretary of the Authority, and the signatures of the Chairman or Vice Chairman and Secretary-Treasurer or Assistant Secretary may be evidenced by their facsimile signatures.

The Bonds are limited and special obligations of the Authority and do not constitute or create an obligation, general or special, debt, liability or moral obligation of the State or of any political subdivision thereof, within the meaning of any constitutional or statutory provisions whatsoever, and neither the faith or credit nor the taxing power of the State or of any political subdivision thereof is pledged to the payment of the principal of, premium, if any, or the interest on the Bonds. The Bonds are not general obligations of the Authority (which has no taxing power and receives no funds from any governmental body), but they are limited and special revenue obligations of the Authority payable from the income, revenues and receipts derived or to be derived from payments made pursuant to the Loan Agreement and the Borrower's lease of the Project to the Operator, and are further secured by the Multiple Indebtedness Leasehold Mortgages, Assignment and Pledge of Leases and Rents and Security Agreements by the Borrower in favor of the Mortgagee and the Multiple Indebtedness Mortgages, Assignment and Pledge of Leases and Rents and Security Agreement by the Ground Lessor in favor of the Mortgagee.

SECTION The Authority hereby ratifies the publication of (i) the Notice of Public Hearing on the website of the Authority on April 2, 2025, and (ii) the Notice of Sale of Bonds in The Advocate and The Bond Buyer on April 23, 2025.

SECTION This Board of Trustees does hereby authorize the distribution by the Underwriter of a Preliminary Limited Offering Memorandum and a final Limited Offering Memorandum in connection with the sale of the Bonds; provided, however, that neither this Board of Trustees nor the Authority makes any representation or warranty, either express or implied, as to the accuracy or completeness of the information contained therein (other than under the heading "INTRODUCTION – Authority to Issue," "THE ISSUER" and "ABSENCE OF MATERIAL LITIGATION - The Issuer"). The Chairman or Vice Chairman of this Board of Trustees is hereby authorized, empowered and directed to execute and deliver the Limited Offering Memorandum to the Underwriter in accordance with the terms of the Bond Purchase Agreement.

SECTION The Chairman or Vice Chairman and Secretary-Treasurer or Assistant Secretary of the Authority shall have prepared and shall execute for and on behalf of the Authority the Bonds, and shall deliver the same to the Trustee for authentication. The Trustee shall, upon authentication of the Bonds, deliver the same in one or more series to the Underwriter in accordance with the Indenture and the Bond Purchase Agreement and shall receive from the Underwriter for the account of the Authority the purchase price and shall hold the proceeds of the Bonds in the funds and accounts as prescribed in the Indenture. The Trustee is hereby requested and authorized to authenticate the Bonds.

SECTION The Chairman or the Vice Chairman and the Secretary-Treasurer or an Assistant Secretary of the Authority are hereby further authorized and directed, for and on behalf of the Authority, to accept, receive, execute, seal, attest and deliver all such documents, certificates and other instruments as are required, necessary, convenient and appropriate in connection with the authorization, issuance, sale and delivery of the Bonds, the Indenture and the Loan Agreement, including, but not limited to, the Tax Regulatory Agreement by and among the Authority, the Trustee, the Borrower and the Operator, and to take such further action as may be required by the Commission or bond counsel to the Authority or appropriate or required by law in connection with the authorization, issuance, sale and delivery of the Bonds. Said officers are hereby further authorized and directed to approve for, on behalf of, and in the name of the Authority any changes, additions or deletions in any of the documents, instruments or certificates referred to in this resolution, provided that all such changes, additions or deletions, if any, shall be approved by bond counsel to the Authority and shall be consistent with the authority provided by the Act. The signatures of the said Chairman, Vice Chairman, Secretary-Treasurer or Assistant Secretary upon such documents set forth above, or as may be otherwise required for or necessary, convenient or appropriate to the financing described in this resolution, are deemed to be conclusive evidence of their due exercise of the authority vested in them hereunder.

SECTION The Chairman or Vice Chairman of the Authority are hereby further authorized to take such action as is necessary, on the advice of bond counsel to the Authority, to effectuate and implement this resolution including the publication hereof as required by the Act.

SECTION ~~By virtue of the Authority's application~~ for, acceptance and utilization ~~of the benefits of the State~~ Bond Commission's approval, the Authority ~~understands and agrees that such approval~~ is expressly conditioned ~~upon, and further understands, agrees and~~ binds itself, its successors and ~~assigns, to full and continuing compliance~~ with the "State Bond Commission ~~Policy on Approval of Proposed~~ Use of Swaps, or other forms of Derivative Products, Hedges, Etc.," adopted by the Commission on July 20, 2006, as to the borrowing and other matters subject to the approval, including approval under said Policy of the implementation or use of any swaps or other products or enhancements covered thereby.

SECTION This resolution shall be published one time in the official journal of the Authority.

SECTION This resolution shall become effective immediately.

This resolution having been submitted to a vote, the vote thereon was as follows:

Member	Yea	Nay	Absent	Abstaining
Ronald H. Bordelon	X			
Craig A. Cheramie	X			
David W. Groner	X			
Casey R. Guidry	X			
Dannye W. Malone	X			
Heather C. Songy	X			
Matthew T. Valliere				X

This resolution declared adopted on this 30th day of April, 2025.

(Other items of business not pertinent to the foregoing resolution and the documents mentioned therein may be found in the official minutes of the Board of Trustees of the Authority.)

Upon motion duly made, seconded and unanimously carried, the meeting was adjourned.

I, the undersigned, do hereby certify that I am an Assistant Secretary of the Board of Trustees of the Louisiana Public Facilities Authority (the "Authority"), a public trust duly organized and existing under and by virtue of the laws of the State of Louisiana, and as such Assistant Secretary I have access to all records of the Authority.

I do hereby further certify that at a meeting of the Board of Trustees of the Authority duly called, held and convened, according to law, on April 30, 2025 a quorum being present and voting thereon, the above and foregoing Resolution was unanimously adopted and that said Resolution is a full true and correct copy of the said Resolution as it appears on the records of the Authority; that the same has not been revoked or amended and is now in full force and effect.

IN WITNESS WHEREOF, I have hereunto set my hand and attached the seal of the Authority this 30th day of April, 2025.

LOUISIANA PUBLIC FACILITIES AUTHORITY

By: /s/ Patricia A. Dubroc
Assistant Secretary

[SEAL]

139957-490531-may 8-1t
$ 458.64

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477 • tips@tips-usa.com

April 22, 2025

Gilmer Mirror

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

PUBLISHER'S AFFIDAVIT

THE STATE OF TEXAS, COUNTY OF UPSHUR

On this 19th day of MAY, 2025, personally appeared before me, the undersigned, a Notary Public in and for said County and State, William R. Greene, Publisher/Editor of The Gilmer Mirror, a newspaper published at Gilmer, County of Upshur, State of Texas, who, being by me duly sworn on oath, states that:

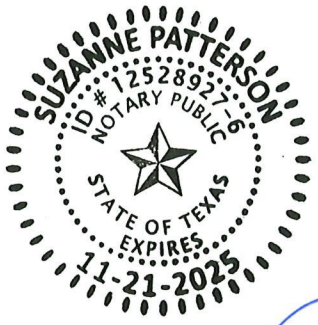
LEGAL NOTICE: TIPS BIDS

A true copy of which is hereto annexed, was published in said newspaper in its issues MAY 1 & 8, 2025

William R. Greene
Publisher/Editor

Subscribed and sworn to before me, this 19th day of MAY, 2025.

(Seal)



Suzanne Patterson
Notary Public, Upshur County, Texas



Planning a vacation? Need extra cash?

Sell your unwanted items with a classified ad!

Call **903-843-2503** To Place Your Ad

Apartments for Rent

PUBLIC NOTICE

The Gilmer Housing Authority is accepting applications for housing. The Gilmer PHA is made up of 1,2,3, and 4 bedroom apartments and has both elderly and non-elderly units.
The Gilmer PHA is for low and very low income applicants.
The Gilmer PHA does not discriminate on the basis of race, color, national origin, age, or handicap.
Eligible elderly, handicapped or families may apply at:
Gilmer Housing Authority
104 Circle Drive, P.O. Box 397
Gilmer, Texas 75644
Phone: 903-843-3141
Office hours are
Monday - Friday 8am-4pm
This institution is an equal opportunity provider and employer.

"All real estate advertised herein is subject to the Federal Fair Housing Act, which makes it illegal to advertise 'any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or intention to make any such preference, limitation, or discrimination.' "We will not knowingly accept any advertising for real estate which is in violation of the law. All persons are hereby informed that all dwellings advertised are available on an equal opportunity basis."

Garage Sales

Classic Farm Equipment & Garage Sale
May 9 • 8am-4pm
May 10 • 8am-2pm
2556 Ash Rd • Gilmer
Less than 1 mile from High School

Ford N Tractor with 4 implements, brush hog, disc, plow,& blade; 2 riding lawn mowers, recently serviced; small cow trailer; 2 air compressors; gas & electric chainsaws; gas blower; weedeater; Suzuki 50cc Moped; table saw & tools too numerous to mention; walnut gun case; lots of Coca-Cola; lots of old things from farm and house; fifth wheel hitch; half barrels from ads.
NO clothes and NO early lookers!

Garage Sales

MULTI FAMILY GARAGE Sale 1010 S Montgomery St Friday & Saturday 8am-? Moving! Everything must go!

ESTATE SALE- DORIS Tuel. Cash only. Lots of everything. May 2, 3 8am-5pm 2688 Bison Road, Gilmer, TX

MULTI FAMILY GARAGE Sale May 2 & 3, 8am 7096 FM 852, Gilmer. Tools, furniture, window units, baby items, tin, & miscellaneous.

Help Wanted

ELECTRICAL COMPANY SEEKING highly motivated and skilled Licensed Journeyman and Helpers. Call 903-725-5580 or email circles@etex.net

For classified ads and local news visit our website!

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www.gilmermirror.com

Lawn & Garden

Gab's Tree Trimming & Clearing Service
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Gabriel Escalante
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903-790-1093 or 903-790-7040

Lawn & Garden

Bush hogging & mowing
Free Estimates
Up to 20 acres
903-738-6001

Lawn & Garden

ONE MAN & A MOWER
Spring Clean Ups, Mowing, Mulching, Blowing, Weed Eating, Edging
Mike Maness
903-261-8760

Public Notice

PUBLIC NOTICE

In accordance with House Bill 1545 (86th Legislative Session, 2019), notice is hereby given that an application for a local option liquor election has been filed by Gokarna KC on behalf of Big Sandy Business LLC. The petition seeks to gather signatures for the legal sale of malt beverages and wine for off-premise consumption only.
The individual or entity applying for the petition is Big Sandy Business LLC. The type of local option liquor election being pursued is for the legalization of the sale of malt beverages and wine for off-premise consumption only.
This notice serves to fulfill the requirement for proof of publication in a newspaper of general circulation, as mandated by law. The publication includes the name of the territory, which in this case will be Precinct 4, Upshur County TX 75755, where the petition will be circulated.
The application for the local option liquor election will be filed with Lory Harle, Upshur County Administrator Elections located at 115 Simpson Gilmer, TX 75644.
This notice is published once to meet the statutory requirement, and further updates on the progress of the petition will be provided as necessary.
For inquiries or further information, please contact Gokarna KC at Best Mart 10 or visit 1010 FM 1002 S Big Sandy, TX 75755.

Public Notice

CITATION BY PUBLICATION HEIRSHIP-UNKNOWN HEIRS THE STATE OF TEXAS COUNTY OF UPSHUR JOE W. NEWSOM JR., Applicant's Attorney

TO ALL UNKNOWN HEIRS IN THE ESTATE OF:

JOHNNY JOE SHANNON BOLAND, Deceased, 25-230-CCPR-00006 In the County Court of Upshur County, Texas

SAMANTHA MICHELLE LAWSON, Applicant, filed in the County Court of Upshur County, an **Application for Determination of Heirship and Application for Letters of Administration** on the **ESTATE OF JOHNNY JOE SHANNON BOLAND**, deceased, requesting that the Court determine who are the heirs and only heirs of **JOHNNY JOE SHANNON BOLAND**, deceased, and their respective shares and interests in such estate.

The court may act on this application at any call of the docket on or after 10:00 a.m., on the first Monday next after the expiration of 10 days from the date of publication of this citation, at the Upshur County Courthouse, 150 E. Jefferson Street, Gilmer, Texas 75644.

All persons interested in said estate are cited to appear before this Honorable Court by filing a written contest or answer to this Application should they desire to do so. **To ensure its consideration, you or your attorney must file any objection, intervention, or response in writing** with the County Clerk of Upshur County, Texas on or before the above noted date and time.

GIVEN UNDER MY HAND AND SEAL of said Court, at the office of the Upshur County Clerk in Gilmer, Texas on the 10th day of March, 2025.

TERRI ROSS, County Clerk Upshur County, Texas
150 E. Jefferson Street
Gilmer, Texas 75644
By K.P. Deputy

Public Notice

PUBLIC NOTICE

New Diana I.S.D. Maintenance department is taking quotes on a 20 w x 30 l x 10' H Vertical Metal Building and 20x30x 4" concrete slab. For details about the job contact Bruce Jeffery at 903 663-8000 ext. 8400. Quotes are due no later than Thursday, May 15, 2025 @ 2:00 p.m. 11140 State Hwy 154 East Diana, Texas 75640.

Advertise your business online!

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that letters testamentary for the estate of MILTON E. BAGLEY, Decedent, were issued on April 22, 2025 in Case No. 25-230-CCPR-00015 pending in the Upshur County Court, Upshur County, Texas to LINDA DAILEY, Independent Executor.

Claims may be presented to the representative's attorney

Kristen J. Ishihara,
3000 HG Mosley Pkwy,
Longview, TX 75605

All persons having claims against this estate, which is currently being administered, are required to present them within the time and in the manner prescribed by law.

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the Estate of BOBBY REX GAGE, Deceased, was issued on the 21st day of April, 2025 in Docket Number 25-230-CCPR-00017 in the County Court of Upshur County, Texas, to SHIRLEY M. GAGE.

The residence of the Independent Executor is in Upshur County, Texas and the mailing address is:

Estate of Bobby Rex Gage
c/o Shirley M. Gage
5311 Aspen Trail
Gilmer, Texas 75644

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

DATED the 23rd day of April, 2025.

Dwight A. Brannon
State Bar #02894500
P.O. Box 670
Gilmer, Texas 75644
(903) 843-2523
Attorney for the Estate of Bobby Rex Gage, Deceased

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the Estate of BERNARD WAYNE HAYNES, JR., Deceased, was issued on the 21st day of April, 2025 in Docket Number 25-230-CCPR-00012 in the County Court of Upshur County, Texas, to LESLIE C. SPEARS and BETTY F. INGLISH.

The residence of one of the Co-Independent Executors is in Upshur County, Texas and the mailing address is:

Estate of Bernard Wayne Haynes, Jr.
c/o Leslie C. Spears and Betty F. Inglish
9025 Bob-O-Link Road
Gladewater, Texas 75647

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

DATED the 23rd day of April, 2025.

Dwight A. Brannon
State Bar #02894500
P.O. Box 670
Gilmer, Texas 75644
(903) 843-2523
Attorney for the Estate of Bernard Wayne Haynes, Jr., Deceased

Public Notice

PUBLIC NOTICE TO ALL PERSONS BUYING PROPERTY IN THE VICINITY OF THE SHARON WATER SUPPLY CORP.

Sharon Water Supply Corp. urges any prospective buyers to verify with the Manager at the office located at 6175 N. State Hwy. 37, Winnsboro, Texas, whether or not water is available at the tract of land in question. Sharon Water Supply Corporation 6175 N. State Hwy. 37 Winnsboro, Texas 75494. 903-342-3525

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the Estate of JODY CLINT ROBERTS, Deceased, was issued on the 21st day of April, 2025 in Docket Number 25-230-CCPR-00018 in the County Court of Upshur County, Texas, to SHERRY L. ROBERTS.
The residence of the Independent Executor is in Upshur County, Texas and the mailing address is:

Estate of Jody Clint Roberts
c/o Sherry L. Roberts
310 Crepe Myrtle Road
Big Sandy, Texas 75755

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

DATED the 23rd day of April, 2025.

Dwight A. Brannon
State Bar #02894500
P.O. Box 670
Gilmer, Texas 75644
(903) 843-2523
Attorney for the Estate of Jody Clint Roberts, Deceased

Public Notice

NOTICE TO CREDITORS

Notice is hereby given that original Letters Testamentary for the Estate of EILEEN M. STEVENS, Deceased, were issued on April 21, 2025, in Cause No. 25PR00329, pending in the County Court of Upshur County, Texas, to: KIMBERLY STEVENS THOMAS

All persons having claims against this Estate which is currently being administered are required to present them to Kimberly Stevens Thomas, c/o Kyle G. Waggoner, Attorney at Law, at PO Box 1152, Mineola, Texas, 75773.

Public Notice

NOTICE TO ALL PERSONS BUYING PROPERTY IN THE VICINITY OF THE PRITCHETT WATER SUPPLY CORP.

Pritchett Water Supply Corp. understands that property is sometimes sold with the representation that water is available to the property from the PWSC System. Such is not always the case, and the PWSC urges any prospective buyer to verify with the operator by calling 903-734-5438 (Mon.-Fri., 8-4) or writing PWSC, 3670 State Highway 155 South, Gilmer, Texas 75645 that water is in fact available at the particular tract in question.

Public Notice

PUBLISHED NOTICE TO CREDITORS

Notice is hereby given that Letters Testamentary for the estate of RETA BELLE JOHNSON ROSS, Decedent, were issued on April 22, 2025 in Case No. 25-230-CCPR-00014 pending in the Upshur County Court, Upshur County, Texas to TAFT HUGH THOMAS, Independent Administrator.

Claims may be presented to the representative's attorney

Kristen J. Ishihara,
3000 HG Mosley Pkwy,
Longview, TX 75605

All persons having claims against this estate, which is currently being administered, are required to present them within the time and in the manner prescribed by law.

Public Notice

PUBLIC NOTICE

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.



Please watch for notice of our Holiday deadlines in The Gilmer Mirror Call 903-843-2503 for more info!

TEXAS STATEWIDE CLASSIFIED ADVERTISING NETWORK

TexSCAN

TexSCAN Week of April 27-May 3, 2025

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Waterfront Land Sale — June 7th only, off of Matagorda Bay. Texas' Newest Waterfront Community featuring 1-3 acre properties starting at $49,900. By appointment on June 7th: 830-310-6195.

AUCTION

Land Auction May 22 — 410 ± acres commercial, home site acreages, and recreational land offered in 13 parcels located 8 minutes northeast of Mount Pleasant along Interstate 30. 918-550-8118, CJ-Auctions.com.

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Lake City Area Medical Center is hiring a Mid-Level Provider. Benefit package, retirement, PTO, conference/CE allowance, HSA. $95,000-$110,000/yr. EOE Send CVs to lcmedcenter@lcamc.net or request job descriptions.

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WATER DAMAGE

WATER DAMAGE CLEANUP & RESTORATION: A small amount of water can lead to major damage in your home. Our trusted professionals do complete repairs to protect your family and your home's value! Call 24/7: 1-833-879-1450. Have zip code of service location ready when you call!

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Need Extra Cash — I Buy RVs & Mobile Homes –Travel Trailers, 5th Wheels, Gooseneck, Bumper Pulls. In Any Area, Any Condition – Old/New, Dirty or Clean! I PAY CASH. No Title – No Problem, we can apply for one. We go anywhere in Texas. ANR Enterprises, 956-466-7001!

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The Gilmer PHA is for low and very low income applicants.
The Gilmer PHA does not discriminate on the basis of race, color, national origin, age, or handicap.
Eligible elderly, handicapped or families may apply at:
Gilmer Housing Authority
104 Circle Drive, P.O. Box 397
Gilmer, Texas 75644
Phone: 903-843-3141
Office hours are
Monday - Friday 8am-4pm
This institution is an equal opportunity provider and employer.

"All real estate advertised herein is subject to the Federal Fair Housing Act, which makes it illegal to advertise 'any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or intention to make any such preference, limitation, or discrimination.' "We will not knowingly accept any advertising for real estate which is in violation of the law. All persons are hereby informed that all dwellings advertised are available on an equal opportunity basis."

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Less than 1 mile from High School

Ford N Tractor with 4 implements, brush hog, disc, plow,& blade; 2 riding lawn mowers, recently serviced; small cow trailer; 2 air compressors; gas & electric chainsaws; gas blower; weedeater; Suzuki 50cc Moped; table saw & tools too numerous to mention; walnut gun case; lots of Coca-Cola; lots of old things from farm and house; fifth wheel hitch; half barrels from ads.
NO clothes and NO early lookers!

Help Wanted

ELECTRICAL COMPANY SEEKING highly motivated and skilled Licensed Journeyman and Helpers. Call 903-725-5580 or email circles@etex.net

Notices

C&M STORAGE - Sheila Mott for lack of payment. Many of attempts have been made to contact you. Contents will be disposed of after Friday, May 23rd.

Boats & Motors

WANTED: 12'-16' SAILBOAT. Used in good condition. Must have sails, trailer, centerboard. Call or text Terry at 903-363-2177. Leave Message.

For Sale

METAL BARRELS FOR Sale. Drum, 2/$15.00, Open top $10.00, Fuel $10.00, Storage lid & seal 2/$25.00. 3.5 miles S. 155 on right and 1414 N. Cypress St, Gilmer.

Public Notice

SECTION 106 PUBLIC NOTICE

American Towers LLC is proposing to modify an existing telecommunications tower facility at 212 Boulder Avenue, Big Sandy, Upshur County, TX 75755, Parcel ID: Vol. 54 Page 54. American Towers LLC seeks comments from all interested persons on any potential significant impact the proposed action could have on the quality of the human environment pursuant to 47 C.F.R. Section 1.1307, including potential impacts to historic or cultural resources that are listed or eligible for listing in the National Register of Historic Places. Interested persons may comment or raise concerns about the proposed action by submitting an e-mail to enviro.services@americantower.com. Paper comments can be sent to: American Towers LLC, Attn: Environmental Compliance, 10 Presidential Way, Woburn, MA 01801. Requests or comments should be limited to environmental and historic/cultural resource impact concerns and must be received within 30 days from the date of this publication. This invitation to comment is separate from any local planning/zoning process that may apply to this project. Re: 22504127"

Public Notice

PUBLIC NOTICE

New Diana I.S.D. Maintenance department is taking quotes on a 20 w x 30 l x 10' H Vertical Metal Building and 20x30x 4" concrete slab. For details about the job contact Bruce Jeffery at 903 663-8000 ext. 8400. Quotes are due no later than Thursday, May 15, 2025 @ 2:00 p.m. 11140 State Hwy 154 East Diana, Texas 75640.

Public Notice

NOTICE OF SPECIAL SETTING- BUDGET WORKSHOP

The Upshur County Commissioners Court will hold a special setting Budget Workshop for the purpose of discussing the FY 2026 budget at 9:00 a.m. on May 29, 2025 to be held in the County Courtroom Upshur County Courthouse, 150 East Jefferson, Gilmer, Texas. If necessary, the Budget Workshop may extend to May 30, 2025.

The Court will have general budget discussions followed by departmental budget request presentations related to the FY 2026 Upshur County Budget.

The public is invited to attend.

Public Notice

NOTICE TO CREDITORS

Notice is hereby given that original Letters Testamentary for the Estate of ROLAND BRENT LAMBERT, Deceased, were issued on the May 5, 2025, in Cause No 25-230-CCPR-00009, pending in the County Court of Upshur County, Texas, to: JAMES BRENT LAMBERT.

All persons having claims against this Estate which is currently being administered are required to present them within the time and in the manner prescribed by law.

c/o: **JOHN L. YOUNGBLOOD**
Attorney at Law
206-B Crestway Street
Athens, Texas 75751

DATED the 5th day of May, 2025.

JOHN L. YOUNGBLOOD
Attorney for JAMES BRENT LAMBERT
State Bar No.: 24003222
206-B Crestway Street
Athens, Texas 75751
Telephone: (903) 675-5188
Facsimile: (903) 675-3057
Email: john@johnlyoungbloodlaw.com

Public Notice

PUBLIC NOTICE

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
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250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

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TexSCAN
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OIL & GAS RIGHTS
We buy oil, gas & mineral rights. Both non-producing and producing including Non-Participating Royalty Interest (NPRI). Provide us your desired price for an offer evaluation. Call today: 806-620-1422. Lobo Minerals, LLC, PO Box 1800, Lubbock, TX 79408-1800, LoboMineralsLLC@gmail.com.

WATER DAMAGE
WATER DAMAGE CLEANUP & RESTORATION: A small amount of water can lead to major damage in your home. Our trusted professionals do complete repairs to protect your family and your home's value! Call 24/7: 1-833-879-1450. Have zip code of service location ready when you call!

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Need Extra Cash — I Buy RVs & Mobile Homes –Travel Trailers, 5th Wheels, Gooseneck, Bumper Pulls. In Any Area, Any Condition – Old/New, Dirty or Clean! I PAY CASH. No Title – No Problem, we can apply for one. We go anywhere in Texas. ANR Enterprises, 956-466-7001!

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www.tips-usa.com • 866-839-8477• tips@tips-usa.com

April 22, 2025 KC

STAR
McClatchy Company LLC

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.

Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com
brooke.scott@tips-usa.com
903-575-2608

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Attention: Shelley Black

TIPS Purchasing Cooperative/Region 8 ESC
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Pittsburg, Texas 75686

brooke.scott@tips-usa.com

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The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.
IPL0229302
May 1,8 2025

THE STATE OF TEXAS
COUNTY OF TARRANT

Mary Castro,

make oath and swear that

CYPRESS MEDIA, LLC, publishers of The Kansas City Star is published in the Kansas City, Missouri, metro (distribution) area including but not exclusively to Johnson and Wyandotte Counties in the state of Kansas, and Cass, Clay, Jackson and Platte Counties in the state of Missouri. We confirm the notice ran the days scheduled in this statement. A true copy of which is hereto attached was duly published in The Kansas City Star.

2 insertion(s) published on:
05/01/25, 05/08/25

Mary Castro

Sworn to and subscribed before me this 8th day of May in the year of 2025

Amy Robbins

Notary Public in and for the state of South Carolina, residing in Beaufort County

AMY L. ROBBINS
NOTARY PUBLIC
SOUTH CAROLINA
MY COMMISSION EXPIRES 11-03-32

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LAURENT LAIRYS Abaca Press via Sipa USA

Top-seeded Aryna Sabalenka won 28 of her 36 first-serve points to beat Peyton Stearns 6-2, 6-4 in the Mutua Madrid Open on Tuesday.

Sabalenka, Swiatek, Keys reach Madrid QFs

Field Level Media

No. 1 seed Aryna Sabalenka of Belarus sailed past American foe Peyton Stearns 6-2, 6-4 on Tuesday to reach the quarterfinals of the Mutua Madrid Open.

Sabalenka headlines an intriguing final eight at the WTA 1000 event, which will also feature a duel between No. 2 seed Iga Swiatek of Poland and No. 5 Madison Keys of the U.S. after they took care of business Tuesday.

Sabalenka saved 12 of 13 break points, including 10-for-10 in the first set, while winning 28 of her 36 first-serve points (77.8 percent).

It marked the World No. 1's 28th match victory this year, which leads the WTA Tour by one over Jessica Pegula.

As she searches for her second WTA 1000 title of 2025 following last month's triumph in Miami, Sabalenka will face Ukrainian No. 24 seed Marta Kostyuk in the quarterfinals. Kostyuk was a 6-3, 6-2 winner over Russia's Anastasia Potapova in the Round of 16.

Swiatek fended off a push from Russian 13th seed Diana Shnaider and won 6-0, 6-7 (3), 6-4 on Tuesday.

Swiatek felt she moved better and put greater spin on her shots during the third set, when she won all five of her service games and 14 of 19 first-service points.

"In second set it got pretty windy, and I didn't move my legs properly," Swiatek said after the match. "I played some shots like not being ready, you know, so for sure that kind of kept my rhythm off. And then Diana also used her chances, and she was more proactive than in the first set. So I think it was a mix of different things."

Australian Open champion Keys eased past No. 19 seed Donna Vekic of Croatia 6-2, 6-3. Keys saved 2 of 3 break points while converting 5 of 8 break-point opportunities against Vekic.

Keys faces a tall task in the quarterfinals against her Polish counterpart. Swiatek is 4-2 against Keys all-time.

"I think obviously you look at matches that you won and you figure out why you won them, and you look at matches why you lost, and you try to figure out what you did wrong or what she did really well that day and then you try to come up with a game plan," Keys said of facing Swiatek.

"I think obviously it's a little bit different when you're on a surface that she loves (clay) and she does really well on and all of that. I think you have to take that into account and just kind of go one step further with that and just try to figure out how do you kind of elevate your game a little bit more because I think you have to."

Also Tuesday, No. 17 seed Elina Svitolina of Ukraine beat Greece's Maria Sakkari 6-3, 6-4, and Japan's Moyuka Uchijima overcame No. 21 seed Ekaterina Alexandrova of Russia 6-4, 7-6 (5).

The quarterfinals will also see No. 4 seed Coco Gauff take on No. 7 seed Mirra Andreeva of Russia. Gauff and Andreeva won their Round of 16 matches Monday before a nationwide power outage occurred in Spain, postponing the tournament.



SVEN HOPPE dpa via Sipa USA

For the second consecutive year, Francisco Cerundolo, seen here on April 18, defeated Alexander Zverev to advance to the quarterfinals of the Madrid Open. On Tuesday, Cerundolo won 50 of his 70 total service points to dispatch the top-seeded Zverev 7-5, 6-3.

Cerundolo downs top seed Zverev in Madrid Open

Field Level Media

No. 20 seed Francisco Cerundolo of Argentina dismissed top seed Alexander Zverev of Germany 7-5, 6-3 on Tuesday to advance to the quarterfinals of the Madrid Open.

Cerundolo defeated Zverev in the Round of 16 at this ATP Masters 1000 event for the second year in a row. He is 3-0 against Zverev all-time, including a quarterfinal victory over him in Buenos Aires earlier this season.

"I'm super happy because I know he loves playing here. He told me last year when I beat him," Cerundolo said post-match. "He's an incredible player. I have a great relationship with him, so super happy to get another win and to be in the quarterfinals again."

Cerundolo won 50 of his 70 total service points (71.4 percent) and went 7-for-7 on points at the net. Zverev managed only six winners with 23 unforced errors.

After he ended Zverev's seven-match winning streak, Cerundolo's next task will be to face Czech No. 22 seed Jakub Mensik, who is on a nine-match winning streak dating to his ATP 1000 title in Miami last month.

Mensik breezed past Kazakhstan's Alexander Bublik 6-3, 6-2 in just 56 minutes in their Round of 16 match. Bublik was caught on camera facetiously asking the chair umpire, "Remember when tennis was easy? ... Now this guy (Mensik) is not even Top 5, not even Top 10. (Expletive) is that?"

In the same region of the draw, No. 14 seed Casper Ruud of Norway knocked out No. 3 seed Taylor Fritz of the United States 7-5, 6-4, in the late match of the day. Ruud had a 27-19 edge in total winners and also won 9 of 10 points at the net.

Ruud will face No. 9 seed Daniil Medvedev of Russia in the quarterfinals after Medvedev rallied past American No. 31 Brandon Nakashima 3-6, 6-1, 6-4.

The rest of the matches Tuesday were Round of 32 affairs, as the tournament plays catch-up after a nationwide power outage Monday interrupted the event.

British No. 5 seed Jack Draper advanced when his opponent, No. 30 seed Matteo Berrettini of Italy, retired after Draper took the first set 7-6 (2).

Australian sixth seed Alex de Minaur defeated Canadian No. 29 Denis Shapovalov 6-3, 7-6 (3), while No. 10 Lorenzo Musetti of Italy topped No. 17 Stefanos Tsitsipas of Greece 7-5, 7-6 (3).

Two more Americans advanced to the Round of 16 when No. 11 seed Tommy Paul outlasted No. 24 Karen Khachanov of Russia 6-3, 3-6, 6-2, and No. 16 seed Frances Tiafoe swept Frenchman Alexandre Muller 6-3, 6-3.

Canadian lucky loser Gabriel Diallo remained alive when he charged past Great Britain's Cameron Norrie 2-6, 6-4, 6-4.

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CHARLES EUGENE BANISTER TR dba CHARLES E.BANISTER
6201 E 109TH ST KANSAS CITY,MO 64134
CHARLES EUGENE BANISTER TR dba CHARLES E.BANISTER 6201 E 109TH ST KANSAS CITY MO,64134

BCCI Construction Group

Invitation to Bid

BCCM Construction Group, Inc. and K&J Builders, LLC, will be accepting bids on the 929 Walnut Apartments Building in Kansas City, MO 64106 on May 9,2025, by 3 p.m. The project is a new 8-story, 45-unit aparatment building. MBE and WBE participation is required, at 15% each.

The prebid walk-through is scheduled for May 1, 2025, at 10:00 a.m.

Any bidding documents and or requests should be sent to estimating@bccmconstruction.com or call 816-659-9115

NOTICE OF ACCEPTANCE OF BIDS
Notice is hereby given that the Liberty Public School District No. 53 will receive bid proposals for the following:

ROOF IMPROVEMENTS – STADIUM PRESS BOXES

The District reserves the right to reject any or all bids and waive any informality. Copies of bid documents may be secured by emailing Jason Breit, Director of Purchasing at jason.breit@lps53.org.
Sealed bids must be submitted by 1:00 PM CST, Tuesday, May 13, 2025 at which time all bid proposals received will be publicly opened.
Bids should be delivered to:
Liberty Public Schools
Support Services Center
801 Kent St
Liberty, MO 64068
Attn: Jason Breit
Director of Purchasing
816-736-5358
IPL0230564
May 1,8 2025

INVITATION TO BID
Notice to Contractors

Sealed bids will be received by Kansas City Parks and Recreation Dept. at 4600 E. 63rd Street, Kansas City, MO 64130 until 2:00pm on **May 28, 2025**, when publicly opened and read. All Bids must comply with the Bidding Requirements of Kansas City, MO. Bids shall be submitted as sealed bids, be addressed to Director of Parks and Recreation, state on outside of envelope "Bid Enclosed", have Project title and number, and be deposited in the locked Bid box.

The proposed work includes:
Replacement of existing asphalt trail segments with new concrete trail, for segments of the Indian Creek Trail located between State Line Road and Locust St.

Plans and specifications are available at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org.
IPL0230742
May 1-2,4-9,11-16,18-23,25-28 2025

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:
250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.
IPL0229302
May 1,8 2025

NOTICE OF PUBLIC SALE:
Pursuant to MO Self-Service Storage Facilities Act & to satisfy Owner's lien Brighton StorTropolis will hold an online public auction of the personal property stored in units located at 8340 N Brighton Ave KCMO 64119 to satisfy Operator's lien. Everything sold is purchased AS-IS for CASH ONLY. See & bid on all units 24/7, sale ending on 05/15/2025 12:00 PM @ www.lockerfox.com. Auctions subject to cancellation at any time for any reason until winning bidder takes possession of property. TERMS listed on auction website.
IPL0226975
May 1 2025

NOTICE OF BID
Bids for High Voltage Electrical Services – Missouri State Fairgrounds / Statewide, Project No. IDIQMCA-5003, will be received by FMDC, State of MO, **UNTIL 1:30 PM, May 15, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0229110
Apr 28-May 2,4-8 2025

Advertisement for Bid
Bids for New Premium Campsites at Watkins Woolen Mill State Park and State Historic Site, Project No. X2220-01, will be received by FMDC, State of MO, **UNTIL 1:30 PM, May 22, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0228535
Apr 21-25,27-May 1 2025

INVITATION TO BID
Park Improvements
Project No. 70250037
Project Title: Swope Park Improvements ORLP Grant
Notice to Design Professionals
Design proposals for **Swope Park Improvements ORLP Grant – Project No. 70191308**, will be received at ***The Parks and Recreation Department*** of Kansas City, Missouri, 4600 E. 63rd Street Trafficway, Kansas City, Missouri 64130 until 4:00 O'Clock P.M. (Prevailing Local Time) on the 28th day of May, 2025.
The proposed work includes:
Project scope will include design services for park improvements in the northwest area of Swope Park including trails, playground, shelter and bandstand repairs, and multi-modal improvements.
This is a public improvement project for which the construction will be funded in part with Federal funds.
The Request for Qualifications/Proposals will be available online to all interested parties at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org. All addenda will be posted at this location. Any document or plan may be viewed or downloaded from this location.
The Parks and Recreation Department will hold a virtual Microsoft Teams pre-proposal conference at 2:00 PM on the 14th day of May, 2025. Meeting information is below:
Microsoft Teams Meeting
Meeting ID: 280 449 797 651
Passcode: 8FB7vb7z
Dial in by phone
+1 872-212-5076,,915254606#
Phone conference ID: 915 254 606#
Proposers are encouraged but not required to attend the pre-bid meeting.
Lisa Treese,
Project Manager
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7619 Phone
Email: lisa.treese@kcmo.org
Hillary Chaisson,
Contract Administrator
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7560 Phone
Email: hillary.chaisson@kcmo.org
The City of Kansas City, Missouri (OWNER) hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, businesses owned and controlled by socially and economically disadvantaged individuals will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, religion, creed, sex, age, ancestry or national origin in consideration for an award. Federal Land and Water Conservation Funds are being used in this project, and all relevant federal, state, and local requirements apply.
IPL0230814
May 1,8,15 2025

HAVING A GARAGE SALE?
Let Classifieds Help
THE KANSAS CITY STAR.
KANSASCITY.COM

Auctions

Garage Sales

Community Yard Sale
Leavenworth, KS. May 3. 203 units in Shenandoah neighborhood. Use 2300 Gettysburg Drive, Leavenworth in your phone to find us!

Animals

Dogs

AKC ROTTWEILER PUPPIES 660-464-2315



Golden Retriever Puppies
Purebred puppies ready for their forever homes. Parents are AKC registered. $1100. Located in Northeast KS. Call/text 785.285.8585 for more info and pics.



Enlish Cream Golden Puppy
Golden Retriever AKC F/M Vet Shots Champion Bloodines 660-287-6359

Mini Bernedoodle & Cockapoo
Puppies for sale! 816-383-0489
Midwestdoodleranch.com $1500+

Real Estate

For Sale

16716 E Hwy 40
5 bd Ranch w/ 3 units
Rented nets $5k/m. Group home
816-301-7187

Service Directory

Concrete

DRIVEWAYS.PATIOS.ETC
CONCRETE PROZ. Small ad small price. Text or call 816 616 7038. Thx

Junk/Trash/Debris Removal

So-KC Junk Hauling
Free estimates
Joe 913-901-7323

Lawn/Garden/Landscaping/Trees

Clif's Outdoors * 913-300-1657
Accepting new mowing customers 2025 season, incl. residential, commercial, field, small apts., and estates.

SHRUB REMOVAL
Tim 913-620-1092

TOO MUCH STUFF?
Let Classifieds Help
THE KANSAS CITY STAR.
KANSASCITY.COM



KC Star file photo

Then playing for Kansas, Lagerald Vick whips a pass around K-State's Xavier Sneed and Dean Wade during a 2019 Big 12 game men's basketball game at Bramlage Coliseum in Manhattan.

Two former Kansas Jayhawks sign up for KU's alumni entry in summertime TBT

BY GARY BEDORE
gbedore@kcstar.com

Former University of Kansas men's basketball guards Nick Timberlake and Lagerald Vick on Tuesday became the first two players to commit to playing for JHX Hoops, KU's alumni entry in The Basketball Tournament (TBT 2025).

JHX Hoops will co-host the TBT's Kansas City Regional with Kansas State's alumni team, Purple Reign. The regional will be held July 19-23 at Kansas City's Municipal Auditorium.

Additional roster announcements will be made in coming weeks.

This will be the third straight summer Vick plays for KU's alumni team, formerly known as Mass Street.

Vick has averaged 10.7 points and 3.3 rebounds per game in TBT in the last two years, helping lead the Kansas alumni to back to back regional final appearances.

Vick spent four years at Kansas (2015-19). He began his professional career in Taiwan in 2019 and has since played professionally across South America and New Zealand.

Timberlake will be making his TBT debut for JHX Hoops. He competed at KU in 2023-24. He spent spent his first professional season playing in Portugal and England.

The winner of the Kansas City Regional will advance to TBT's quarterfinals on July 28. The semifinals will be held on July 31, and TBT's $1 million championship will be played on Aug. 3.

For the first time, TBT will give each host team the opportunity to have home court advantage for the quarterfinals, semifinals and the $1 million championship game. Should two regional hosts face off, the tiebreaker will be determined by which host sells 4,000 tickets first.

For more information on this year's TBT or JHX Hoops, visit tbthoops.com.

Gary Bedore: 816-234-4068, @garybedore

No KU Jayhawks or KSU Wildcats are invited to NBA pre-draft events this year

BY GARY BEDORE
gbedore@kcstar.com

Kansas Jayhawks seniors Hunter Dickinson, Dajuan Harris, Zeke Mayo and Shakeel Moore will not be attending the 2025 NBA G League Elite camp Friday through Sunday at Wintrust Arena in Chicago.

Their names, as well as the names of Kansas State men's hoops players Coleman Hawkins and David N'Guessan, were not among the 45 pro prospects asked to participate in strength and agility drills and 5-on-5 games. Those 45 will also have their measurements taken in front of scouts, front office executives and coaches at the weekend event.

Seventy-five pro prospects were asked to attend the 2025 NBA Draft Combine, which runs Sunday through May 18 in the Windy City.

Incoming KU senior wing Melvin Council Jr., a transfer from St. Bonaventure who has entered his name in the 2025 NBA Draft, was not invited to either pre-draft event. He has until May 28 to remove his name from the draft if he wishes to play a final season of college basketball at KU.

Missouri's Tamar Bates and Caleb Grill received invitations to the G League camp Monday with Big 12 players Keshon Gilbert and Curtis Jones of Iowa State; Caleb Love of Arizona; Chance McMillan of Texas Tech; and Joson Sanon of Arizona State.

If the two Tigers fare well at G League camp, they could be extended invitations to stay in Chicago for the Combine.

Player agents are free to set up workouts with individual NBA teams in advance of the NBA Draft, slated for June 25-26 in Brooklyn.

Texas Tech's Darrion Williams and St. John's R.J. Luis, who are in both the draft pool and transfer portal, have been invited to attend the NBA Draft Combine Sunday through May 18 in Chicago. Both are considering KU as transfer destinations.

Big 12 players who have been invited to the 2025 NBA Combine include: Carter Bryant, Arizona; Egor Demin, BYU; VJ Edgecombe, Baylor; Javon Small, West Virginia and Milos Uzan, Houston.

There is still a slight chance KU's Mayo, a 6-4 senior from Lawrence, could return for a fifth college season. He has entered his name in the NCAA transfer portal with a no-contact tag in case the NCAA approves a proposed rule granting fourth-year players a fifth season.

Gary Bedore: 816-234-4068, @garybedore



DOMINICK WILLIAMS dowilliams@kcstar.com

Kansas Jayhawks guard Zeke Mayo celebrates after hitting a 3-pointer in the second half of the Big 12 Championship quarterfinal game vs. the Arizona Wildcats on Thursday, March 13, 2025 at T-Mobile Center.

THE KANSAS CITY STAR.
SPORTS
The latest sports news with recaps, commentary and analysis beyond the game.
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SELL YOUR STUFF FAST!
816.234.4636

Legals

BCCM Construction Group

Invitation to Bid

BCCM Construction Group, Inc. and K&J Builders, LLC, will be accepting bids on the 929 Walnut Apartments Building in Kansas City, MO 64106 on May 9,2025, by 3 p.m.

The project is a new 8-story, 45-unit aparatment building. MBE and WBE participation is required, at 15% each.

The prebid walk-through is scheduled for May 1, 2025, at 10:00 a.m.

Any bidding documents and or requests should be sent to estimating@bccmconstruction.com or call 816-659-9115

NOTICE OF BID
Bids for High Voltage Electrical Services – Missouri State Fairgrounds / Statewide, Project No. IDIQMCA-5003, will be received by FMDC, State of MO, **UNTIL 1:30 PM, May 15, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0229110
Apr 28-May 2,4-8 2025

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:
250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.
IPL0229302
May 1,8 2025

ADVERTISEMENT FOR BID
Bids for Renovate Interior & Exterior at Trenton Readiness Center, Project No. T2405-01, will be received by FMDC, State of MO, **UNTIL 1:30 PM, June 12, 2025**. Project information available at: http://oa.mo.gov/facilities
IPL0229609
May 5-9,11-15 2025

NOTICE OF ACCEPTANCE OF BIDS
Notice is hereby given that the Liberty Public School District No. 53 will receive bid proposals for the following:

ROOF IMPROVEMENTS – STADIUM PRESS BOXES

The District reserves the right to reject any or all bids and waive any informality. Copies of bid documents may be secured by emailing Jason Breit, Director of Purchasing at jason.breit@lps53.org.

Sealed bids must be submitted by 1:00 PM CST, Tuesday, May 13, 2025 at which time all bid proposals received will be publicly opened.

Bids should be delivered to:
Liberty Public Schools
Support Services Center
801 Kent St
Liberty, MO 64068
Attn: Jason Breit
Director of Purchasing
816-736-5358
IPL0230564
May 1,8 2025

INVITATION TO BID
Park Improvements
Project No. 70250037
Project Title: Swope Park Improvements ORLP Grant
Notice to Design Professionals
Design proposals for **Swope Park Improvements ORLP Grant – Project No. 70191308**, will be received at ***The Parks and Recreation Department*** of Kansas City, Missouri, 4600 E. 63rd Street Trafficway, Kansas City, Missouri 64130 until 4:00 O'Clock P.M. (Prevailing Local Time) on the 28th day of May, 2025.
The proposed work includes:
Project scope will include design services for park improvements in the northwest area of Swope Park including trails, playground, shelter and bandstand repairs, and multi-modal improvements.
This is a public improvement project for which the construction will be funded in part with Federal funds.
The Request for Qualifications/Proposals will be available online to all interested parties at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org. All addenda will be posted at this location. Any document or plan may be viewed or downloaded from this location.
The Parks and Recreation Department will hold a virtual Microsoft Teams pre-proposal conference at 2:00 PM on the 14th day of May, 2025. Meeting information is below:
Microsoft Teams Meeting
Meeting ID: 280 449 797 651
Passcode: 8FB7vb7z
Dial in by phone
+1 872-212-5076,,915254606#
Phone conference ID: 915 254 606#
Proposers are encouraged but not required to attend the pre-bid meeting.
Lisa Treese,
Project Manager
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7619 Phone
Email: lisa.treese@kcmo.org
Hillary Chaisson,
Contract Administrator
Parks and Recreation Department
4600 E. 63rd St.
Kansas City, MO 64130
816-513-7560 Phone
Email: hillary.chaisson@kcmo.org
The City of Kansas City, Missouri (OWNER) hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, businesses owned and controlled by socially and economically disadvantaged individuals will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, religion, creed, sex, age, ancestry or national origin in consideration for an award. Federal Land and Water Conservation Funds are being used in this project, and all relevant federal, state, and local requirements apply.
IPL0230814
May 1,8,15 2025

NOTICE OF PROPOSED PURCHASE AND ASSUMPTION TRANSACTION
Notice is hereby given that application has been made to the Comptroller of the Currency, Western District Office, Independence Plazs 1050 17th Street, Suite 1500, Denver, Colorado 80265-1050, for consent to the purchase and assumption by UMB Bank, n.a., 1010 Grand Boulevard, Kansas City, Missouri 64106, of certain Health Savings Accounts for which Old National Bank, One Main Street, Evansville, Indiana 47708, has assumed the role of custodian following the closure of the merger transaction between Old National Bank and Bremer Bank, National Association. It is contemplated that the main office and branch offices of each of UMB Bank, n.a. and Old National Bank will continue to be operated by such bank after the completion of the assumption by UMB Bank, n.a. of the Health Savings Accounts form Old National Bank in the above-described transaction.

This notice is published pursuant to 12 USC 1828(c) and 12 CFR 5. Any one desiring to comment on this application may do so by submitting written comments no later than June 7, 2025 to: Director of District Licensing, Comptroller of the Currency, Western District Office, Independence Plaza 1050 17th Street, Suite 1500, Denver, Colorado 80265-1050, or LicensingPublicComments@occ.treas.gov.

The public may find information regarding this application, including the date of the end of the public comment period, in the OCC Weekly Bulletin at www.occ.gov. Requests for a copy of the public file on the application should be made to the Director of District Licensing.

May 8, 2025

UMB Bank, n.a., Kansas City, Missouri

Old National Bank, Evansville, Indiana
IPL0231632
May 8,15,Jun 2 2025

INVITATION TO BID
Notice to Contractors
Sealed bids will be received by Kansas City Parks and Recreation Dept. at 4600 E. 63rd Street, Kansas City, MO 64130 until 2:00pm on **May 28, 2025**, when publicly opened and read. All Bids must comply with the Bidding Requirements of Kansas City, MO. Bids shall be submitted as sealed bids, be addressed to Director of Parks and Recreation, state on outside of envelope "Bid Enclosed", have Project title and number, and be deposited in the locked Bid box.
The proposed work includes:
Replacement of existing asphalt trail segments with new concrete trail, for segments of the Indian Creek Trail located between State Line Road and Locust St.

Plans and specifications are available at the Kansas City, Missouri Plan Room, http://www.kcmoplanroom.org.
IPL0230742
May 1-2,4-9,11-16,18-23,25-28 2025

Auctions

Auctions

PETTIS COUNTY, MO LAND AUCTION - TRIPLE G ENTERPRISES LLC
Thursday, June 5, 2025 at 10:00 AM Central
57 acres: • 1 tract
The Triple G Enterprises LLC land is located 13.8 miles northeast of Sedalia, MO. Take Highway 65 north of Sedalia 11 miles to Highway J. Go east on Highway J 2.5 miles to Longwood Road. Turn left onto Longwood Road and follow 0.3 miles to property on the west side of Longwood Road. The land is further described as being located in Section 12, T47N-R21W, Pettis County, Missouri.
The land represents productive cropland.

Animals

Dogs

Mini Bernedoodle & Cockapoo
Puppies for sale! 816-383-0489
Midwestdoodleranch.com $1500+



Weimaraner Puppies
9 weeks old, current shots, parents on site. call or text 402-432-8138

Small Breed Puppies 4 Sale
bandgkennels.com - $650 & up
816-261-4517 / 660-224-2423

chihahua
8wk pups,blk w/tan marking, fawn, brindle. f&m's asst price 475-550. 816 288 0696 text only

Automotive

Autos for Sale

1998 Corvette Coupe
Automatic w/18,000 Original Miles, Silver w/Black Interior. Always garaged, Excellent Condition, $24,000, Pittsburg, Ks. 1-620-231-7494

THE KANSAS CITY STAR.
KANSASCITY.COM

Merchandise

Miscellaneous

Chiefs Season Tickets Wanted!
I will Buy your 2025 Season Tickets. Top $ Paid! Please call 800-786-8425 ext 2

Service Directory

Concrete

DRIVEWAYS.PATIOS.ETC
CONCRETE PROZ. Small ad small price. Text or call 816 616 7038. Thx

Junk/Trash/Debris Removal

So-KC Junk Hauling
Free estimates
Joe 913-901-7323

Lawn/Garden/Landscaping/Trees

Clif's Outdoors * 913-300-1657
Accepting new mowing customers 2025 season, incl. residential, commercial, field, small apts., and estates.

SHRUB REMOVAL
Tim 913-620-1092

Clif's Outdoors * 913-300-1657
Experienced groundskeeper seeking small apt. complex/estate owner for personal groundskeeping care. Website at *www.clifsoutdoors.com* shows my skills. **913-300-1657**

NEED A LITTLE EXTRA HELP AROUND THE HOUSE?
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THE KANSAS CITY STAR.
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4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477 • tips@tips-usa.com

April 22, 2025

The Journal Record

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

The Journal Record
211 N. Robinson
Oklahoma City, OK, 73102
Phone: 405-278-2801 Fax: -

THE JOURNAL RECORD

Affidavit of Publication

To: Region 8 Education Service Center - Shelley Black
4845 US Hwy 271 N
Pittsburg, TX, 756864303

Re: Legal Notice 4052962, Notice to Bidders

State of Oklahoma }
} SS:
County of Oklahoma }

I, Natasha Stewart, of lawful age, being duly sworn upon oath, deposes and says that I am the Authorized Designee of The Journal Record, a daily publication that is a "legal newspaper" as that phrase is defined in 25 O.S. Section 106, as amended to date, for the City of Oklahoma City, for the County of Oklahoma in the State of Oklahoma. The attachment hereto contains a true and correct copy of what was published in The Journal Record in consecutive issues on the following date(s):
PUBLICATION DATES: 05/01/2025 and 05/08/2025

(MS4052962)

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

250502 Elevators and Servicing (2 Part with JOC)

250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds)

Supplies, Equipment, Tool Rental, Sales and Services

250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

(5-1, 5-8-25)

Publishers fee: $26.10

By: 

Natasha Stewart

Sworn to me on this 8th day of May 2025

MaRanda Beeson

By: 

MaRanda Beeson
Notary Public, State of OK
No. 10001243
Qualified in Oklahoma County
My commission expires on February 18, 2026

courtroom in the Oklahoma County Courthouse. Should you know of some reason why this change of name should not be allowed you must file a written protest in the above styled and numbered cause prior to the above date with the Clerk of this Court. Should you fail to do so, the petition for change of name may be granted as prayed.

RICK WARREN
(SEAL)
Court Clerk
By Deputy
(5-1-25)

(MS4053101)
NOTICE OF PETITION FOR PUBLICATION
Case No. CV-2025-1025

IN THE DISTRICT COURT OF OKLAHOMA COUNTY STATE OF OKLAHOMA

In the Matter of the Application of: Maria Isabel Olvera Fonseca and Baldomero Zamora Soto, as next best friends of: Bryan Zamora-Olvera, Jennifer Zamora-Olvera, Jocelyn Zamora-Olvera, Jessica Zamora-Olvera, Brianna Zamora-Olvera, and Alexander Zamora-Olvera, Minor Children, to Change Names on Certificates of Live Birth

TAKE NOTICE THAT:

Maria Isabel Olvera Fonseca, as natural mother and Baldomero Zamora Soto, as biological father of Bryan Zamora-Olvera, Jennifer Zamora-Olvera, Jocelyn Zamora- Olvera, Jessica Zamora-Olvera, Brianna Zamora-Olvera, and Alexander Zamora-Olvera, have petitioned the District Court of Oklahoma County for an Order to correct their full legal names' on the minor children: Bryan Zamora-Olvera, Jennifer Zamora-Olvera, Jocelyn Zamora-Olvera, Jessica Zamora-Olvera, Brianna Zamora-Olvera, and Alexander Zamora- Olvera, birth certificates; to MARIA ISABEL OLVERA FONSECA and BALDOMERO ZAMORA SOTO

The hearing on said Petition will be heard on the 2nd day of July, 2025, at 1:30 o'clock p.m., before the Honorable Judge Andrews, Judge of the District Court of Oklahoma County, Oklahoma County Courthouse, Oklahoma City, Oklahoma.

Any person may file a written protest in this matter prior to the date for hearing

RICK WARREN
(SEAL)
Court Clerk
By Deputy

Tamer Shawareb, P.C., OBA #19567
228 Robert S. Kerr, Suite 715
Oklahoma City, OK 73102
Telephone No.:(405) 228-2552
Fax No.: (405) 228-2525
tshawareb@yahoo.com
Attorney for Petitioner
(5-1-25)

Construction

(MS4052867)
NOTICE TO BIDDERS
INVITATION TO BID NUMBER 2425-55

The City of Norman, Oklahoma, will receive sealed bids in the Office of the City Controller, Purchasing Division of the City of Norman, located at 225 N. Webster Ave., Development Center, Norman, Oklahoma 73069, until 2 P.M., local time, Thursday, May 29, 2025 for furnishing all required materials, equipment, tools and labor to perform all necessary work for the

FYE 2026 Concrete Sidewalk Projects

Bids will not be accepted after 2:00 pm at which time bids will be opened and read aloud. The project consists of sidewalk, driveway and curb and gutter removal and placement. Bidders are expected to inspect the site(s) of the work and to inform themselves regarding all local conditions.

Project Documents including Specifications and Maps may be obtained at the Office of the City Engineer located at 225 N. Webster Ave., Norman, Oklahoma at no cost. Any person with disabilities, requiring special accommodations shall contact the City of Norman-City Controller, Purchasing Division no later than 7 days prior to bid opening.

A non-mandatory Pre-bid Conference will be held on Thursday, May 15, 2025 from 11:00 a.m. to 12:00 p.m. in Conference Room B, located at 225 N Webster Ave., Norman, Oklahoma 73069. Questions related to this contract will be answered up to 4:00 p.m. on Wednesday, May 21, 2024.

All bids must be marked with the following statement: Bid for the "FYE 2026 Concrete Sidewalk Projects"

THE CITY RESERVES THE RIGHT TO REJECT ANY AND ALL BIDS.
(5-1, 5-8-25)

(MS4052870)
INVITATION TO BIDDERS

The OKC Fairgrounds, hereinafter referred to as Owner and Flintco, LLC hereinafter called the Construction Manager, will receive SEALED bids to provide the work included in the OKC Fairgrounds - Gateway of Champions Promenade in Oklahoma City, Oklahoma, on May 29, 2025 at 2:00 PM CST. All properly sealed and labeled bids will be received at the Flintco Office 1225 N. Broadway, STE 105 OKC, OK 73103 at which time proposals will be opened and read aloud.

Bid Phase 2: May 29, 2025 at 2:00 PM CST Pre-Bid - May 12, 2025 at 10:00 AM CST
Bid Package 03A - Concrete
Bid Package 04A - Masonry
Bid Package 07A - Roofing
Bid Package 08A - Doors/ Frames/Hardware
Bid Package 13A - Pre-Engineered Metal Building
Bid Package 24A - Plumbing and Mechanical
Bid Package 26A - Electrical
Bid Package 31A - Earthwork
Bid Package 33A - Utilities

All bids are to be sealed and CLEARLY labeled by describing the project and indicating the package being bid, on the envelope as described in the Instructions to Bidders. A Bid Security, as stipulated in the bid documents, in the amount of 5% of the bid shall accompany the sealed proposal of each bidder if the amount of the bid exceeds $50,000.

Bids received more than ninety-six (96) hours, excluding Saturdays, Sundays, and Holidays, before time set for opening bids, as well as bids received after time set for opening bids, will not be considered and will be returned unopened.

The Contract and Bidding Documents will be available for examination beginning February 25, 2025 at the main office of the Construction Manager between the hours of 8:00 a.m. to 5:00 p.m., Monday through Friday. Please contact Josh Patterson or Mike Atkinson with Flintco at okcestimating@flintco.com with any questions about bid procedures or documents. Copies of the contract and bidding documents, including the drawings and specifications, may also be reviewed at the Dodge Plan Room, Southwest Construction News and Bid News Construction Reports.

The Owner and Construction Manager will conduct a pre-bid conference at the1225 N. Broadway STE 105, OKC, OK 73103 for the purpose of review of the bidding documents, bidding procedures and to receive Bidders' questions. The pre-bid conference is scheduled for as noted above.

All Bidders for this project are required to meet all qualification requirements as established in these bid documents. Upon receipt of an acceptable bid, the contract will be awarded within sixty (60) days after opening bids and the written contract executed within ninety (90) days thereafter.

The Owner reserves the right to reject any or all bids or to waive any informalities or irregularities in the bidding.
(5-1, 5-8-25)

(MS4052893)
ADVERTISEMENT FOR BID
Project: NW Classen High School Addition

Oklahoma City Public Schools (OKCPS) Independent School District #89 of Oklahoma County, c/o Lippert Bros., Inc. acting as Construction Manager, is taking separate sealed bids on various Bid Packages for Bid Group #3 for NW Classen High School Addition project, located at 2801 NW 27th Street, Oklahoma City, OK 73107. Bids will be received at Lippert Bros., Inc.'s offices located at 2211 E. I-44 Service Road, Oklahoma City, OK 73111 no later than May 22, 2025 at 2:00 p.m. Bids will be opened and read out loud.

Any bids that are submitted via shipping carrier must be sent to Lippert Bros., Inc., Construction Manager, to 2211 East I-44 Service Road, Oklahoma City, OK 73111 and received prior to 1:00 p.m. on May 22, 2025, to be deemed admissible as a bid to be opened at 2:00 p.m. the same day.

Said bids will be publicly opened and read aloud following the time stated above. Bids received more than ninety-six (96) hours, excluding Saturdays, Sundays, and Holidays, before the time set for opening bids, as well as bids received after the time set for opening of bids, will not be considered, and will be returned unopened.

Owner
Oklahoma City Public Schools (OKPS)
2500 NE 30th Street
Oklahoma City, OK 73111
Architect
JHBR Architecture
600 NE 4th Street, Suite 200
Oklahoma City, OK 73104
Construction Manager:
Lippert Bros., Inc.
Physical: 2211 E. I-44 Service Road, Oklahoma City, OK 73111
Mailing: PO Box 17450, Oklahoma City, OK 73136-1450
Phone : 405-478-3580, Fax : 405-478-3301
Shane VanOosten
svanoosten@lippertbros.com
Project Description :
Bid Group #3 consists of the
Bid Packages Contained in this Advertisement for Bid Group No. 03
07.3 Metal Plate Wall Panels
09.3 Painting and Wall Coverings - Re-bid
11.0 Food Service
12.1 Furniture, Fixtures and Equipment
Availability of Bidding Documents:
Contract documents will be on file at the Construction Manager's Office, Bid News/iSqFt and Reidprographics. Bidders may also obtain electronic access to bid documents by applying to the office of the Construction Manager.
Pre-Bid Conference:
A non-mandatory pre-bid conference will be held on May 14, 2025 at 3:30 p.m. located at Northwest Classen High School located at 2801 NW 27th Street, Oklahoma City, OK 73107. Attendees to go to the main entrance to the building on the southwest side of the building to be directed on the meeting room location.
Notes: Bids over $50,000 will be required to include payment and performance bond bonds in their bid amount. Additional bid packages may be issued later as required. Women-owned and minority business enterprises are encouraged to participate in this project. A 5% Bid Bond or Certified or cashier's check is required for bids more than $50,000.00. The Owner has the right to reject any or all bids.
(5-1, 5-8-25)

(MS4052903)
OKLAHOMA CITY PUBLIC SCHOOLS

Sealed Quotations are requested by the Board of Education of the Oklahoma City Public Schools, District I-89, Oklahoma County, Oklahoma, electronically to bids@okcps.org, no later than the listed date for furnishing:

RFP 26-023 Grease Trap Services (Bid Closes May 22, 2025 @ 2:00pm)

The Board of Education of Independent School District I-89 of Oklahoma County, Oklahoma, is under no obligation to accept any proposal and reserves the right to accept or reject any or all proposals. The Board of Education also reserves the right to make such selections as in its judgment is best suited for the purpose intended.

INSTRUCTIONS:

All proposals shall be submitted electronically, in compliance with the Request for Proposal (RFP) document. Additional RFP documents, specifications and/or description of equipment and/or services desired, are available by emailing bids@okcps.org. All proposals shall adhere to the conditions as set forth in the bid document.

The Oklahoma City Public School District is committed to a policy of equal employment opportunity and affirmative action, and does not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin, or handicap. Utilization of any agency for goods and services is predicated upon it adherence to a similar policy of nondiscrimination and affirmative action.
(5-1-25)

(MS4052962)

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds)
Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.
(5-1, 5-8-25)

(MS4053082)
SOLICITATION FOR BIDS (BID NOTICE)

Sealed bids will be received by Edmond Public Schools, c/o Dowell-Pontikos Construction, as Construction Manager for the Edmond Public Schools, 200 N. Kelly, Edmond, OK 73034, up to and including the date and time indicated below, and will be opened and read aloud publicly at Edmond Public Schools after the time indicated. Complete sets of the Bidding Documents, including a Contractor's Qualification Statement, General and Supplemental Conditions, Specifications and Construction Plans are on file in the offices of the Construction Manager, 617 NW 27th St., Moore, OK 73160 and are open for public inspection. PDF Files of the drawings and Specs may be obtained by contacting Dowell Pontikos Construction (Sarah Short), at the above address or at: Phone: 405-735-7385 Email: sarah@dowellpontikos.com

Project Name: Edmond Santa Fe Freshman Academy (Site Packages Only)
Bid Package 1-Site Demo
Bid Package 2-Utilities
Bid Package 3-Partial Site Concrete
Project Location: 1901 W. 15th St. Edmond, Ok 73013
Cost Estimate: $1,500,000.00
Bid Documents Available: Electronic Files or Hard Copies
Fee for Bid Documents: Electronic Files (Free) Hard Copies ($600.00)
Bid Opening Date: Wednesday, May 28th, 2025
Bid Opening Time: 1:00 P.M.
Contact Person (s): Jon Dowell
Dowell Pontikos Construction
Construction Manager for Edmond Public Schools
Phone: 405-735-7385
Email: Jon@dowellpontikos.com
Bid Bond:

If a bid exceeds $50,000, a cashier's check, a certified check or surety bid bond in the amount of five percent (5%) of the total bid shall accompany the sealed bid of each bidder, designating the Edmond Public Schools and Dowell-Pontikos Construction as dual obligees. Security checks will be returned to all but the three lowest bidders after the bid opening. The three lowest bid securities will be retained as provided in the Instructions to Bidders.

Bids received more than ninety-six (96) hours, excluding Saturday, Sundays and holidays, before the time set for opening of bids, as well as bids received after the time set for opening bids, will not be considered and will be returned unopened. The Owner/Construction Manager reserve the right to reject any or all bids and to waive all formalities or minor irregularities. The time period within which a Subcontract Agreement will be executed following award to the successful bidder is ten (10) days.
(5-1, 5-8-25)

(MS4047928)
Request for Proposals

Deer Creek Public Schools will be receiving sealed bid RFQ's for our Fire Alarms & Sprinkler System Servicing, Maintenance, and Monitoring System. Bids will be received until 2:00 p.m. May 8, 2025, then opened and read aloud at 2:15 p.m. Deer Creek Board of Education reserves the right to reject any or all bids and waive any formalities. The Deer Creek Public Schools will be holding a Mandatory Bid Meeting and Walk Through for those interested in submitting a bid for any of these Request For Quotes (RFQ). The meeting will be held on Wednesday, April 23, 2025 at 10:00 A.M. at our Administration Building (20701 NW MacArthur Edmond, OK, 73012). On the NW corner of the Roundabout.
(4-14 through 5-8-2025)

(MS4050980)
INVITATION TO BID

The Oklahoma City Housing Authority (OCHA) located at 1700 Northeast Fourth Street, Oklahoma City, Oklahoma, is requesting sealed bids for OCHA Lilyfield Renovation (IFB-25001). ALL BIDDERS MUST REGISTER with the Housing Agency Marketplace (HAM) at the following link:ha.internationaleprocurement.com. A Prebid Conference will be held at 9:00am., Thursday, May 1, 2025, at 1607 SW 15th Street, Oklahoma City, Oklahoma. Attendance is encouraged for all interested bidders. Questions and requests for substitutions must be submitted online via the HAM website by 1:00 p.m., Wednesday, May 7, 2025. Sealed bids shall be delivered to 1700 Northeast Fourth Street before 1:30pm on May 16, 2025 at which time bids will be publicly opened and read aloud. The Oklahoma City Housing Authority is an Equal Employment Opportunity and Equal Housing Opportunity entity.
(4-24, 5-1-25)

(MS4051876)
NOTICE OF SOLICITATION TO BID
Bid #2-SFB-25-014
OKLAHOMA CITY COMMUNITY COLLEGE CAMPUS PAVING REPAIRS FY2025

ANNOUNCEMENTS ON THE DAY OF BID OPENING SUPERSEDE ALL OTHER ANNOUNCEMENTS, ORAL OR WRITTEN.

Oklahoma City Community College will conduct a sealed bid process with public bid opening on **Thursday, May 22, 2025**. Sealed bids must be received by **2:00 p.m. CST** with public bid opening beginning immediately following in the OCCC John Massey Center, Room 143.

A mandatory Pre-Bid meeting will be held for this project on Friday, May 9, 2025 on the OCCC Main Campus, Library Room 407, 7777 South May Avenue, Oklahoma City, OK beginning at 10:00 a.m. CST. Notification of attendance must be made prior to the pre-proposal conference.

For additional information and a bid packet access visit https://www.occc.edu/purchasing/bid/ or contact Craig Sisco, Purchasing Director at michael.c.sisco@occc.edu.
(4-29, 4-30, 5-1, 5-2, 5-5, 5-6, 5-7, 5-8, 5-9-25)

Miscellaneous

(MS4042193)
WAIVER CONSENT NOTICE

From: The Church of The Servant
1027 NE 63rd Street
Oklahoma City, OK 73111
To: Whom it may concern
Re: Waiver Consent Notice

I, Pastor Michael Alexander, of the Church Triumphant, am formally writing this Written Consent Waiver notice to Springlake Loung, LLC, 3725 Springlake Dr., OKC, OK, 73111, referencing the ABLE Commission to waive the 300 ft. requirement of a Church, Title 37A, Section 2-139 of the Oklahoma Statutes Laws, for Springlake Lounge, LLC, to acquire any needed licenses for the sake of conducting business at their facility.

Please feel free to contact me if you have any questions or concerns.
(405) 886-0047
Pastor Michael Alexander
s/Michael Alexander, Pastor
The Church Triumphant Ministries
(3-27 through 5-6-2025)

(MS4051220)

The City of Oklahoma City, Oklahoma Public Works Department, in accordance with National Flood Insurance Program regulation 65.7(b)(1), hereby gives notice of the City of Oklahoma City, Oklahoma intent to revise the flood hazard information, generally located between SW 36th Street and SW 29th Street along South MacArthur Boulevard. Specifically, the flood hazard information shall be revised along North Canadian River Tributary 13 from a point approximately 665 feet south of SW 29th Street to a point approximately 1,575 feet south of SW 29th Street.

As a result of the revision, the floodway shall widen and narrow and be established the 1% annual chance water- surface elevations shall increase and decrease, and the 1% annual chance floodplain shall widen and narrow and be established within the area of revision.

Maps and detailed analysis of the revision can be reviewed at the City of Oklahoma City at 420 West Main Street, Oklahoma City, Oklahoma. Interested persons may call Blaine Sheffield at 405-297-2581 for additional information from 8 am to 5 pm Monday -- Friday.
(4-24, 5-1-25)

Hearings and Minutes

(CD4052823)
NOTICE OF HEARING
Cause CD No 2025-001420

BEFORE THE CORPORATION COMMISSION OF THE STATE OF OKLAHOMA

APPLICANT: CAMINO NATURAL RESOURCES, LLC. RELIEF SOUGHT: MULTIUNIT HORIZONTAL WELL. LEGAL DESCRIPTION: Section 31, Township 10 North, Range 6 West of the IM, and Section 6, Township 9 North, Range 6 West of the IM, Grady County, Oklahoma

STATE OF OKLAHOMA TO: All persons, owners, producers, operators, purchasers and takers of oil and gas, and all other interested persons, particularly in Grady County, Oklahoma, including the following: 89 ENERGY II MINERALS, LLC; A.E. EWELL INVESTMENT CO.; A.E. EWELL INVESTMENT CO.; ALBERT ODOM; ALBERT ODOM; AMY BETH LONG; ARAPAHO LAND COMPANY LLC; BARBARA ANNE LASSITER; BETTY JO CULP; BETTY JO CULP BARROW; BETTY LOU COX; BROWN FAMILY TRUST DATED 01/08/14, AND THE TRUSTEE OF SUCH TRUST; BROWN FAMILY TRUST DATED 01/08/14, AND THE TRUSTEE OF SUCH TRUST; CARL ODOM, DECEASED; CARLA GIBSON; CARLA GIBSON; CAROLINE M. KILGO, TRUSTEE OF THE CAROLINE M. KILGO TRUST UNDER AGREEMENT DATED

License Applications

(MS4053092)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Feast, LLC dba Feast,The World's Buffet Tejal Patel 6512 NW Expressway Oklahoma City OK 73132 a Limited Liability Company hereby publishes notice of it intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Mixed Beverage License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Mixed Beverage establishment with business premises located at 6512 NW Expressway Oklahoma City OK 73132 in Oklahoma City, Oklahoma County, Oklahoma, under the business name of Feast, LLC dba Feast The World's Buffet

Dated this 28th day of April, 2025.

Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Tejal Patel

County of Oklahoma, State of Oklahoma.

Before me, the undersigned notary public, personally appeared: Tejal Patel to me known to be the person(s) described in and who executed the foregoing application and acknowledged that She executed the same as Her free act and deed.

Sadia K. Cheema
(Seal)
Notary Public
My commission expires September 25, 2026, #22012975
(5-1, 5-8-25)

(MS4051095)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Lotspot LLC dba Breeze In & Out Md Robiul Awal Bhuiyan,112 S Bryant Ave, Edmond, OK, 73034 a/an Limited Liability Company hereby publishes notice of it intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Retail Wine License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Retail Wine establishment with business premises located at 112 S Bryant Ave, Edmond, OK, 73034 in Edmond, Oklahoma County, Oklahoma, under the business name of Lotspot LLC dba Breeze In & Out

Dated this 21st day of April, 2025.

Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Md Robiul Awal Bhuiyan

County of Oklahoma, State of Oklahoma.

Before me, the undersigned notary public, personally appeared: Md Robiul Awal Bhuiyan to me known to be the person(s) described in and who executed the foregoing application and acknowledged that He executed the same as His free act and deed.

SADIA K. CHEEMA
(Seal)
Notary Public
My commission expires September 25, 2026, #22012975
(4-24, 5-1-25)

Specifications and Maps may be obtained at the Office of the City Engineer located at 225 N. Webster Ave., Norman, Oklahoma at no cost. Any person with disabilities, requiring special accommodations shall contact the City of Norman-City Controller, Purchasing Division no later than 7 days prior to bid opening.
A non-mandatory Pre-bid Conference will be held on Thursday, May 15, 2025 from 11:00 a.m. to 12:00 p.m. in Conference Room B, located at 225 N Webster Ave., Norman, Oklahoma 73069. Questions related to this contract will be answered up to 4:00 p.m. on Wednesday, May 21, 2024.
All bids must be marked with the following statement: Bid for the "FYE 2026 Concrete Sidewalk Projects"
THE CITY RESERVES THE RIGHT TO REJECT ANY AND ALL BIDS.
(5-1, 5-8-25)

(MS4052870)
INVITATION TO BIDDERS

The OKC Fairgrounds, hereinafter referred to as Owner and Flintco, LLC hereinafter called the Construction Manager, will receive SEALED bids to provide the work included in the OKC Fairgrounds - Gateway of Champions Promenade in Oklahoma City, Oklahoma, on May 29, 2025 at 2:00 PM CST. All properly sealed and labeled bids will be received at the Flintco Office 1225 N. Broadway, STE 105 OKC, OK 73103 at which time proposals will be opened and read aloud.

Bid Phase 2: May 29, 2025 at 2:00 PM CST Pre-Bid - May 12, 2025 at 10:00 AM CST
Bid Package 03A - Concrete
Bid Package 04A - Masonry
Bid Package 07A - Roofing
Bid Package 08A - Doors/ Frames/Hardware
Bid Package 13A - Pre-Engineered Metal Building
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Bid Package 26A - Electrical
Bid Package 31A - Earthwork
Bid Package 33A - Utilities

All bids are to be sealed and CLEARLY labeled by describing the project and indicating the package being bid, on the envelope as described in the Instructions to Bidders. A Bid Security, as stipulated in the bid documents, in the amount of 5% of the bid shall accompany the sealed proposal of each bidder if the amount of the bid exceeds $50,000.

Bids received more than ninety-six (96) hours, excluding Saturdays, Sundays, and Holidays, before time set for opening bids, as well as bids received after time set for opening bids, will not be considered and will be returned unopened.

The Contract and Bidding Documents will be available for examination beginning February 25, 2025 at the main office of the Construction Manager between the hours of 8:00 a.m. to 5:00 p.m., Monday through Friday. Please contact Josh Patterson or Mike Atkinson with Flintco at okcestimating@flintco.com with any questions about bid procedures or documents. Copies of the contract and bidding documents, including the drawings and specifications, may also be reviewed at the Dodge Plan Room, Southwest Construction News and Bid News Construction Reports.

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All Bidders for this project are required to meet all qualification requirements as established in these bid documents. Upon receipt of an acceptable bid, the contract will be awarded within sixty (60) days after opening bids and the written contract executed within ninety (90) days thereafter.

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(5-1, 5-8-25)

(MS4052893)
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Project: NW Classen High School Addition

Oklahoma City Public Schools (OKCPS) Independent School District #89 of Oklahoma County, c/o Lippert Bros., Inc. acting as Construction Manager, is taking separate sealed bids on various Bid Packages for Bid Group #3 for NW Classen High School Addition project, located at 2801 NW 27th Street, Oklahoma City, OK 73107. Bids will be received at Lippert Bros., Inc.'s offices located at 2211 E. I-44 Service Road, Oklahoma City, OK 73111 no later than May 22, 2025 at 2:00 p.m. Bids will be opened and read out loud.

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2500 NE 30th Street
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Architect
JHBR Architecture
600 NE 4th Street, Suite 200
Oklahoma City, OK 73104
Construction Manager:
Lippert Bros., Inc.
Physical: 2211 E. I-44 Service Road, Oklahoma City, OK 73111
Mailing: PO Box 17450, Oklahoma City, OK 73136-1450
Phone : 405-478-3580, Fax : 405-478-3301
Shane VanOosten
svanoosten@lippertbros.com
Project Description :
Bid Group #3 consists of the Bid Packages Contained in this Advertisement for Bid Group No. 03
07.3 Metal Plate Wall Panels
09.3 Painting and Wall Coverings - Re-bid
11.0 Food Service
12.1 Furniture, Fixtures and Equipment
Availability of Bidding Documents:
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Notes: Bids over $50,000 will be required to include payment and performance bond bonds in their bid amount. Additional bid packages may be issued later as required. Women-owned and minority business enterprises are encouraged to participate in this project. A 5% Bid Bond or Certified or cashier's check is required for bids more than $50,000.00. The Owner has the right to reject any or all bids.
(5-1, 5-8-25)

(MS4052962)

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The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.
(5-1, 5-8-25)

(MS4053082)
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Project Name: Edmond Santa Fe Freshman Academy (Site Packages Only)
Bid Package 1-Site Demo
Bid Package 2-Utilities
Bid Package 3-Partial Site Concrete
Project Location: 1901 W. 15th St. Edmond, Ok 73013
Cost Estimate: $1,500,000.00
Bid Documents Available: Electronic Files or Hard Copies
Fee for Bid Documents: Electronic Files (Free) Hard Copies ($600.00)
Bid Opening Date: Wednesday, May 28th, 2025
Bid Opening Time: 1:00 P.M.
Contact Person (s): Jon Dowell
Dowell Pontikos Construction
Construction Manager for Edmond Public Schools
Phone: 405-735-7385
Email: Jon@dowellpontikos.com
Bid Bond:
If a bid exceeds $50,000, a cashier's check, a certified check or surety bid bond in the amount of five percent (5%) of the total bid shall accompany the sealed bid of each bidder, designating the Edmond Public Schools and Dowell-Pontikos Construction as dual obligees. Security checks will be returned to all but the three lowest bidders after the bid opening. The three lowest bid securities will be retained as provided in the Instructions to Bidders.
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(5-1, 5-8-25)

Sheriff's Sale

(SS4055166)
FIRST ALIAS NOTICE OF SHERIFF'S SALE
Case No. CJ-2024-5510
Judge Don Andrews

JPMORGAN CHASE BANK, NATIONAL ASSOCIATION, Plaintiff, v. TERRY B FISHER, DECEASED; KRISTI L. FISHER; SPOUSE, IF ANY, OF KRISTI L. FISHER; JOHN DOE, OCCUPANT; AND UNITED STATES OF AMERICA EX REL. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT Defendant(s).

NOTICE IS GIVEN to Terry B Fisher, Deceased; Kristi L. Fisher; Spouse, if any, of Kristi L. Fisher; John Doe, Occupant; United States of America ex rel. Department of Housing and Urban Development, and their unknown successors and assigns, that on June 17, 2025, at 10:00 am., 4205 North Lincoln Blvd, the Sheriff of said County will offer for sale and sell for cash at public auction to the highest and best bidder, with appraisement, all that certain real estate in Oklahoma County, Oklahoma, to wit:

LOT ELEVEN (11) IN BLOCK FOUR (4) IN LEAVITT'S NORTH PARK ADDITION NO. 2, TO EDMOND, OKLAHOMA COUNTY, OKLAHOMA, ACCORDING TO THE RECORDED PLAT THEREOF.

PROPERTY ADDRESS: 4210 Jordan Avenue, Edmond, OK 73013

subject to taxes and tax sales, said property being duly appraised at $125,000.00.

Sale will be made pursuant to an Order of Sale issued upon a judgment entered in the District Court of Oklahoma County, Oklahoma, in Case No. CJ-2024-5510, wherein JPMorgan Chase Bank, National Association is Plaintiff and Terry B. Fisher is/are Defendant(s) to satisfy said judgment in the sum of $114,274.84 together with interest at 6.625% per annum from January 1, 2024, and a deferred principal balance of $25,843.15, until paid, attorney's fee in the amount of $3,000.00, abstracting cost of $975.00, late charges, all advances for taxes, insurance premiums, property preservation expenses, and other fees or expenses incurred prior to or during the pendency of this action, and costs of this action.

WITNESS MY HAND this 30th day of April, 2025.

Tommy Johnson, III
Sheriff of Oklahoma County Oklahoma
LOGS LEGAL GROUP LLP
770 NE 63rd St.
Oklahoma City, OK 73105-6431
(405) 848-1819
Attorneys for Plaintiff
File No. 24-140871
(5-8, 5-15-25)

(SS4055196)
NOTICE OF SHERIFF'S SALE
Case No. CJ-2024-5421
Judge Sheila Stinson

U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION, AS TRUSTEE, AS SUCCESSORIN-INTEREST TO U.S. BANK NATIONAL ASSOCIATION, AS TRUSTEE FOR MASTR ASSET BACKED SECURITIES TRUST 2006- HE3, MORTGAGE PASS-THROUGH CERTIFICATES, SERIES 2006-HE3, Plaintiff, v. DENNIS WEST; SPOUSE, IF ANY, OF DENNIS WEST; JOHN DOE A/K/A STEPHANIE HEDRICK, OCCUPANT; AND VAK CAPITAL TRUST I Defendant(s).

NOTICE IS GIVEN to Dennis West; Spouse, if any, of Dennis West; John Doe, Occupant; VAK Capital Trust I, and their unknown successors and assigns, that on **June 17, 2025, 10:00AM**, 4205 N. Lincoln Blvd Oklahoma City, OK 73105 - North Entrance, the Sheriff of said County will offer for sale and sell for cash at public auction to the highest and best bidder, with appraisement, all that certain real estate in Oklahoma County, Oklahoma, to wit:

LOT FOUR (4), BLOCK THIRTY-ONE (31), BLOCKS THIRTY (30) TO THIRTY-EIGHT (38) INCLUSIVE, TO WARR ACRES, OKLAHOMA COUNTY, OKLAHOMA, ACCORDING TO THE RECORDED PLAT THEREOF.

PROPERTY ADDRESS: 6221 Reeves Court, Oklahoma City, OK 73122

subject to taxes and tax sales, said property being duly appraised at $75,000.00.

Sale will be made pursuant to an Order of Sale issued upon a judgment entered in the District Court of Oklahoma County, Oklahoma, in Case No. CJ-2024-5421, wherein U.S. Bank Trust Company, National Association, as trustee, as successor-in-interest to U.S. Bank National Association, as Trustee for MASTR Asset Backed Securities Trust 2006-HE3, Mortgage Pass-Through Certificates, Series 2006-HE3 is Plaintiff and Dennis West is/are Defendant(s) to satisfy said judgment in the sum of $63,799.34 together with interest at 2.4241% per annum or at the current adjustable rate from February 1, 2024, and a deferred principal balance of $5,061.08, until paid, attorney's fee in the amount of $3,000.00, abstracting cost of $975.00, late charges, all advances for taxes, insurance premiums, property preservation expenses, and other fees or expenses incurred prior to or during the pendency of this action, and costs of this action.

WITNESS MY HAND this 22nd day of April, 2025.

Tommy Johnson, III
Sheriff of Oklahoma County Oklahoma
LOGS LEGAL GROUP LLP
770 NE 63rd St.
Oklahoma City, OK 73105-6431
(405) 848-1819
Attorneys for Plaintiff
File No. 24-140799
(5-8, 5-15-25)

(SS4055199)
NOTICE OF SHERIFF'S SALE
Case No. CJ-2023-5623
Judge Don Andrews

NATIONSTAR MORTGAGE LLC, Plaintiff, v. STEPHANIE SHANAE GREENHOWARD A/K/A STEPHANIE GREENHOWARD; JAMES BUNYAN GREENHOWARD, IV A/K/A JAMES GREENHOWARD A/K/A JAMES GREENHOWARD IV A/K/A JAMES BUNYAN GREENHOWARD; JOHN DOE, OCCUPANT; AND STATE OF OKLAHOMA EX REL. OKLAHOMA TAX COMMISSION Defendant(s).

NOTICE IS GIVEN to Stephanie Shanae Greenhoward; James Bunyan Greenhoward, IV; John Doe, occupant; State of Oklahoma ex rel. Oklahoma Tax Commission, and their unknown successors and assigns, that on **June 17, 2025, 10:00AM**, 4205 N. Lincoln Blvd Oklahoma City, Ok 73150 - North Entrance, the Sheriff of said County will offer for sale and sell for cash at public auction to the highest and best bidder, with appraisement, all that certain real estate in Oklahoma County, Oklahoma, to wit:

LOT NINE (9), BLOCK ONE (1), WOODSIDE, AN ADDITION TO MIDWEST CITY, OKLAHOMA COUNTY, OKLAHOMA, ACCORDING TO THE RECORDED PLAT THEREOF.

PROPERTY ADDRESS: 3200 Del Rey Drive, Midwest City, OK 73110

subject to taxes and tax sales, said property being duly appraised at $210,000.00.

Sale will be made pursuant to an Order of Sale issued upon a judgment entered in the District Court of Oklahoma County, Oklahoma, in Case No. CJ-2023-5623, wherein Nationstar Mortgage LLC is Plaintiff and Stephanie Shanae Greenhoward and James Bunyan Greenhoward IV is/are Defendant(s) to satisfy said judgment in the sum of $154,607.96 together with interest at 5.625% per annum from November 1, 2022, until paid, attorney's fee in the amount of $2,700.00, abstracting cost of $875.00, late charges, all advances for taxes, insurance premiums, property preservation expenses, and other fees or expenses incurred prior to or during the pendency of this action, and costs of this action.

WITNESS MY HAND this 22nd day of April, 2025.

Tommy Johnson, III
Sheriff of Oklahoma County Oklahoma
LOGS LEGAL GROUP LLP
770 NE 63rd St.
Oklahoma City, OK 73105-6431
(405) 848-1819
Attorneys for Plaintiff
File No. 23-139851
(5-8, 5-15-25)

Hearings and Minutes

(CD4054958)
NOTICE OF HEARING
CASE CD 2025-001499

BEFORE THE CORPORATION COMMISSION OF THE STATE OF OKLAHOMA

APPLICANT: SURGE ENERGY TECHNOLOGIES, LC RELIEF SOUGHT: VERTICAL DRILLING AND SPACING UNITS LEGAL DESCRIPTION: E/2 SE/4 NE/4 AND E/2 NE/4 SE/4 OF SECTION 8 AND W/2 OF SECTION 9, TOWNSHIP 3 NORTH, RANGE 1 EAST, GARVIN COUNTY, OKLAHOMA

NOTICE IS HEREBY GIVEN that Applicant requests that the Commission enter an order:

(a) vacating Order No. 105748, insofar as said order established 160-acre drilling and spacing units for the production of gas and gas condensate from the McLish and Oil Creek common sources of supply underlying the NW/4 of said Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma;

(b) vacating Order No. 127830, insofar as said order established 40-acre drilling and spacing units for the production of oil and gas from the Pennsylvanian Sands and the Bromide Sands of supply underlying the E/2 SW/4 of said Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma;

(c) establishing 160-acre drilling and spacing units for the production of gas and gas condensate from the Permian, Cisco, Hoxbar, Bromide, McLish, Oil Creek and Arbuckle common sources of supply underlying the E/2 SE/4 NE/4 and E/2 NE/4 SE/4 of Section 8, Township 3 North, Range 1 East, Garvin County, Oklahoma, and the SW/4 NW/4, W/2 SE/4 NW/4, NW/4 SW/4 and W/2 NE/4 SW/4 of Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma. Applicant further requests that the order to be entered in this cause be made effective on some date prior to the date of the hearing; and

(d) establishing 100-acre drilling and spacing units for the production of gas and gas condensate from the Permian, Cisco, Hoxbar, Bromide, McLish, Oil Creek and Arbuckle common sources of supply underlying the N/2 NW/4 and E/2 SE/4 NW/4 and the S/2 SW/4 and E/2 NE/4 SW/4 of Section 9, Township 3 North, Range 1 East, Garvin County, Oklahoma. Applicant further requests that the order to be entered in this cause be made effective on some date prior to the date of the hearing.

License Applications

(MS4055191)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Bricktown Catering LLC 429 Kings of Leon Lane OKC, OK 73104 a/an limited liability company hereby publishes notice of its intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Caterer/Storage License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Caterer/Storage establishment with business premises located at 425 Kings of Leon Lane, Ste A in Oklahoma City, Oklahoma County, Oklahoma, under the business name of Bricktown Catering
Dated this 6th day of May, 2025.
Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Brent Brewer
County of Oklahoma, State of Oklahoma.
Before me, the undersigned notary public, personally appeared: Brent Brewer to me known to be the person(s) described in and who executed the foregoing application and acknowledged that he executed the same as his free act and deed.
Randy Malone
(Seal) Notary Public
My commission expires June 3, 2028, #08005424
(8-5, 8-15-25)

(MS4055204)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Diamond Ring 2020 LLC DBA Phaka Thai & Japanese Cuisine a/an Diamond Ring 2020 LLC hereby publishes notice of Her intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Beer & Wine License under authority of and in compliance with the said Act: That She intend(s), if granted such license to operate as a Beer & Wine establishment with business premises located at 1012 NW 150th Street in Edmond, Oklahoma County, Oklahoma, under the business name of Phaka Thai & Japanese Cuisine
Dated this 6th day of May, 2025.
Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Suthathip
County of Oklahoma, State of Oklahoma.
Before me, the undersigned notary public, personally appeared: Suthathip to me known to be the person(s) described in and who executed the foregoing application and acknowledged that they executed the same as their free act and deed.
MaRanda Beeson
(Seal) Notary Public
My commission expires February 18, 2026, #10001243
(5-8, 5-15-25)

(MS4053092)
NOTICE OF INTENTION TO APPLY FOR AN ALCOHOLIC BEVERAGE LICENSE

In accordance with Title 37, Section 522 and Title 37A, Section 2-141 Feast, LLC dba Feast,The World's Buffet Tejal Patel 6512 NW Expressway Oklahoma City OK 73132 a Limited Liability Company hereby publishes notice of it intention to apply within sixty days from this date to the Oklahoma Alcoholic Beverage Laws Enforcement Commission for a Mixed Beverage License under authority of and in compliance with the said Act: That it intend(s), if granted such license to operate as a Mixed Beverage establishment with business premises located at 6512 NW Expressway Oklahoma City OK 73132 in Oklahoma City, Oklahoma County, Oklahoma, under the business name of Feast, LLC dba Feast The World's Buffet
Dated this 28th day of April, 2025.
Signature of applicant(s): if partnership, all partners must sign. If corporation, an officer of the corporation must sign. If limited liability company, a manager must sign. If tribe, a tribal member must sign. Tejal Patel
County of Oklahoma, State of Oklahoma.
Before me, the undersigned notary public, personally appeared: Tejal Patel to me known to be the person(s) described in and who executed the foregoing application and acknowledged that She executed the same as Her free act and deed.
Sadia K. Cheema
(Seal) Notary Public
My commission expires September 25, 2026, #22012975
(5-1, 5-8-25)

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477 • tips@tips-usa.com

April 22, 2025

Springfield News-Leader

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.
Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com brooke.scott@tips-usa.com
903-575-2608

LocaliQ
Missouri
GANNETT

PO Box 631339 Cincinnati, OH 45263-1339

AFFIDAVIT OF PUBLICATION

Brooke Scott
Purchasing Cooperative Region 8 Education Service Center
4845 Us Highway 271 N
Pittsburg TX 75686-4303

STATE OF WISCONSIN, COUNTY OF BROWN

I do upon my oath state that I am the Legal Clerk of the Springfield News-Leader/Guidon, and that I am duly authorized to and do make this affidavit for and on behalf of the News-Leader, a newspaper published daily in the City of Springfield, Greene County, Missouri; that the public advertisement, notice or order of Publication, a true copy of which is hereto attached, was published in said newspaper in the issues dated:

05/01/2025, 05/08/2025

Sworn to and subscribed before on 05/08/2025

Legal Clerk

Notary, State of WI, County of Brown

3.7.27

My commission expires

Publication Cost:	$131.40	
Tax Amount:	$0.00	
Payment Cost:	$131.40	
Order No:	11249460	# of Copies:
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THIS IS NOT AN INVOICE!

Please do not use this form for payment remittance.

KAITLYN FELTY
Notary Public
State of Wisconsin

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
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The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

Classifieds

To Advertise, visit our website: **classifieds.news-leader.com**
- Public Notices/Legals email: **snl-legals@news-leader.com**
- Business & Services email: **servicedirectory@news-leader.com**
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Visit Our Website:
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All classified ads are subject to the applicable rate card, copies of which are available from our Advertising Dept. All ads are subject to approval before publication. Springfield News-Leader reserves the right to edit, refuse, reject, classify or cancel any ad at any time. Errors must be reported in the first day of publication. Springfield News-Leader shall not be liable for any loss or expense that results from an error in or omission of an advertisement. No refunds for early cancellation of order.

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shih tzu AKC registered champion bred shih tzu male puppies gold and white 3 months old $2500 or best offer halfwaytoheavenshihtzu.com Pat 417 467 2166 or 417 327 9570

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We are still putting songs in lots of peoples hearts
At this time, we have premium Havanese puppies for you.
Registered, Non-shedding
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Professional Service all your needs...

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Tree & Stump Removal, Shaping, Trimming, Shrubs
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Automotive Wheels best deal for you...

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Cadillac DeVille 1995 V-8,Sedan 130,000 miles,one owner,garage kepted, Amethyst color with Ivory vinyl top, ivory leather seats, power windows and seats, climate control ac. asking $14,500. 417-993-2188

Your Source Public Notices for the latest...

Bids & Proposals

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
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The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

SELL IT BUY IT FIND IT
Place your classified ad today.

Govt Bids & Proposals

NOTICE TO CONTRACTORS

OWNER: The Board of Governors for the Missouri State University

Submitted bids for the FY25 PARKING LOT MAINTENANCE, SPRINGFIELD CAMPUS must be received electronically through our e-bidding service provider, DemandStar at https://www.demandstar.com/app/agencies/missouri/missouri-state-university/procurement-opportunities/f6e6a3d7-625e-4022-8b68-c47f650addc0/, by 2:00 p.m. on May 13, 2025. Submitted bids will then be publicly opened and read aloud. With each proposal, a certified check or bid bond properly executed by the bidder in the amount of five percent (5%) of the bid shall be submitted.

Further information on plans, specifications, and our e-bidding service provider, DemandStar can be obtained at https://plans.missouristate.edu/.

Attention of bidders is particularly called to the requirements as to the conditions of employment to be observed. Bidders must agree to comply with the prevailing wage rate provisions and other statutory regulations as referred to in the specifications.
MSU is an AA/EO institution.

Public Notices

Compensation Study
The LIBRARY
Springfield-Greene County Library District

The Springfield-Greene County Library District (The Library) is seeking a qualified compensation analysis consultant to conduct a comprehensive review of our current compensation structure, including salary levels, job grading, and market competitiveness, to ensure internal equity and attract and retain top talent. The deadline for receiving the proposal shall be Friday, May 16, 2025. Direct all questions concerning the RFP to: Human Resource Director, Lori Ruzicka at 417-616-0561 or humanresources@thelibrary.org.
April 28, 29, 30, May 1, 2 2025
LCLM0285084

Find your new job HERE!

Bids & Proposals

Crossland Construction Company is accepting bids for Dadeville Schools, located at 17 Bearcat Trail Dadeville, MO, 65635. A complete scope of work and bid package/bid form can be obtained through the contacts listed below. Potential subcontractors must meet Crossland's qualification requirements (insurance, safety policies, bonding, etc). If you are interested in bidding on this project, please contact Ernie Perkins or Jeff Groven at bid@crossland.com. Main office phone is 417-368-3957.

Having A Garage Sale?

Let your community know by advertising in your local newspaper.

Don't wait, call today!



The World's Lightest Wheelchair

For those of us who've found daily activities becoming more challenging, there's a remarkable breakthrough in mobility that's changing lives. This ultra-lightweight wheelchair is nothing like the bulky and heavy models of yesterday weighing over 35lbs! - imagine gliding effortlessly through your garden again, joining your family at the park, or meeting friends for coffee, all without worry of fatigue or dependency. Why not take that first step toward renewed freedom? Your next chapter of independence is here.



Throughout the ages, there have been significant advancements in mobility aids. From canes to walkers, rollators, and scooters, these devices were created to help those with mobility issues maintain their independence. However, there haven't been any truly revolutionary new products in this field until now. Until now, that is, because a team of engineers has developed something that's set to change the game. They've created the world's lightest wheelchair, weighing only 13.5 lbs, a personal mobility solution that's been called a game-changer. It's called the **Featherweight Wheelchair**, and there is nothing out there quite like it.

The first thing you'll notice about the **Featherweight Wheelchair** is how light it is! This is the world's lightest wheelchair at 13.5lbs, making it possible for anyone to lift into a vehicle. It's modern design and custom color options make it very lightweight, durable, and great to look at.



Why take our word for it? Call now, and **receive $50 Off** when you purchase a **Matte Black Featherweight Wheelchair! Only $599!** Mention CODE 50FEATHER to start your journey towards effortless mobility.

Jennifer F. us
Verified Buyer
01/09/25

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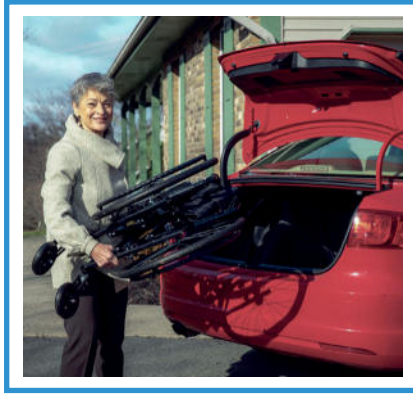
It's so light weight that it's no problem to lift in and out of the back of my car. It's also easy to set up and collapse down. It is very compact and the wheels come off for compact packing alongside luggage or groceries etc. My Mom finds it very comfortable to ride in as well and enjoys the look. We both love it.



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all your favorites...

Domestic Pets

shih tzu AKC registered champion bred shih tzu male puppies gold and white 3 months old $2500 or best offer halfwaytoheavenshihtzu.com Pat 417 467 2166 or 417 327 9570

Morning Song Kennels
We are still putting songs in lots of peoples hearts
At this time, we have premium Havanese puppies for you.
Registered, Non-shedding
Vet Checked & Socialized.
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La-Z-Boy Luxury Power Lifted, Lays Back,Recliner Chair, Like New. asking $1250.00 . 417-993-2188

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Tree & Stump Removal, Shaping, Trimming, Shrubs
Licensed & Insured
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Homes for Sale

FOR SALE Tiny home on 8x20 2 axle trailer. Walnut cabinets. $22,000. Call 816-927-5155.

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new beginnings...

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PUBLISHER'S NOTICE
All real estate advertised herein is subject to the Federal Fair Housing Act, which makes it illegal to advertise any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin, or intention to make any such preference, limitation, or discrimination. "We will not knowingly accept any advertising for real estate which is in violation of the law. All persons are hereby informed that all dwellings advertised are available on an equal opportunity basis.

EQUAL HOUSING OPPORTUNITY

Single Family Rentals

Nearby Mt. Vernon Square
Nice 2 Bedroom
Full Basement
12 Month Lease
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Automotive Wheels
best deal for you...

Cars

Cadillac DeVille 1995 V-8,Sedan 130,000 miles,one owner,garage kepted, Amethyst color with Ivory vinyl top, ivory leather seats, power windows and seats, climate control ac. asking $14,500. 417-993-2188

Your Source Public Notices
for the latest...

Bids & Proposals

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Bids & Proposals

Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on June 20, 2025, at 3:00 pm local time. Call 866-839-8477 for problems with website or questions.

Notice To Creditors

Notice to Creditors
All persons interested in the estate of Harry McDaniel, decedent. The undersigned Janet A Davis is acting as trustee under a trust, the terms of which provide that the debts of the decedent may be paid by the trustee upon receipt of proper proof thereof. The address of the trustee is 1522 S. Briar Ave Springfield MO 65809. All creditors of the decedent are noticed to present their claims to the undersigned within six (6) months from the date of 1st publication or be forever barred. Janet A Davis
May 8, 15, 22, 29 2025
LCLM0291725

Bids & Proposals

Crossland Construction Company is accepting bids for Dadeville Schools, located at 17 Bearcat Trail Dadeville, MO, 65635. A complete scope of work and bid package/bid form can be obtained through the contacts listed below. Potential subcontractors must meet Crossland's qualification requirements (insurance, safety policies, bonding, etc). If you are interested in bidding on this project, please contact Ernie Perkins or Jeff Groven at bid@crossland.com. Main office phone is 417-368-3957.

Govt Bids & Proposals

Notice of Public Hearing:

A public hearing with planning and zoning will be held on Tuesday, June10th, at 6:00 pm at Rogersville City Hall. This hearing will be held to discuss:

A Planned Community development along S Farm Rd 249.

Any interested citizens are encouraged to attend the hearing. For more information, please contact City Administrator, Chad Bybee at 417-753-2884 x 313.

Public Notices

Downtown Springfield Community Improvement District
Annual Meeting Notice

May 14, 2025, Wednesday
8:00 am
Councilman Denny Whayne Conference Room
Busch Building 4th Floor
840 Boonville
Springfield, MO 65802

2025-2026 Budget, Committee updates on past and future projects.
For Information contact:
Nicole Brown,
Secretary/Treasurer
Downtown Springfield Community Improvement District,
650 N. Boonville Ste. 100,
Springfield, MO 65806 or
417-812-6101

Bids for M.S.H.P. Troop E Headquarters-Renovate Exterior, Headquarters Building, Project No. R2335-01 will be received by FMDC, State of MO, UNTIL 1:30 PM, June 10, 2025. Project information available at:
http://oa.mo.gov/facilities

Bids & Proposals

Govt Bids & Proposals

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cars
yard sales
tickets
antiques
motorcycles
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Place your classified ad today.

CAD Drafter & Modeler

Full-time permanent manufacturing position. Any experience 1 to 2 years with AutoCAD, Vault, Inventor 3D and certificate preferred. Southern Mo location, not in Springfield. Report to Engineering Manager.

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EOE

SL-41776259

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For those of us who've found daily activities becoming more challenging, there's a remarkable breakthrough in mobility that's changing lives. This ultra-lightweight wheelchair is nothing like the bulky and heavy models of yesterday weighing over 35lbs! - imagine gliding effortlessly through your garden again, joining your family at the park, or meeting friends for coffee, all without worry of fatigue or dependency. Why not take that first step toward renewed freedom? Your next chapter of independence is here.



Throughout the ages, there have been significant advancements in mobility aids. From canes to walkers, rollators, and scooters, these devices were created to help those with mobility issues maintain their independence. However, there haven't been any truly revolutionary new products in this field until now. Until now, that is, because a team of engineers has developed something that's set to change the game. They've created the world's lightest wheelchair, weighing only 13.5 lbs, a personal mobility solution that's been called a game-changer. It's called the **Featherweight Wheelchair**, and there is nothing out there quite like it.

The first thing you'll notice about the **Featherweight Wheelchair** is how light it is! This is the world's lightest wheelchair at 13.5lbs, making it possible for anyone to lift into a vehicle. It's modern design and custom color options make it very lightweight, durable, and great to look at.



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April 22, 2025

Kim Ridgeway
Russell Johns Associates LLC

Please print the following **LEGAL NOTICE: Thursday, May 1, 2025, AND Thursday, May 8, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

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250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

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May 8, 2025

Affidavit of Publication

To Whom It May Concern:
I am a duly authorized representative of MCA Russell Johns Associates LLC, the company handling the advertising matters for USA Today a daily newspaper distributed within the United States.

A public notice ad was placed by Region 8 Education Service Center (TIPS) (RFP No. 250501 250502 250503 250504) and was published in said newspaper within the marketplace section of the National USA Today Marketplace on May 1, 2025 and May 8, 2025.

Anthony Pacini

On this 8th day of May, I attest that the attached document is a true, exact, complete, and unaltered tearsheet.

Notary

ELISABETH KIDWELL
Notary Public - State of Florida
Commission # HH 517131
My Comm. Expires Apr 17, 2028
Bonded through National Notary Assn.

NFL POWER RANKINGS

Where do all 32 teams stand with draft complete?

Nate Davis
USA TODAY



Among the prominent players to watch in 2025 will be, from left, Patrick Mahomes, Travis Hunter and Aaron Rodgers.
ILLUSTRATION BY SPENCER HOLLADAY; PHOTOS BY IMAGN IMAGES AND GETTY IMAGES

NFL power rankings with the 2025 draft now complete (previous rank in parentheses):

1. Philadelphia Eagles (1): Even coming off a dominant Super Bowl triumph over an active dynasty, it very much feels like this team is positioned to achieve even more – which may be especially true given executive vice president/general manager Howie Roseman somehow winds up with a player like LB Jihaad Campbell joining the roster at the end of the draft's first round. Rich and richer, etc., etc.

2. Baltimore Ravens (3): Perhaps you don't love the choice of second-round OLB Mike Green philosophically – which is especially puzzling for an organization that now appears appropriately poised to part with K Justin Tucker after drafting a new one. Yet it's also hard to deny that a team that's gone 25-9 over the past two regular seasons seems to be picking up steam, especially given QB Lamar Jackson's amazing knack for continuous improvement.

3. Los Angeles Rams (4): Once and future kings? Three years removed from winning the Super Bowl, the new-look Rams were the only team to challenge Philly in the playoffs. Now they've swapped out WR Cooper Kupp for Davante Adams, added more fresh talent to the defense, and are set up to replace QB Matthew Stafford (if need be) with multiple first-round selections in 2026.

4. Kansas City Chiefs (5): Speaking of that aforementioned dynasty, if ever a perennial contender coming off a 17-3 season, its ninth straight division title and fifth Super Bowl berth in six seasons felt vulnerable ... well, maybe that notion has actually already passed? Whenever he's physically ready, first-round LT Josh Simmons seems capable of stabilizing QB Patrick Mahomes' blind side for a very long time. Mahomes' comfort level should be further improved by the return of WR Rashee Rice, even if he has to serve a suspension, from injury. The road to the AFC crown still very much runs through Arrowhead.

5. Buffalo Bills (2): This slightly subdued ranking is less a suggestion that they're dropping but more an acknowledgment that the other closely packed Super Bowl aspirants have improved more significantly – not to mention the likelihood that the AFC East probably won't be the cakewalk it's been in recent years. But we don't mind you passing on wide receivers in the draft, Brandon Beane.

6. Washington Commanders (6): A team that did a notably poor job of drafting prior to the arrival of GM Adam Peters and HC Dan Quinn in 2024 now seems to be steadily building a strong foundation, yet shouldn't need to be overly reliant on its latest crop of rookies in 2025.

7. Detroit Lions (7): Hard to argue with any draft that strongly resources the trenches. The biggest question in Motown remains how well the two-time defending NFC North champs transition to two new coordinators.

8. Green Bay Packers (8): As good as they were in 2024, the sum of the parts seemed greater than the whole in what was something of a mirrored outcome compared to the 2023 team. But the newest part, first-round WR Matthew Golden, and the apparent retention of another, Pro Bowl CB Jaire Alexander, could be signs that the "Go Pack Go" you heard throughout draft weekend could continue deep into the upcoming season.

9. Tampa Bay Buccaneers (9): They're quite obviously capable of running the NFC South for the foreseeable future. But do they have the juice to consistently make deep playoff runs, especially after picking another receiver (Emeka Egbuka) in the first round when difference-makers for the defensive front seven seemed readily available?

10. Houston Texans (18): Sure seems as if they'll need to mount an exceptional effort ... to *not* win the AFC South in 2025. That might explain some of their willingness to make so many fundamental changes to the offense, modifications surely aimed at much bigger objectives than obtaining another divisional crown.

11. Los Angeles Chargers (10): The 49ers reached the Super Bowl in their second season under Jim Harbaugh (of course, they also qualified for the conference championship round in their first). For the Bolts to match those 2013 Niners in Year 2, they'll need to leverage the advantage of their hefty continuity while hoping Harbs can help the roster's young core truly blossom.

12. Cincinnati Bengals (13): Their draft wasn't especially inspiring. But this club's primary obstacles still seem to be issues that must be solved from within – giving DE Trey Hendrickson the raise he deserves and avoiding another disastrous September start, problems that threaten to become disastrously intertwined.

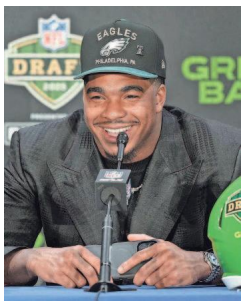
13. Denver Broncos (17): It's easy (and justifiable) to link their quick turnaround to HC Sean Payton and QB Bo Nix. It also seems a bit easy to lose sight of what an elite defense this could be, especially with the arrival of first-round DB Jahdae Barron.

14. San Francisco 49ers (11): We're eight seasons into the John Lynch-Kyle Shanahan regime – half ending outside the playoffs, the other half extending at least as far as the NFC title game. Despite a significant offseason recalibration, the Niners seem too good to miss the postseason again ... assuming they don't get swamped by another litany of injuries.

15. Seattle Seahawks (12): Speaking of recalibrating, they could have five new starters on offense, most notably QB Sam Darnold and Kupp. If first-year coordinator Klint Kubiak can balance the unit – meaning sustained emphasis on the run, which is what HC Mike Macdonald wants – feasible chance they don't wind up a tiebreaker shy of the playoffs again.

16. Pittsburgh Steelers (26): Despite an ongoing offseason of uncertainty, no one should suggest switching out Russell Wilson for Aaron Rodgers – assuming he ever signs a contract – is a lateral move at quarterback. Forward lateral? Maybe. But if the Steelers truly hope to punctuate another 9-8 season with a long-awaited postseason win, the most important components could be third-round RB Kaleb Johnson and a young offensive line that needs to fully coalesce.

17. Arizona Cardinals (15): A team that (quietly?) doubled its win total from four to eight in 2024 has basically left an 11th-ranked offense untouched while overhauling a 21st-ranked defense. What it means is TBD, though it would be easier to back the Cards as a dangerous 2025 dark horse if they weren't stuck in a division that's probably the league's roughest top to bottom.



Jihaad Campbell is the latest Georgia Bulldog drafted by the Super Bowl champion Eagles. KIRBY LEE/IMAGN IMAGES

18. Minnesota Vikings (14): Admittedly, they were devalued at this time a year ago – basically universally – given the unknown at quarterback. And while the totality of talent on the roster (and coaching staff) might be in sharper focus now, the unknown at quarterback remains.

19. Chicago Bears (16): Did you know they haven't won a playoff game in 14 years? Perhaps the organizational penchant for disarray quells what looks like a very good team on paper – for the second year in a row. But let's give highly recommended rookie HC Ben Johnson and his new staff a year to settle in before they're forced to prove these aren't the same old Bears.

20. New England Patriots (19): Whereas Johnson is an unproven commodity as a head coach, Mike Vrabel most certainly is not. Aside from his return to the sideline, the Pats' 22 starters in 2025 may look at least 50% different from last year's 4-13 edition. Don't be surprised if this is also a formula for the victory column to undergo a twofold upgrade.

21. Las Vegas Raiders (30): The marriage of an excellent draft headlined by RB Ashton Jeanty, a veteran infusion on defense, arrival of Geno Smith to settle the quarterback position and – perhaps most important – new head coach Pete Carroll's competitive culture should make the Silver and Black a far more competitive operation in 2025, if one that still has an uphill battle to escape last place in the AFC West.

22. Dallas Cowboys (20): Their draft was solidly promising – and Jerry Jones and Co. definitely seemed to follow the "best player available" axiom rather than drafting for need. That said, the Cowboys have more work to do on this roster heading into next season and could be a team especially focused on reeling in some of the more notable free agents who have taken their time picking new destinations.

23. Carolina Panthers (23): If QB Bryce Young can maintain his trend line from the second half of last season – eminently reasonable given his young weapons and HC Dave Canales – a defense that ranked dead last in 2024 may be the primary factor hindering this team from possibly contending within this division. However, getting DE Derrick Brown back from his knee injury could be a game changer ... literally.

24. Miami Dolphins (21): Gotta commend them for targeting big guys in the draft ... yet unclear if they targeted the optimal ones. The secondary still looms as a problematic issue, especially with the presumption CB Jalen Ramsey is on his way out of South Florida. It adds up to the daunting prospect of QB Tua Tagovailoa having to potentially drop back 40 times per game.

25. New York Jets (25): Clearly, the expectations in 2024 were too outsized (raises hand). Maybe the expectations in 2025 are too downsized (slowly raising hand?). But a largely measured approach to free agency and the draft signal an encouraging start for a new regime that seems fixated on keeping the main thing the main thing.

26. Jacksonville Jaguars (24): The arrival – at significant cost – of 2024 Heisman Trophy winner Travis Hunter could make them a curiosity they haven't been since joining the league 30 years ago. But rookie HC Liam Coen must do for QB Trevor Lawrence what he did for Baker Mayfield in Tampa if the Jags are to become legitimately relevant again.

27. Atlanta Falcons (22): Maybe they finally solved their years-long pass rush deficiencies. Maybe they paid way too exorbitantly to do it. Maybe this roster will just be hopelessly out of kilter as long as its backup quarterback is making nearly $30 million (or more) annually.

28. New York Giants (32): This draft will doubtless ultimately be defined by the success or failure of first-round QB Jaxson Dart. But it sure appears like a strong haul – even if the results aren't immediately apparent in the win column for the team with the league's toughest schedule (based on opponents' 2024 winning percentages) in 2025.

29. Cleveland Browns (27): Their surprising approach to the 2025 draft suggests they're far more focused on the 2026 draft – and consequently worth wondering how far Joe Flacco or Shedeur Sanders or Otto Graham could carry this offense as currently constructed.

30. Indianapolis Colts (28): The uncertainty at quarterback combined with the loss of two starting offensive linemen render this a worrisome situation. Should help on both fronts that first-round TE Tyler Warren landed in Indy's lap.

31. Tennessee Titans (31): History shows that a team drafting a quarterback No. 1 overall is going to struggle, though maybe it helps that Cam Ward won't be saddled with the same weighty expectations Caleb Williams carried last year in Chicago. Simply limiting the turnovers that so often put this defense in bad spots in 2024 would be a good start for Ward.

32. New Orleans Saints (29): The murky situation around Derek Carr's injured throwing shoulder significantly clouds the outlook of a team that will otherwise be at the mercy of a highly inexperienced group of quarterbacks ... even if second-rounder Tyler Shough, who's almost 26, just left college after seven years.

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The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

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Senators look into fans' streaming frustration

Chris Bumbaca
USA TODAY



Sen. Ted Cruz, R-Texas, is chairman of the Senate committee on Commerce, Science, and Transportation.
JACK GRUBER/USA TODAY NETWORK VIA IMAGN IMAGES

WASHINGTON – To watch live sports at home in 2025, between all of the apps and channels and streams that games air on thanks to billion-dollar rights deals, it can feel like being in a NASA control room.

Now Congress wants to be involved.

On May 6 on Capitol Hill, the Senate Commerce Committee – which has jurisdiction over the telecommunications that professional sports leagues use to broadcast games – interviewed representatives from the NBA, MLB and the NHL about sports' embrace of streaming, which creates a segmented market that is pricier for consumers.

"This is a growing problem," committee chairman Sen. Ted Cruz, R-Texas, said after the hearing. "Fans are understandably upset that it's really hard to watch your home team, figure out what app or what network, how to watch it. It's fractured right now. It's expensive right now."

Notably, the NFL did not attend the hearing despite Cruz's April 17 letter to Commissioner Roger Goodell requesting his or a league representative's presence. The NFL did not respond to a prior request from USA TODAY Sports for comment asking if the league intended to send a representative.

"I wish they had come," Cruz said. "I think the issues that were discussed apply to them just like they apply to the leagues that were here."

The main lines of questioning during the lightly attended meeting – nine of the 25 committee members showed up and most stayed for only brief periods – revolved around whether the leagues are not taking advantage of the antitrust legislation afforded to them through the Sports Broadcasting Act of 1961. The leagues said that because they can operate as one entity during media rights negotiations, they can pool resources to create a cheaper and more accessible model for fans.

John Bergmayer, the fourth witness and the legal director of the nonprofit group Public Knowledge, said fans feel like they finally broke free of the cable bundle only to watch it reform thanks to streaming platforms.

"Streaming is no longer an afterthought, and policymakers, content creators, tech platforms, and sports leagues need to take steps to ensure that shifts in the media, technology, and sports landscapes benefit viewers, and lead to cheaper and more convenient options," Bergmayer said during his opening statement.

The subject of local blackouts came up early, with MLB executive vice president of media and business development Kenny Gersh saying each club has the right to distribute on cable in its market and that 29 of the 30 clubs also have a direct-to-consumer (DTC) option for streamers. But the collapse of the Regional Sports Network (RSN) market has created an upheaval for leagues.

"As we continue to have flux in the system, we're going to have to continue to evaluate," NHL senior executive vice president of media and international strategy David Proper said.

Many of the Democratic senators, including ranking member Maria Cantwell, D-Washington, Ben Ray Lujan, D-New Mexico, and Ed Markey, D-Massachusetts, used their time to lambaste President Donald Trump's proposed cuts of National Public Radio and PBS.

Sen. Amy Klobuchar, D-Minnesota, explicitly asked NBA president of global content and media distribution Bill Koenig about the league's valuation of the WNBA in its media rights negotiations.

"We're mindful of the growing popularity of the WNBA," said Koenig, who added that the new media rights deals – valued at $76 billion – included upside provisions. For example, the revenue sharing that comes from advertising numbers stands to benefit the WNBA, he said.

Sen. Marsha Blackburn, R-Tennessee, used her five minutes to grill Koenig about the Daryl Morey "Hong Kong" freedom tweet from nearly six years ago and wanted to know what broadcast rights in China are worth. She also inquired about internet piracy and its impact on streaming.

Sen. Bernie Moreno, R-Ohio, encouraged the leagues to find solutions on their own rather than compelling Congress to be involved and regulate the leagues further, while Sen. Eric Schmitt, R-Missouri, relied on his experience of trying to stream St. Louis Cardinals games as an example of the plight fans go through to watch their teams.

"People do care about this a lot," Schmitt said.

Cantwell was interested in whether the leagues have specific data or metrics about fan complaints.

"It's certainly something we hear," Gersch said.

Cantwell floated a mandate for teams to make their games free in local markets backed by advertising revenue, a more traditional model. She doesn't want the simple act of watching a sporting event to be hijacked by a larger consumer experience like having to buy an annual subscription to a streaming service such as Prime Video or Peacock.

"There's just too much here where they can just think about the dollar instead of thinking about the true consumer experience," she said.

"In return for the very public benefits that teams and leagues receive," Bergmayer said, demonstrating the difference from other entertainment products, "there should be an obligation to make sure that games are widely accessible."

Cruz said the hearing was meant to be an informational, fact-finding exercise and he was pleased to that end.

A specific remedy, despite multiple legislative avenues, Cruz said, remains up in the air.

"It shouldn't be insanely complicated or insanely expensive to cheer on your hometown team," he said.

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The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time.** Call 866-839-8477 for problems with website or questions.

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Mobile and Self-Propelled Power Storage Equipment with Related Attachments to result in a procurement solution for use by its Participating Entities.

Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada.

A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal https://proportal.sourcewell-mn.gov

Only proposals submitted through the Sourcewell Procurement Portal will be considered.

Proposals are due no later than June 26, 2025, at 4:30 p.m. Central Time, and late proposals will not be considered.

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LEGAL NOTICES

IN THE UNITED STATES BANKRUPTCY COURT FOR THE DISTRICT OF DELAWARE

In re: DANIMER SCIENTIFIC, INC., *et al.*, Debtors.[1] | Chapter 11, Case No. 25 – 10518 (MFW) | (Jointly Administered)

NOTICE OF BAR DATES FOR FILING PROOFS OF CLAIM

TO ANY CREDITORS OF THE ABOVE-CAPTIONED ENTITIES (THE "*DEBTORS*"):

On May 5, 2025, the United States Bankruptcy Court for the District of Delaware (the "***Court***") entered an order (the "***Bar Date Order***") in the above-captioned chapter 11 cases (the "***Chapter 11 Cases***") establishing certain claims bar dates.[2]

THE BAR DATES. The Bar Date Order establishes the following bar dates for filing claims in these Chapter 11 Cases (collectively, the "***Bar Dates***"):

The General Bar Date. Pursuant to the Bar Date Order, except as described below, all entities holding claims, whether secured, unsecured priority (including Section 503(b)(9) Claims) or unsecured nonpriority, against the Debtors that arose prior to March 18, 2025 (the "***Petition Date***") must file proofs of claim by the General Bar Date (*i.e.*, by June 9, 2025 at 5:00 p.m., Eastern Time). With respect to Section 503(b)(9) Claims, the filing of a proof of claim shall be deemed to satisfy the procedural requirements for the assertion of such administrative claims.

The Governmental Bar Date. Pursuant to the Bar Date Order, except as described below, all governmental units holding claims against the Debtors (whether secured, unsecured priority or unsecured nonpriority) that arose before the Petition Date must file proofs of claim by the Governmental Bar Date (*i.e.*, by September 15, 2025 at 5:00 p.m., Eastern Time).

The Rejection Bar Date. Any entity whose claims arise out of the rejection of an executory contract or unexpired lease pursuant to a Court order (a "***Rejection Order***") or by operation of section 365(d)(4) of the Bankruptcy Code, including secured claims, unsecured priority claims and unsecured nonpriority claims that arose or are deemed to have arisen prior to the Petition Date, must file a proof of claim on or before the later of (a) the General Bar Date and (b) 5:00 p.m., Eastern Time, on the date that is 30 days after service of the Rejection Order.

The Amended Schedules Bar Date. If the Debtors amend or supplement their schedules of assets and liabilities (the "***Schedules***") to reduce the undisputed, non-contingent and liquidated amount of a claim against the Debtors, to change the nature or classification of a claim against the Debtors or to add a new claim to the Schedules, any affected entities that dispute such changes must file a proof of claim or amend any previously filed proof of claim in respect of the amended scheduled claim on or before the later of: (a) the General Bar Date; and (b) 5:00 p.m., Eastern Time, on the date that is 30 days after the date that notice of the applicable amendment to the Schedules is served on the entity.

FILING CLAIMS

1. **WHO MUST FILE.** Subject to the terms set forth in the Bar Date Order and described above for holders of claims subject to the Governmental Bar Date, Rejection Bar Date and the Amended Schedules Bar Date, the following entities must file proofs of claim on or before the General Bar Date:
(a) any entity (i) whose prepetition claim against the Debtors is not listed in the Debtors' Schedules or is listed as disputed, contingent or unliquidated and (ii) that desires to participate in these Chapter 11 Cases or share in any distributions in these Chapter 11 Cases; and
(b) any entity that believes that its prepetition claim is improperly classified in the Schedules or is listed in an incorrect amount and that desires to have its claim allowed in a classification or amount different from the classification or amount identified in the Schedules.

2. **WHAT TO FILE.** Parties asserting claims against the Debtors that arose before the Petition Date must use the copy of the proof of claim form (the "***Proof of Claim Form***") available on the Debtors' case website hosted by Stretto, Inc. ("***Stretto***") at https://cases.stretto.com/danimerscientific.

3. **WHEN AND WHERE TO FILE.** Entities must (i) deliver the Proof of Claim Form in person or by courier service, hand delivery or mail so it is received on or before the applicable Bar Date at the following address: Danimer Scientific, Inc., et al. Claims Processing, c/o Stretto, 410 Exchange, Suite 100, Irvine, CA 92602, or (ii) deliver it electronically using the interface available on Stretto's website at https://cases.stretto.com/danimerscientific on or before the applicable Bar Date.

Forms will be deemed filed when actually received by the Debtors' claims agent, Stretto. ***Forms may not be delivered via facsimile or electronic mail transmission.*** Any facsimile or electronic mail submissions will not be accepted and will not be deemed filed until a claim is submitted by one of the methods described above.

Forms will be collected, docketed and maintained by Stretto. If you want to receive acknowledgment of Stretto's receipt of a form, you must submit by the applicable Bar Dates and concurrently with submitting your original form (a) a copy of the original form and (b) a self-addressed, postage prepaid return envelope. Additionally, if you submit a Proof of Claim Form through Stretto's website interface, you will receive an email confirmation of your submission.

All forms must be signed by the claimant or, if the claimant is not an individual, by an authorized agent of the claimant. The form must be written in English, be denominated in United States currency and conform substantially with the Proof of Claim form. The Proof of Claim Form must set forth with specificity the legal and factual basis for the alleged claim. You must attach to your completed form any documents on which the claim is based (or, if such documents are voluminous, attach a summary) or an explanation as to why the documents are not available.

Any entity asserting claims against multiple Debtors must file a separate form with respect to each Debtor. In addition, any entity filing a claim must identify on its form the particular Debtor against which the entity asserts its claim. Any claim filed under the joint administration case, Danimer Scientific, Inc., Case No. 25-10518 (MFW), or that otherwise fails to identify a Debtor shall be deemed as filed only against Debtor Danimer Scientific, Inc.. If an entity lists more than one Debtor on any one form, the relevant claims shall be treated as filed only against the first listed Debtor.

CONSEQUENCES OF FAILURE TO FILE A CLAIM. Any entity that is required to file a Proof of Claim Form pursuant to the Bar Date Order, but fails to properly do so by the applicable Bar Date, shall not be treated as a creditor or claimant (as applicable) with respect to such claim for the purposes of voting and distribution in the above-captioned cases and shall be forever barred, estopped and enjoined from asserting any such claim against the Debtors or their estates or property.

ADDITIONAL INFORMATION. If you require additional information, you may contact Stretto (i) by telephone at (855) 469-1505 (toll-free) or 1-657-232-7988 (international), (ii) by email at teamdanimerscientific@stretto.com, or (iii) by submitting an inquiry on Stretto's website at https://cases.stretto.com/danimerscientific. Copies of the Bar Date Order and other information regarding the Debtors' Chapter 11 Cases are available for inspection free of charge on Stretto's website at https://cases.stretto.com/danimerscientific.

A HOLDER OF A POSSIBLE CLAIM AGAINST THE DEBTORS SHOULD CONSULT AN ATTORNEY REGARDING ANY MATTERS NOT COVERED BY THIS NOTICE, INCLUDING WHETHER THE HOLDER SHOULD FILE A PROOF OF CLAIM FORM.

The Debtors in these Chapter 11 Cases and the last four digits of their respective federal tax identification numbers are: Danimer Scientific, Inc. (4518); Danimer Bioplastics, Inc. (0734); Danimer Scientific Holdings, LLC (0521); Danimer Scientific Kentucky, Inc. (6771); Danimer Scientific Manufacturing, Inc. (0122); Danimer Scientific, L.L.C. (7346); Meredian Bioplastics, Inc. (5822); Meredian Holdings Group, Inc. (7239); Meredian, Inc. (7507); and Novomer, Inc. (4173). The location of the Debtors' corporate headquarters is: 140 Industrial Boulevard, Bainbridge, Georgia, 39817.

[2] Capitalized terms not otherwise defined herein shall have the meanings given to them in the Bar Date Order.

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This announcement is neither an offer to purchase nor a solicitation of an offer to sell Shares (as defined below). The Offer (as defined below) is made solely by the Offer to Purchase, dated May 5, 2025, and the related Letter of Transmittal, and any amendments thereto, and is being made to all holders of Shares. Purchaser (as defined below) is not aware of any state where the making of the Offer is prohibited by administrative or judicial action pursuant to any valid state statute. If Purchaser becomes aware of any valid state statute prohibiting the making of the Offer, Purchaser will make a good faith effort to comply with such statute. If, after such good faith effort, Purchaser cannot comply with such state statute, the Offer will not be made to nor will tenders be accepted from or on behalf of the holders of Shares in such state. In any jurisdiction where securities, blue sky or other laws require that the Offer be made by a licensed broker or dealer, the Offer shall be deemed to be made on behalf of Purchaser by one or more registered brokers or dealers licensed under the laws of such jurisdiction.

Notice of Offer to Purchase for Cash Up to 4,000,000 Shares of Common Stock of AT&T INC. at $26.38 Net Per Share by TRC CAPITAL INVESTMENT CORPORATION

TRC Capital Investment Corporation, a corporation under the laws of the Province of Ontario, Canada ("Purchaser"), is offering to purchase up to 4,000,000 shares of common stock, $1.00 par value per share (the "Shares"), of AT&T Inc., a Delaware corporation (the "Company"), at $26.38 per share, net to the seller in cash, upon the terms and subject to the conditions set forth in the Offer to Purchase, dated May 5, 2025, and in the related Letter of Transmittal (the "Offer"). The offer is not conditioned upon the tender of any minimum number of Shares.

THE OFFER, PRORATION PERIOD AND WITHDRAWAL RIGHTS WILL EXPIRE AT ONE MINUTE AFTER 11:59 P.M., NEW YORK CITY TIME, ON JUNE 3, 2025, UNLESS THE OFFER IS EXTENDED OR EARLIER TERMINATED.

Shares tendered pursuant to the Offer may be withdrawn at any time prior to one minute after 11:59 p.m., New York City time, on June 16, 2025, (the "Expiration Date") unless the Offer is extended, and, if not yet accepted for payment by the Purchaser, may also be withdrawn after June 16, 2025. If more than 4,000,000 Shares are validly tendered prior to the Expiration Date and not properly withdrawn, the Purchaser will, upon the terms and subject to the conditions of the Offer, accept for payment and pay for only 4,000,000 Shares on a pro rata basis, with adjustments to avoid purchases of fractional Shares. The information required to be disclosed pursuant to the Securities Exchange Act of 1934, as amended, is contained in the Offer to Purchase and is incorporated herein by reference. The Offer to Purchase and the related Letter of Transmittal and other relevant materials will be mailed upon request to record holders of Shares and furnished to brokers, dealers, banks, trust companies and similar persons whose names, or the names of whose nominees, appear on the Company's shareholder list or, if applicable, who are listed as participants in a clearing agency's security position listing, for subsequent transmittal to beneficial owners of Shares. The Offer to Purchase and Letter of Transmittal contain important information which should be read before any decision is made with respect to the Offer. Requests for copies of the Offer to Purchase, the Letter of Transmittal and all other tender offer materials may be directed to the Information Agent, as set forth below, and copies will be furnished promptly. Questions or requests for assistance may be directed to the Information Agent. The Information Agent for the Offer is: CNRA FINANCIAL SERVICES INC. 101 St. Clair Avenue West, Suite 1908, Toronto, Canada M4V 0A2. Call: (416) 861-9466.

May 5, 2025

4845 US Hwy 271 North | Pittsburg, TX 75686
www.tips-usa.com • 866-839-8477• tips@tips-usa.com

April 22, 2025

Daily Journal of Commerce, Inc.
Attn: Michelle Ropp

Please print the following **LEGAL NOTICE: Friday, May 2, 2025, AND Friday, May 9, 2025**.

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)
250502 Elevators and Servicing (2 Part with JOC)
250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services
250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Electronic tear sheets and affidavits are required for ALL TIPS Bid Ads.

Please email proofs, tear sheet copies, affidavit, and invoice to Brooke Scott at brooke.scott@tips-usa.com as advised by TIPS General Counsel.

Thank you,
Brooke Scott
Contracts Support
TIPS - Region 8 ESC
4845 US Hwy 271 North, Pittsburg TX 75686
www.tips-usa.com
brooke.scott@tips-usa.com
903-575-2608

Daily Journal of Commerce
1618 SW First Ave., Suite 400
Portland, OR, 97201
Phone: 503-226-1311 Fax: 503-222-5358

DJC OREGON

Affidavit of Publication

To: The Interlocal Purchasing System Tips - Brooke Scott
4845 US Hwy 271 N
Pittsburg, TX, 756864303

Re: Legal Notice 4052695, PROCUREMENT SOLICITATIONS

State of OR }
} SS:
County of Multnomah }

I, Michelle A. Ropp, being duly sworn, depose and say that I am the Principal Clerk of the Daily Journal of Commerce, a newspaper of general circulation in the counties of CLACKAMAS, MULTNOMAH, and WASHINGTON as defined by ORS 193.101 and 193.020, published in Portland in the aforesaid County and State; that I know from my personal knowledge that the notice described as:
PROCUREMENT SOLICITATIONS
The Interlocal Purchasing System
a printed copy of which is hereto annexed, was published in the entire issue of said newspaper 2 time(s) in the following issues:
05/02/2025 and 05/09/2025.

SEE EXHIBIT A

State of Oregon
County of Multnomah

SIGNED OR ATTESTED BEFORE ME ON 12th day of May 2025

By: Michelle A Ropp
Michelle A. Ropp

By: Nicholas Bjork
OFFICIAL STAMP
NICHOLAS BJORK
NOTARY PUBLIC - OREGON
COMMISSION NO. 1044188
MY COMMISSION EXPIRES JANUARY 10, 2028

Nicholas Bjork
Notary Public, State of OR
No. 1044188
My commission expires on January 10, 2028

· Perform traffic counting and intersection evaluations.

AREA 6: LAND SURVEYING

· Prepare topographic, boundary, and control surveys;

· Provide construction staking;

· Assist with monument preservation and restoration (including locating, referencing, installing monuments);

· Prepare survey maps and records including topographic, record-of-survey, right-of-way, survey control, and LCR's;

· Provide all field notes, records, adjustment data, and both raw and final measurements and coordinates; and

· Have knowledge of Washington State Plane Coordinate System and coordinate transformation techniques and parameters.

AREA 7: PAVEMENT PRESERVATION

· Provide PAVER software technical support and advanced training;

· Prepare pavement designs and recommendations, including analyzing traffic loads over a 20+-year design life;

· Analyze Portland Cement (PCC) roadway designs and make recommendations;

· Diagnose unique pavement distresses and provide design recommendations;

· Provide analysis of county-performed structural testing results with an FWD (falling weight deflectometer) and provide recommendations;

· Make visual inspections of pavements;

· Assist in developing a quality control program to monitor performance of surface treatments; and

· Analyze ground-penetrating radar reports for pavement treatments or design.

AREA 8: PARKS AND RECREATION MASTER PLANNING AND LANDSCAPE DESIGN

· Prepare conceptual, preliminary, and final landscape designs and planting plans;

· Design neighborhood, community, and regional parks, including play structures, pedestrian facilities, parking, restroom facilities, etc.;

· Develop interpretive signage;

· Design irrigation systems;

· Plan and design trails and open spaces;

· Plan and design sports and other special facilities;

· Evaluate parks and recreation-related buildings and structures;

· Prepare comprehensive park, recreation and natural resource plans;

· Prepare bicycle and pedestrian master plans; and

· Coordinate and facilitate public involvement.

AREA 9: STREAM HYDRAULICS, RESTORATION AND FISH HABITAT ENHANCEMENT

· Evaluate fluvial geomorphology;

· Assess habitat (riparian, wetland, and in-stream);

· Provide stream reconnaissance;

· Perform hydrologic, hydraulic and water quality modeling, design of stormwater facilities, stream reach and sub-basin analysis; stream stabilization design;

· Provide hydraulic analysis, engineering review and permitting support for Clark County's Flood Hazard Areas Ordinance and National Flood Insurance Program requirements using a certified floodplain manager;

· Stream corridor design, which may include streambed and bank protection or stabilization, calculate shear stresses and scour, develop streambed stone gradations, scour countermeasure, and stream grading;

· Design aquatic habitat;

· Provide bank stabilization and bioengineering designs;

· Design, support construction and monitor fish passage projects; and

· Perform cost-benefit analysis for habitat restoration projects.

AREA 10: ENVIRONMENTAL DOCUMENTATION AND PERMITTING

· Provide environmental documentation and permitting support for project

managers/coordinators. Advise managers and coordinators of environmental documentation and permitting requirements for projects;

· Develop permit application narratives, documents and exhibits; meet with agency personnel, property owners, and other consultants as required in obtaining permits;

· Conduct wetland delineations, critical/sensitive area assessments, and rare plant surveys;

· Ensure NEPA and SEPA procedures are followed during planning and designing phase of projects; develop NEPA and SEPA documents that are appropriately sized to the project impacts;

· Conduct Biological Assessments, Phase I and Phase II Environmental Site Assessments (Hazardous Waste), noise assessments, air quality analysis (i.e. project level conformity, hotspot analysis) and other specialized environmental discipline reports as necessary for NEPA procedures;

· Develop mitigation plans using Washington Department of Ecology (Ecology), US Army Corps (USACE), Washington Department of Fish and Wildlife (WDFW), and Clark County Community Development guidelines, along with developing planting plans for wetland and habitat mitigation;

· Prepare JARPA packages for permit application submittals to Ecology, USACE, WDFW, and Clark County Community Development;

· Develop permit application submittals and narratives to comply with county Wetlands and Fish and Wildlife Habitat Conservation Areas and Shoreline Master Program (Titles 40.445 and 40.460).

AREA 11: ARCHAEOLOGICAL/CULTURAL RESOURCES

· Perform Clark County Archaeological Predeterminations;

· Perform Cultural Resource Surveys;

· Perform Historic Property Surveys;

· Provide Archaeological Monitoring;

· Prepare Inadvertent Discovery Plans;

· Have knowledge of WSDOT and DAHP standards, Section 106 of National Historic Preservation Act, Washington State Executive Order 21-02, and Section 4(f) of the Transportation Act;

· Meet the minimum professional qualifications as defined by the Professional Qualifications Standards from the Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation (CFR 36 Part 61); and

· Obtain Excavation Permits from DAHP or other agencies.

AREA 12: RAILROAD ENGINEERING AND ON-TRACK SAFETY

· Prepare plans, specifications and estimates for railroad repairs;

· Provide inspection and construction management for railroad projects;

· Respond to derailment, track damage and other incidents;

· Coordinate with the FRA and the WUTC;

· Provide on-track safety services including training county employees;

· Inspect tracks, bridges, and grade crossings;

· Update safety crossing database;

· Review crossing permits; and

· Update track charts.

AREA 13: FORESTRY ENGINEERINGAND ARBORICULTURE CONSULTING

· Conduct Unit Layout & Mapping.

· Conduct Timber Cruising.

· Conduct Stocking Inventories.

· Conduct Riparian Buffer Layout.

· Supervise Logging Contracts.

· Provide Sustainable Forest Land Management Planning.

· Provide support for Urban Forestry Planning and Permitting.

· Assist with Forest Practice Permitting

· Provide certified arborist services, including tree health and survival evaluations, Tree Protection Plan preparation, and construction monitoring.

Evaluation of Applicant Qualifications

Submitted SOQ materials may be used to evaluate a firm's capabilities for upcoming county project work (less than $200,000). Selection of firms for project work may include a review of:

· key personnel

· firm experience within specific technical area

· responsiveness and ability to meet schedule

· familiarity with local, state and federal standards

· availability to respond to physical job sites in Clark County

SOQ materials may be used to develop a short list of qualified firms followed by an interview process for selection of the most qualified firm. When deemed necessary by the County, more project detail will be provided to applicants prior to any interview process. Submitted SOQs will not be used in evaluations for projects where the estimated cost is above $200,000. Projects where the estimated work exceeds $200,000 will be advertised as a separate Request for Proposal.

Schedule

· Issue 2025 Request for Qualifications May 1, 2025

· SOQs Due (County to begin use for selection in project work) June 15, 2025

Published May 2, 5, 7, 9, 12, 14, 16, 19, 21, 23, 28, 30; Jun. 2, 4, 6, 9, 11 & 13, 2025.

4053258

MEDFORD WATER COMMISSION

WATER MANAGEMENT & CONSERVATION PLAN
Bids Due 2:00 pm, June 11, 2025
REQUEST FOR PROPOSALS

Notice is hereby given that Medford Water Commission (Medford Water), by and through its Board of Water Commissioners, will receive proposals until 2:00 p.m., Local Time, Wednesday, June 11, 2025 for the following services:

WATER MANAGEMENT & CONSERVATION PLAN (WMCP) AND CONSOLIDATED WATER SYSTEM MASTER PLAN CONSULTING SERVICES

This solicitation and selection will be conducted using the Qualification Based Selection (QBS) process. Proposals packages received after the time established for receiving proposals will not be considered. Facsimile packages are not acceptable. All proposals shall be submitted as set forth in the Proposal Instructions and must contain a signed Proposal Submission Form. Medford Water is not responsible for proposals presented in any manner, format or to any delivery point other than as required by the Request for Proposals (RFP) Document.

NOTE: RFP Documents will be available electronically for download at http://www.medfordwater.org at no charge on the date specified in "Section II - Schedule" of this RFP. On the homepage under the "Doing Business" dropdown, select "Bids, RFPs and RFQ's". Find the RFP titled **"WATER MANAGEMENT & CONSERVATION PLAN (WMCP) AND CONSOLIDATED WATER SYSTEM MASTER PLAN CONSULTING SERVICES",** then select 'Click here for documents' in the Plans row. Contact Mark Depner, Purchasing & Contract Administrator at mark.depner@medfordwater.org or (541) 774-2459 to register and obtain the login password. Printed RFP documents will not be mailed by Medford Water. Respondents should check the website regularly until the RFP due date and time to avoid missing any addenda, which will only be available online. Respondents who obtain their RFP documents only from plan centers, or by means other than the Medford Water website, are responsible for ensuring they have all addenda; they will not be registered or appear on the list of plan-holders and will not receive notifications from Medford Water regarding this RFP.

A voluntary pre-proposal conference for all firms interested in submitting a proposal will be held at 11:00 a.m., Tuesday, May 13, 2025, through a Microsoft Teams meeting. This meeting may be used to provide additional information and to answer questions about the required services, Medford Water expectations, and the evaluation process. Statements made by Medford Water's representatives at the meeting are not binding upon Medford Water unless confirmed by Written Addendum; any change to, or interpretation of, the RFP document by Medford Water shall be accomplished by Written Addendum.

https://teams.microsoft.com
Teams Meeting ID: 218 088 464 576 9 Passcode: 2yk3ug9L
or dial in by phone: (971)337-2445 / phone conference ID: 322052558#

The single point of contact for questions regarding the RFP, proposal process, clarification, award process, protests, or any other issues that arise, is Brian Runyen, Engineering Manager at (541) 774- 2428 or brian.runyen@medfordwater.org.

Each proposer must sign and submit the Proposal Submission Form which contains a statement as to whether the proposer is a resident, as defined in ORS 279A.120. Proposers will be selected to provide services based upon proposals evaluation; Medford Water does not guarantee any amount of work as a result of this RFP. Medford Water reserves the right to reject any or all Proposals and to waive irregularities or informalities in a proposal or in the opening and may cancel the procurement in accordance with ORS 279B.100. A sample contract is included as Exhibit A; award of the contract will be subject to approval of the Board of Water Commissioners.

Dated this 1st day of May, 2025.

BOARD OF WATER COMMISSIONERS
CITY OF MEDFORD, OREGON
Brad Taylor, General Manager

Published May 2, 2025. 4053400

CITY OF Vancouver WASHINGTON

COMMISSIONING SERVICES FOR THE VANCOUVER PUBLIC WORKS OPERATIONS CAMPUS
Qualifications Due 3:00 pm, June 4, 2025
REQUEST FOR QUALIFICATIONS
RFQ# 35-25

Notice is hereby given that the City of Vancouver, Washington, will receive sealed responses up to the hour of **3:00 p.m., Pacific Local Time, June 4, 2025**, for the following:

The City of Vancouver is seeking statements of qualifications from qualified firms/individuals for commissioning firms to perform commissioning services for the City of Vancouver Public Works Operations Center located at 8713 NE 94th Ave Vancouver, WA 98662.

The City of Vancouver in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252,42 U.S.C. 2000d to 2000d-4) and the Regulations, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

The City of Vancouver is committed to providing equal opportunities to State of Washington certified Minority, Disadvantaged and Women's Business Enterprises in contracting activities. (Section 4 of Chapter 56, Laws of 1975, 1st Ex. Sess., State of Washington).

RFQ documents may be obtained from the City of Vancouver Procurement Services website at: https://cityofvancouver.bonfirehub.com. These are available for viewing, downloading and printing on your own equipment, free of charge.

Published May 2, 2025. 4053264

NIXYAAWII COMMUNITY FINANCIAL SERVICES

NCFS FOOD TRUCK PARK DEVELOPMENT
INVITATION TO BID

General Contractor Services: "NCFS Food Truck Park Development" for Nixyaawii Community Financial Services (NCFS) in Mission, OR. Due Date: 04/22/2025. Intent to Award: 04/24/2025. Notice To Proceed: 05/02/2025 Issuing Agency: Nixyaawii Community Financial Services NCFS intends in proceeding with a contract with Bryson Picard Grading & Excavating, LLC; 47559 Short Mile Road, Pendleton, OR 97801. Please direct any questions regarding this notice to Shandiin Yessilth, Wenaha Group, ShandiinY@wenahagroup.com.

Published May 2, 2025. 4053266

REDMOND SCHOOL DISTRICT

ANNOUNCEMENT OF REQUEST FOR QUALIFICATIONS
ADDENDA

The Redmond School District Request for Qualifications issued on April 25, 2025 is issuing an addendum in response to questions for clarification, it will be released on May 2, 2025.

The Redmond School District Wide Commission RFQ Addendum 1 will be available for download at http://hmkco.org/bid-documents/.

Please check for potential further addenda on May 8, 2025.

Published May 2, 2025. 4053387

SWEET HOME SCHOOL DISTRICT

LONG-RANGE FACILITY PLAN
Proposals Due 3:00 pm, May 27, 2025
REQUEST FOR PROPOSALS

The Sweet Home School District is seeking proposals from qualified firms to provide the district with a facilities assessment on six schools and assist in the development of a Long-Range Facility Plan.

Proposals will be accepted until May 27, 2025 at 3 p.m. Project work shall be completed by 10/31/25. A copy of the RFP may be obtained from district's website at www.sweethome.k12.or.us/business/

Published May 2, 2025. 4053289

THE INTERLOCAL PURCHASING SYSTEM

PROCUREMENT SOLICITATIONS
Proposals due June 20, 2025 at 3:00 pm
REQUEST FOR PROPOSALS

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

250502 Elevators and Servicing (2 Part with JOC)

250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services

250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Published May 2 & 9, 2025.

4052695

END OF FIRST TIME PUBLISHED

CONSTRUCTION

CLACKAMAS RIVER WATER

TAYLOR TERRACE PAVING
Bids Due 2:00 pm, May 13, 2025
INVITATION TO BID
PROJECT 22-2315

Sealed bids marked **"Taylor Terrace Paving"** will be received by Karin Holzgang, Contracts Coordinator, at the Clackamas River Water Office, located at 16770 SE 82nd Drive, Clackamas, Oregon 97015. Bids must be received at the location noted above no later than **2:00 PM** Pacific Time on **Tuesday, May 13th, 2025**, at which time the bids will be publicly opened and read. There will be a remote option for the bid opening. Remote access information will be posted on the CRW website at https://crwater.com/contracting-opportunities/ at least seven days prior to the bid opening. All Bidders must submit a list of their first-tier subcontractors, as required by ORS 279C.370, in a separate envelope no later than 4:00 PM Pacific time that same day. Any and all bids received after the deadline for submission, or for which the list of first-tier subcontractors has not been submitted by the deadline for disclosure of first-tier subcontractors, shall be declared "non-responsive" and shall not be considered for award. A contract will be awarded or bids rejected within 30 calendar days after the opening.

Bid Opening

1. Bids will be opened by CRW staff in the CRW Board Room at the date and time stipulated above.

2. The bid opening may be attended in person in the Board Room or viewed by Zoom meeting. Information on connecting to the Zoom meeting will be found on the CRW website at https://crwater.com/contracting-opportunities/ at least seven days prior to the bid opening.

3. Bid results will be available on the CRW website at https://crwater.com/contracting-opportunities/.

of the discipline area should be emphasized.

4. Respondent's Capabilities - Provide information on projects the firm or team members have worked on that demonstrate the firm's capabilities.

5. Resumes - Resumes for key staff members may be included.

6. Page Limit - Statements of qualification for each discipline area should number no more than ten (10) pages, excluding cover sheet and resumes.

7. All SOQs should be in .pdf format.

Request for Qualifications - Clark County, Washington

Below are the discipline areas for which SOQs are being solicited, as well as examples of the manner of service that may be requested in each discipline area.

AREA 1: CIVIL DESIGN

· Prepare alternative analyses, plans, specifications and cost estimates;

· Provide utility coordination, QA/QC, peer review and value engineering;

· Support construction with site visits and review of submittals;

· Provide Project Management support; and

· Assist with preparation of grants and coordination with granting agencies.

AREA 2: CONSTRUCTION MANAGEMENT

· Manage the advertisement, bid and award of capital and preservation construction projects;

· Oversee contractor operations for compliance with contract, plans, specifications and related documents;

· Manage change conditions, claims and protests including documentation and agency response;

· Prepare payments to contractors;

· Maintain documentation to local, state and federal standards;

· Coordinate utilities; and

· Review and recommend changes to design plans and specifications to address constructability, staging, access, etc.

AREA 3: STRUCTURAL ENGINEERING

· Prepare Type, Size and Location (TS&L) documents as required by WSDOT Highways and Local Programs;

· Provide load rating analysis (including over size and overweight loads);

· Develop designs for bridges, culverts, headwalls, inlet structures, rail retrofits, retaining walls, and sound walls;

· Make seismic analysis of existing structures and design of retrofits;

· Understand and able to follow WSDOT, AASHTO, and FHWA design standards;

· Evaluate scour and design mitigation using HEC-18 and HEC-23;

· Have experience with in-service bridge inspection and WSDOT and FHWA documentation; and · Provide support for emergency response.

AREA 4: GEOTECHNICAL ENGINEERING

· Review existing information and maps to characterize soil conditions;

· Identify slope stability hazards and be able to measure and monitor slope stability and landslide movement;

· Prepare exploration plans, perform borings and samplings, acquire necessary permits, prepare and implement traffic control plans;

· Measure and monitor groundwater elevations;

· Provide groundwater analysis and modeling;

· Test soil samples for engineering properties;

· Prepare reports with findings, conclusions and recommendations;

· Complete geotechnical design for retaining walls, foundations, and trench shoring;

· Perform seismic risk analyses and analysis of subsidence due to construction;

· Evaluate geotechnical considerations for trenching, pipe-jacking, and micro-tunneling;

· Provide geotechnical design for full depth reclamation roadway projects;

· Provide bridge foundation design and substructure recommendations; and

· Provide bridge slope stability and scour analysis required information.

AREA 5: TRAFFIC ENGINEERING

· Provide traffic modeling and transportation planning;

· Prepare designs for signals and Intelligent Transportation Systems;

· Develop signing and striping plans;

· Provide detour plans and incident management;

· Design railroad crossings and railroad signals;

· Assist with neighborhood traffic management;

· Evaluate roadway and intersection safety;

· Provide circulation planning and roadway alignment studies;

· Evaluate transportation concurrency;

· Provide ESAL (Equivalent Single Axel Load) training;

· Develop ITS asset inventory and management;

· Provide grant scoping and cost estimates for roundabout and signalized intersections;

· Review and comment on geometric layouts of single and multi-lane roundabouts;

· Provide roundabout and signal intersection control evaluations; and

· Perform traffic counting and intersection evaluations.

AREA 6: LAND SURVEYING

· Prepare topographic, boundary, and control surveys;

· Provide construction staking;

· Assist with monument preservation and restoration (including locating, referencing, installing monuments);

· Prepare survey maps and records including topographic, record-of-survey, right-of-way, survey control, and LCR's;

· Provide all field notes, records, adjustment data, and both raw and final measurements and coordinates; and

· Have knowledge of Washington State Plane Coordinate System and coordinate transformation techniques and parameters.

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· Provide PAVER software technical support and advanced training;

· Prepare pavement designs and recommendations, including analyzing traffic loads over a 20+-year design life;

· Analyze Portland Cement (PCC) roadway designs and make recommendations;

· Diagnose unique pavement distresses and provide design recommendations;

· Provide analysis of county-performed structural testing results with an FWD (falling weight deflectometer) and provide recommendations;

· Make visual inspections of pavements;

· Assist in developing a quality control program to monitor performance of surface treatments; and

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AREA 8: PARKS AND RECREATION MASTER PLANNING AND LANDSCAPE DESIGN

· Prepare conceptual, preliminary, and final landscape designs and planting plans;

· Design neighborhood, community, and regional parks, including play structures, pedestrian facilities, parking, restroom facilities, etc.;

· Develop interpretive signage;

· Design irrigation systems;

· Plan and design trails and open spaces;

· Plan and design sports and other special facilities;

· Evaluate parks and recreation-related buildings and structures;

· Prepare comprehensive park, recreation and natural resource plans;

· Prepare bicycle and pedestrian master plans; and

· Coordinate and facilitate public involvement.

AREA 9: STREAM HYDRAULICS, RESTORATION AND FISH HABITAT ENHANCEMENT

· Evaluate fluvial geomorphology;

· Assess habitat (riparian, wetland, and in-stream);

· Provide stream reconnaissance;

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· Design, support construction and monitor fish passage projects; and

· Perform cost-benefit analysis for habitat restoration projects.

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· Develop permit application narratives, documents and exhibits; meet with agency personnel, property owners, and other consultants as required in obtaining permits;

· Conduct wetland delineations, critical/sensitive area assessments, and rare plant surveys;

· Ensure NEPA and SEPA procedures are followed during planning and designing phase of projects; develop NEPA and SEPA documents that are appropriately sized to the project impacts;

· Conduct Biological Assessments, Phase I and Phase II Environmental Site Assessments (Hazardous Waste), noise assessments, air quality analysis (i.e. project level conformity, hotspot analysis) and other specialized environmental discipline reports as necessary for NEPA procedures;

· Develop mitigation plans using Washington Department of Ecology (Ecology), US Army Corps (USACE), Washington Department of Fish and Wildlife (WDFW), and Clark County Community Development guidelines, along with developing planting plans for wetland and habitat mitigation;

· Prepare JARPA packages for permit application submittals to Ecology, USACE, WDFW, and Clark County Community Development;

· Develop permit application submittals and narratives to comply with county Wetlands and Fish and Wildlife Habitat Conservation Areas and Shoreline Master Program (Titles 40.445 and 40.460).

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· Perform Cultural Resource Surveys;

· Perform Historic Property Surveys;

· Provide Archaeological Monitoring;

· Prepare Inadvertent Discovery Plans;

· Have knowledge of WSDOT and DAHP standards, Section 106 of National Historic Preservation Act, Washington State Executive Order 21-02, and Section 4(f) of the Transportation Act;

· Meet the minimum professional qualifications as defined by the Professional Qualifications Standards from the Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation (CFR 36 Part 61); and

· Obtain Excavation Permits from DAHP or other agencies.

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· Prepare plans, specifications and estimates for railroad repairs;

· Provide inspection and construction management for railroad projects;

· Respond to derailment, track damage and other incidents;

· Coordinate with the FRA and the WUTC;

· Provide on-track safety services including training county employees;

· Inspect tracks, bridges, and grade crossings;

· Update safety crossing database;

· Review crossing permits; and

· Update track charts.

AREA 13: FORESTRY ENGINEERINGAND ARBORICULTURE CONSULTING

· Conduct Unit Layout & Mapping.

· Conduct Timber Cruising.

· Conduct Stocking Inventories.

· Conduct Riparian Buffer Layout.

· Supervise Logging Contracts.

· Provide Sustainable Forest Land Management Planning.

· Provide support for Urban Forestry Planning and Permitting.

· Assist with Forest Practice Permitting

· Provide certified arborist services, including tree health and survival evaluations, Tree Protection Plan preparation, and construction monitoring.

Evaluation of Applicant Qualifications

Submitted SOQ materials may be used to evaluate a firm's capabilities for upcoming county project work (less than $200,000). Selection of firms for project work may include a review of:

· key personnel

· firm experience within specific technical area

· responsiveness and ability to meet schedule

· familiarity with local, state and federal standards

· availability to respond to physical job sites in Clark County

SOQ materials may be used to develop a short list of qualified firms followed by an interview process for selection of the most qualified firm. When deemed necessary by the County, more project detail will be provided to applicants prior to any interview process. Submitted SOQs will not be used in evaluations for projects where the estimated cost is above $200,000. Projects where the estimated work exceeds $200,000 will be advertised as a separate Request for Proposal.

Schedule

· Issue 2025 Request for Qualifications May 1, 2025

· SOQs Due (County to begin use for selection in project work) ~~June 15, 2025~~

· ***Amended Due Date of June 17th, 2025, by 3:00 p.m.***

Published May 2, 5, 7, 9, 12, 14, 16, 19, 21, 23, 26, 28, 30; Jun. 2, 4, 6, 9, 11 & 13, 2025.

4053258

DESCHUTES COUNTY FACILITIES

A/E SERVICES DOWNTOWN CAMPUS PLAN
Proposals Due 2:00 pm, June 5th, 2025
REQUEST FOR PROPOSALS

Deschutes County requests proposals from qualified firms for design services to develop a campus plan for the Deschutes County Downtown Campus located in Bend, Oregon. The successful proposer will engage with campus stakeholders to develop goals and objectives for the downtown campus, provide case studies of relevant civic campuses, and develop a design framework for the campus. The final deliverable will be a single report that details future development opportunities, anticipates growth, and establishes a clear vision for the services provided on the campus with near-term, mid-term, and longterm plans with conceptual cost estimates.

There will be a MANDATORY Pre-Proposal Meeting on May 15th, 2025 at 11:00 a.m. in the DeArmond Room of the Deschutes Services Building located at 1300 NW Wall Street, Bend, OR 97703. This RFP is available electronically through Deschutes.org/rfps and future notices regarding this solicitation, including solicitation addendum/a, will be posted to the same website. Questions and inquiries should be directed to Eric Nielsen, Capital Improvement Manager, eric.nielsen@deschutes.org, 541-330-8252. Sealed proposals shall be received no later than 2:00 p.m., current local time, June 5th, 2025 at:

Mailing:
Deschutes County Facilities
ATTN: Eric Nielsen
P.O. Box 6005
Bend OR, 97708-6005

Physical Drop-Off Address:
Deschutes County Facilities
ATTN: Eric Nielsen
14 NW Kearney Avenue
Bend, OR, 97703

Deschutes County may reject any proposal not in compliance with prescribed procedures and requirements and may reject for good cause any and all proposals upon a finding that it is in the public interest to do so. Deschutes County is not responsible for any costs of any proposers incurred while submitting proposal; all proposers who respond to solicitations do so solely at their own expense.

Published May 7 & 9, 2025.

4054622

SKAMANIA COUNTY

BUNDLED BRIDGES PREVENTATIVE MAINTENANCE PROJECT
Bids Due 10:00 am, May 29, 2025
INVITATION TO BID
FEDERAL AID# BHOS-2030(011)
CRP #2024-02

Skamania County (COUNTY) is seeking qualifications from engineering consulting services to design and facilitate the resurface, repair of superstructure, and other methods of preventative maintenance on 104 Salmon Falls, 105 Hatchery, and 210 Moore bridges. Deliverables include:

Preliminary Engineering (PE):

· Permitting - environmental, archeological etc.

· Surveying, Right-of-Way / Easement research and needs determination

· Plans, Specifications, and Estimates (PS&E), stamped by professional engineer registered in the State of Washington

· Stamped Contract development including Special Provisions

The COUNTY may supplement the consultant agreement to include future phases (RW, CN) including:

Right-of-Way (RW) :

· If ROW is needed - Appraisals and Reviews, Acquisitions, Relocation and Property Management according to the Uniform Relocation Act and detailed in WSDOT's Right-of-Way Manual and Lag Manual.

Construction Phase (CN):

· Record of Materials, RAM reviews, Buy America, Build America Buy America, CMOs, etc.

· Construction inspection and oversight, project management assistance, closure etc.

The anticipated timeline for the project is from June 2025 through December 2028. The county needs to obligate the Construction Phase by August 2026. Additional information for this RFQ is available online at

Request for Qualifications ? Skamania County

https://www.skamaniacounty.org/departments-offices/public-works/request-for-qualifications

The contract type is **Local Agency Professional Service Negotiated Hourly Rate Consultant Agreement**.

The DBE goal for this project is 16%.

Submittals are due no later than 10:00 A.M. Thursday, May 29, 2025. Submittals will not be accepted after that time and date. Consultant qualifications requirements, special provisions, how the consultant submittals will be evaluated, and schedule for the procurement process are available at the agency's website link above. Any questions regarding this project should be directed to Sadi' Stouder-Pettenger at 509-427-3910 or sadi@co.skamania.wa.us.

"Skamania County, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252,42 U.S.C. 2000d to 2000d-4) and the Regulations, hereby notifies all bidders that will affirmatively ensure that any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

Skamania County in accordance with Section 504 of the Rehabilitation Act (Section 504) and the Americans with the Americans with Disabilities Act (ADA), commits to nondiscrimination on the basis of disability, in all of its programs and activities. This material can be made available in an alternate format by emailing Sadi' Stouder- Pettenger at sadi@co.skamania.wa.us or by calling 509.427.3910.

Published Apr. 25, 28, 30; May 2, 5, 7, 9, 12, 14, 16, 18, 21, 23 & 28.

4051381

THE INTERLOCAL PURCHASING SYSTEM

PROCUREMENT SOLICITATIONS
Proposals due June 20, 2025 at 3:00 pm
REQUEST FOR PROPOSALS

The Interlocal Purchasing System (TIPS) has posted procurement solicitations at www.tips-usa.com for the following categories:

250501 Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

250502 Elevators and Servicing (2 Part with JOC)

250503 MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services

250504 Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

The proposal is due and will be opened on **June 20, 2025, at 3:00 pm local time**. Call 866-839-8477 for problems with website or questions.

Published May 2 & 9, 2025.

4052695

Glenn Hegar
Texas Comptroller of Public Accounts

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Electronic State Business Daily

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Approve

Disaster Restoration and Emergency Recovery Services (2 Part with JOC)

Modify (solicitation-create?identification=250501.)

Cancel

Solicitation ID: 250501.
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:40 am
Class/Item Code:
25735-Disaster Survival Equipment, Kits, and Supplies; 99030-Disaster Relief Services; 99060-Disaster Site Clean-up and Recovery Services;

Solicitation Description:

This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

Attachments Internal Notes

Attachments Upload File

ESBD_414741_1745933953152_TXSMART BUY LINK.docx X

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Search from the Texas State Library (https://www.tsl.texas.gov/trail/index.html)
Texas Homeland Security (https://www.dhs.gov/see-something-say-something/reporting/texas)
Public Information Act (https://comptroller.texas.gov/about/policies/open-records/public-information-act.php)
Texas Secretary of State (https://www.sos.state.tx.us/)
HB 855

Other State Sites

Texas.gov (https://texas.gov)
Texas Records and Information Locator(TRAIL) (https://www.tsl.state.tx.us/trail/)
State Link Policy (https://dir.texas.gov/resource-library-item/state-website-linking-privacy-policy)
Texas Veterans Portal (https://veterans.portal.texas.gov)

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Elevators and Servicing (2 Part with JOC)

Approve

Modify (solicitation-create?identification=250502)

Cancel

Solicitation ID: 250502
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:45 am
Class/Item Code:
29500-Elevators, Escalators, And Moving Walks (Building Type); 91013-Elevator Installation, Maintenance, Repair and Inspection Services;
Solicitation Description:
This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

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Texas Homeland Security (https://www.dhs.gov/see-something-say-something/reporting/texas)
Public Information Act (https://comptroller.texas.gov/about/policies/open-records/public-information-act.php)
Texas Secretary of State (https://www.sos.state.tx.us/)
HB 855

Other State Sites

Texas.gov (https://texas.gov)
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Texas Veterans Portal (https://veterans.portal.texas.gov)

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Modify (solicitation-create?identification=250503)

Cancel

MRO (Maintenance, Repair and Operations of Facilities and Grounds) Supplies, Equipment, Tool Rental, Sales and Services

Solicitation ID: 250503
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:51 am
Class/Item Code:
95815-Building And Facilities Management Services; 91000-Building Maintenance, Installation And Repair Services; 98836-Grounds and Roadside Maintenance: Mowing, Edging, Plant, Not Tree Trimming, etc.;
Solicitation Description:

This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

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Texas Veterans Portal (https://veterans.portal.texas.gov)

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Job Order Contracting (eConverge JOC) (2 Part with CJP Accreditation)

Modify (solicitation-create?identification=250504)

Cancel

Solicitation ID: 250504
Status: Pending On Posting Date
Contact Name: TIPS
Contact Number: (866) 839-8477
Contact Email: bids@tips-usa.com
Response Due Date: 6/20/2025
Response Due Time: 3:00 PM
Agency/Texas SmartBuy Member Number: E2250
Posting Requirement: 21+ Days for Solicitation Notice
Solicitation Posting Date: 5/1/2025
Last Modified: 4/29/2025 8:56 am
Class/Item Code:
90900-Building Construction Services, New (Incl. Maintenance And Repair Services); 91400-Construction Services, Trade (New Construction); 91200-Construction Services, General (Incl. Maintenance And Repair Services); 91300-Construction Services, Heavy (Incl. Maintenance And Repair Services); 91024-Fire And/Or Water Damage Restoration Services;
Solicitation Description:

This is a prospective use solicitation and not asolicitation for a specific project. Find complete solicitation documents at https://www.tips-usa.com/rfp.cfm

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Texas Veterans Portal (https://veterans.portal.texas.gov)

Supplier Participation

250502

Elevators and Servicing (2 PART with JOC)

Issue Date: 5/1/2025
Response Deadline: 6/20/2025 03:00 PM (CT)

Contact Information

Address: Region 8 Education Service Center
4845 US Highway 271 North
Pittsburg, TX 75686
Phone: +1 (866) 839-8477
Email: bids@tips-usa.com

Participation Summary

Supplier	Email Status	Response Status
(FSS) Foodservice Sustainability Solutions		No Response
11 Series Energy, Inc.		No Response
152nd LLC		No Response
1880 Hospitality		No Response
1st Fire Protection Services		No Response
21st Century General Supply		No Response
360 clean (burger board llc)		No Response
360TXC, LLC		No Response
369 Global LLC		No Response
3DCapture Services (JRC Repair Service, LLC)		No Response
3G CONTROLS INC (3G CONTROLS INC)		No Response
3Sintegration (3Sintegration, LLC)		No Response
4 Moore Construction Solutions		No Response
4T Partnership LLc		No Response

535 transport and services (535 transport and services)		No Response
5F Mechancial Group, Inc.		No Response
8/A Builders LLC		No Response
A and R Construction, LLC		No Response
A P Fire Protection (A P Fire Protection)		No Response
A&H Electric		No Response
A&S Air Conditioning LLC		No Response
A+ Floor Installers LLC		No Response
A-1 FIRE & SECURITY (Fire & Access Control Systems)		No Response
A-1 Refrigeration & A/C, LLC		No Response
A5NR General Construction LLC		Viewed
A6 Scientific Corp.		No Response
AAA Veteran Air, LLC.		No Response
A-Action Janitorial Service Inc.		No Response
AB Martin Services, Inc.		No Response
Abanty Systems LLC	Fail	No Response
Abanty Systems LLC (ENVIRONMENTAL MULTISERVICE CONTRACTING SOLUTIONS LLC)		No Response
ABM Building Services, Austin		No Response
ABM Commercial Flooring Inc. (ABM Commercial Flooring Inc.)		No Response
ABM Industry Groups, LLC (ABM Industries Incorporated)		No Response
A-Bridge LLC		No Response
Absolute Defense/Clear Defense		No Response
acity specialty product dba zep sales and service		No Response
Acme Soap Company (Acme Soap,INC.)		No Response
ACO Remodeling & Construction, Inc.		No Response
Action Electrical Services LLC (Action Electrical Services LLC)		No Response
ACTION Janitorial Paper safety (Action Chemical, Inc.)		No Response
Acumen Enterprises, Inc.		No Response
ADA Business Supplies Inc. (ADA Business Supplies Inc.)		No Response
Adapt (SpaceCo Business Solitions, Inc. DBA Adapt Global)		No Response
Adept Facilities & Design		No Response
Advance Electric Company Inc.		No Response

Advanced Blending, Inc. DBA: LAst Group Enterprises		No Response
Advanced Management Group, LLC		No Response
Advancia Technologies, LLC		No Response
Advantage Access and Mobility		No Response
Aerus Electrolux (PH Enterprises, LLC)		No Response
AFA Protective Systems, Inc.		No Response
AFD Services LLC (AFD Services LLC)		No Response
AHM Cleveland		No Response
Air Craft Mechanical		No Response
Air Filter Systems, Inc.		No Response
Air Systems AC LLC		No Response
Airco Mechanical		Viewed
AIRIFY, INC.		No Response
Alklean Industries, Inc (Alklean Industries, Inc)		No Response
ALL SOUTH SHORE MEDICAL SUPPLY INC		No Response
All Water Mechanical		No Response
All wired electrical services (All wired electrical services)		No Response
Allied Express Solutions		No Response
Allied Services Company (Allied Pressure Washing LLc)		No Response
Allied Universal Technology Services		No Response
All-Rite Doors & Hardware (All-Rite Installations, LLC)		No Response
Allstar Services Group, LLC (Allstar Services Group, LLC)		No Response
All-Type Vacuum & Janitorial Supply		No Response
AlmsTravel LLC (AlmsTravel LLC)		No Response
AMCorp, LLC (AMCorp, LLC)		No Response
America Cleaning Solutions, Inc.		No Response
American CMG Services	Fail	No Response
american pride paper and plastic (american pride paper and plastic)		No Response
AmeriTex Elevator Services		No Response
Ampere Networks (NiOTA iNC)		No Response
AMS of Texas, LLC (American Mechanical Services of Texas, LLC)		No Response
Amstar, Inc.		No Response

Anchor Supply (Anchor Group Collective LLC)	No Response
Andon Solutions LLC	No Response
Anointed Multi-Services (Anointed Multi-Services)	No Response
Anthony Bryant (Anthony Bryant)	No Response
AnyDesk Software (AnyDesk Software)	No Response
AO3 Solutions, LLC (AO3 Solutions, LLC)	No Response
AP Gulf States Inc. dba Adolfson and Peterson Construction	No Response
Apollo Mechanical Contractors dba Apollo Solutions Group (Apollo Sheet Metal, Inc)	No Response
Apollo Metro Solutions (Apollo Metro Solutions, Inc.)	No Response
Applied Climate Solutions	No Response
Aqua Clear Water Solutions LLC	No Response
Arkansas Elevator llc	Viewed
Arkansas Office Products, Inc	No Response
Arlos Group, LLC	No Response
Armstrong Plumbing Air Electric	No Response
Armstrong Relocation (Armstrong Moving Solutions, San Antonio, LLC)	No Response
Armstrong Repair Center, INC	No Response
Arribatel America, LLC (Arribatel America, LLC)	No Response
ARS Commercial Equiment (baker)	No Response
ARSS CONSTRUCTION SERVICES LLC	No Response
Arthur Rose LLC	No Response
Asay & Sons Commercial	No Response
ASC Environmental Services (ASC Environmental Services)	No Response
Ascendancy Services Group LLC	No Response
ASD Consultants, Inc. (ASD Consultants, Inc.)	No Response
ASE Construction, LLC	No Response
Ashcraft's Lock & Door Hardware Co. (Ashcraft's Lock & Door Hardware Co.)	No Response
Ashford Building Solutions LLC (Ashford Building Solutions LLC)	No Response
ASSETWORKS	No Response
ATIS Elevator Inspections LLC	No Response
Atlantic Construction Sales	No Response

Atlas Commercial Renovations (Mulhern Carper Enterprises, LLC)		Viewed
Atomatic Mechanical (Atomatic Mechanical)		No Response
Aurum Coast Distribution LLC		No Response
Avad, LLC		No Response
Avenues International Inc.		No Response
AVIATE ENTERPRISES, INC.		Viewed
Avid Products, Inc.		No Response
Avighna Business Advsiors LLC		No Response
AVLZ PROFESSIONAL SERVICES LLC		No Response
Av-Ology Inc.		No Response
AWB Consulting		No Response
Azteca Designs and Construction (AZTECA DESIGNS, INC)		No Response
Azteca Enterprises, LLC		No Response
B & S Hardware, Inc.		No Response
B&J electrical (B&J electrical)		No Response
B&M Construction, Inc.		No Response
B2Z Engineering		No Response
Baltimore-Washington Contracting, Inc.		No Response
BAM Flooring, Inc.		No Response
Banks Business Center		No Response
Banks Property Management, LLC		No Response
Barnette Consulting Group		No Response
Bassco Services Incorporated		No Response
Batteries Plus (B Garth Co)		No Response
Bawse Enterprises, LLC (Blafrican Bawse Enterprises, LLC)		No Response
Baxter (Western-BRW Paper Co., Inc)		No Response
Bayside Builders MI LLC		No Response
BBVA Compass		No Response
BCI Services, INC.		No Response
Bearacade® (National School Control Systems, LLC.)	Fail	No Response
Beckwith Electronic Engineering Company		No Response
BELKNAP CONCRETE CUTTING & DRI		No Response

Bella Luna Engineering & Building Maintenance (Bella Luna Engineering & Building Maintenance)	No Response
Benchmark Building & Construction, LLC (Benchmark Building & Constructi on, LLC)	No Response
Bendler Boiler & Mechanical CO (Bendler Boiler & Mechanical CO)	No Response
Benny Building Maintenance Services LLC (Benny Building Maintenance Se rvices LLC)	No Response
Beshears Construction Inc	No Response
Best Value Management	No Response
Bethune Painting Inc	Viewed
Bienenstock Natural Playgrounds Inc. US	No Response
BioGreen of San Antonio	No Response
Biologique Solutions LLC	No Response
BioPURE (Jpete enterprises)	No Response
Blast Masters, Inc.	No Response
Bloomin' Blinds of Richmond (Mana, Inc.)	No Response
Blue Ribbon Fence Company, LLC	No Response
Bluejacket Industries Materials, LLC	No Response
BlueRock CG, LLC (BlueRock CG, LLC)	No Response
Bluum Technology USA	No Response
BNC Industries, INC.	No Response
Boen/Kemp Construction (Boen/Kemp Construction)	No Response
Bonded Lightning Protection Systems, Ltd.	No Response
BOOSTERS, INC	No Response
Bosanna llc	Submitted
Botton + Gardiner, Func (BARESQUE USA LLC)	No Response
Bowman Recruitment Solutions LLC	No Response
Boyter Brothers, LLC	No Response
Brad Drake Construction LLC	No Response
BradyPLUS Company (Brady Industries of Texas, LLC)	No Response
Branch Construction Group LLC	No Response
Bravery Construction	No Response
BreezyDay LLC (BreezyDay LLC)	No Response
Brewer-Garrett Company (Brewer-Garrett Company)	No Response

Brian D. Smith Cleaning Service LLC (Brian D. Smith Cleaning Service LLC)	No Response
Brinton Security Services (Brinton Electric Security Services LLC)	No Response
Brown Midwest Commercial Construction (Brown Midwest Commercial Con struction)	No Response
BTG Products (Buffalo Technology Group, Ltd.)	No Response
BTX Construction Group	No Response
Buck Services Incorporated	No Response
Buckles Resources LLC	No Response
Buoy Bros. Construction LLC	No Response
Burggraf Services, Inc	No Response
Burlington Industries	No Response
Burman Construction, LLC	No Response
Bush Sports Turf (Bush Sports Turf)	No Response
Business Furniture Inc.	No Response
Butler Insurance Network (Christopher Alan Butler)	No Response
C & D Modular Construction LLC	No Response
c3 sports n more	No Response
Cactus Industrial Services LLC (Cactus Industrial Services LLC)	No Response
CAET PMC (CAET Project Management Consultants, LLC)	No Response
Calidad Construction, LLC	No Response
California Hydronics Corporation	No Response
Cannon Services	No Response
Cantore Construction Company (Cantore Box Cabinet and Maintenance, Inc .)	No Response
Capital Pump & Equipment	No Response
Capital Shade LLC	No Response
Capitol AC Services	No Response
Captain Construction Co. LLC	No Response
Car Wrap City	No Response
Carter and Company (Walter M Carter Inc)	No Response
Carter-Lambert Divisions, LLC	No Response
Cartwright Tree Care	No Response

Castletop Logistics LLC		No Response
Casto Technical Services, Inc.		No Response
Catalyst PR		No Response
Catawba Lighting Solutions LLC		No Response
CATI Striping & Coating	Fail	No Response
CB Ketsal LLC		No Response
CB3, LLC (CB3 CONSULTANTS)		No Response
CBRE, Inc.		No Response
CCS Facility Services (CCS Facility Services)		No Response
CDM7 LLC (CDM7 LLC)		No Response
Centex Softwash (Evan Rossow)		No Response
Central Texas Elevator, LLC		Submitted
CentralSquare Technologies, LLC		No Response
Centrix Energy Partners LLC		No Response
CERRIS SYSTEMS INC National (Cerris Systems Inc)		No Response
CertainTeed Roofing		No Response
CF SUPPLY INC		No Response
CFE Services (May Enterprises, Inc)		No Response
Chadwell Supply (Chadwell Supply, Inc.)		No Response
Chappell's Cleaning Services, LLC		No Response
Charles Pest Control Services, Inc.		No Response
Chatham Worth (Chatham Worth)		No Response
Chenega Corporation		No Response
Chickasaw Management Services		No Response
Chicos Trail Inc DBA Little Guys Movers Waco		No Response
Chiller Services Inc (Chiller Services Inc)		No Response
Chilltex, LLC		No Response
Chrome Heating & Air Conditioning (Chrome Heating & Air Conditioning)		No Response
Cintas Corporation No. 2		No Response
circle c mechanical llc		No Response
City Fire Protection LLC		No Response
City Wide Facility Solutions (City Wide Maintenance Co. Inc.)		No Response

Clean and Bright Cleaning Services		No Response
Clean It Industrial		No Response
Clean Scapes		No Response
Clean SoftWash		No Response
Clean Surface LLC		No Response
Cleaning USA, LLC (Cleaning USA, LLC)	Fail	No Response
Clear-Armor LLC		No Response
Clermont Printing & Office Products (Clermont Printing Inc.)		No Response
Click Construction Services (Click Construction Services)		No Response
Climax Investors (Climax Investors)		No Response
Coach's Construction		No Response
Coastal Machine & Mechanical, LLC		No Response
Coastal Packaging Co., Inc.		No Response
Coastal Remediation (Coastal Remediation)		No Response
Cobb's Lawn & Landscape		No Response
Cody Vaughan Electric LLC		No Response
Colbi Technologies, Inc		No Response
Coleman International Inc		No Response
Combs custom solutions (Jennifer combs)		No Response
Combustioneer Corporation		No Response
Comfort Systems USA (Southeast), Inc.		No Response
CommandTec, LLC (CommandTec)		No Response
Commercial Kitchen Parts & Service (Greenwich, Inc.)		No Response
Commercial Restoration Company		No Response
Complete Contract Consulting (Complete Contract Consulting)		No Response
Complete Supply Inc		No Bid
Concept Facility Services		No Response
Concrete Leveling Technologies (Holiday Roofing LLC)		No Response
Conklin Office Services, Inc. (Conklin Office Services, Inc.)		No Response
ConstructConnect		Viewed
construction 95 llc		No Response
Construction bid source		No Response

Construction Journal		No Response
Construction Network, Inc		No Response
Containers On Demand LLC		Viewed
Contech Contractors Inc		No Response
CONTINENTAL HARDWARE INC (CONTINENTAL HARDWARE INC)		No Response
Cookeville Heating and Cooling Services LLC		No Response
Core by KHI Restoration (KHI Construction LLC)		No Response
Core Products Co, Inc. (Core Products Co, Inc.)		No Response
Correct Digital Displays, Inc.		No Response
Cotton's Electrical Contracting & Services, LLC (Cotton's Electrical Contracting & Services, LLC)		No Response
Covid Control Services LLC (Covid Control Services LLC)	Fail	No Response
Crawford Electric	Fail	No Response
Crescent Parts & Equipment		No Response
Crestone Commercial Construction		No Response
Criterion Management Services, LLC		No Response
Cross R's Company LLC		No Response
Crown Jewel Cleaning, LLC		No Response
Crystal Facility Solutions Inc		No Response
CS FENCE LLC		No Response
CUE Construction Services, LLC		No Response
Culligan of Omaha (Wichita Water Conditioning Inc)		No Response
Cummings Electrical (Cummings Electrical)		No Bid
Custom Cutters		No Response
D & H Quality Construction		No Response
D Gillette Industrial Services Inc		No Response
D&L Inc.		No Response
D&T Carpet Service LLC		No Response
DAISY I.T. SUPPLIES, SALES & SERVICE (DAISY WHEEL RIBBON CO. INC)		No Response
Dallas JMB Properties		Viewed
DataSpan Holdings Inc.		No Response
Daystar Services. (Daystar Cleaning Services, LLC)		No Response

DEAN BOILER INC.	No Response
Decco Contractors-Paving, Inc.	No Response
Decoulant Inc	No Response
DeHart Air Conditioning and Electronics Inc.	No Response
Del Mar College APEX Accelerator	No Response
Delaneys Restoration Inc.	No Response
DELTA GRASSMASTERS, LLC (DELTA GRASSMASTERS, LLC)	No Response
Delta innovative services (Delta innovative services)	No Response
Delta Office Products (Goosa Distributing Inc)	No Response
Denney Electric and Construction	No Response
Derrick Construction Company, (Derrick Construction Company,)	No Response
Desert Business Interiors, LLC	No Response
DevCare Solutions Ltd	Viewed
DGR United	No Response
Diamondback Landscaping & Lawn Care, Inc.	No Response
Direct Expansion Solutions	No Response
Direct Solutions (Direct Solutions)	No Response
Discount Telecommunications, Inc d/b/a Discount Telecom (Discount Telecom)	Viewed
DisinfectCARE (Global Disinfection Group, LLC)	No Response
DITTA ENTERPRISES LLC	No Response
dlb Consultants LLC (D. Bivens Consulting LLC)	No Response
DNA Plumbing Services, LLC	Viewed
D-N-D Services Inc	No Response
DOC Development Inc	No Response
Doho Weight Loss Clinic LLC (Doho Weight Loss Clinic LLC)	Viewed
Dominate the Hardwood Enterprises	No Response
Dominion Due Diligence Group, Inc. (Dominion Environmental Group, Inc.)	No Response
Don R Williams Remodeling & Construction	No Response
Doral Digital Reprographics Corp	No Response
Dorsey's Heating & A/C (Richard T Dorsey)	No Response
Double A Plus Engineering, LLC	No Response
Dougan Environmental Control Inc.	No Response

Down To Earth Services, Inc.		No Response
DRAIN RIGHT PLUMBING LLC		No Response
Dreamwalls (Gardner Glass Products)		No Response
Drive Auto Collision		No Response
Dunhill Construction		Viewed
Duran Concrete Services LLC		No Response
DVO-USA INC.		No Response
DWR Solutions		No Response
DYCHE Industrial Services LLC		No Response
Dynamic Contracts Consultants LLC (Memon)		No Response
Dynamic Fabrication Solutions LLC		No Response
Dynamic Logistics & Administrative Services LLC		No Response
Dynamic Preparedness Services		No Response
Dynamic Systems Inc		No Response
E1 Energy Saving Technology (Eagle First, Inc.)		No Response
E9 Construction LLC		No Response
EAST TEXAS AUTO AIR & GLASS (Schaetz Enterprises Inc.)		No Response
EAST TEXAS PROFESSIONAL CLEANING SERVICES		No Response
East Texas signs (Gerbine, Inc)		No Response
East Texas Sports Field Maintenance		No Response
EcoLite Holdings, LLC		No Response
EcoSmart (Dwight Eaton)	Fail	No Response
EDF GROUP		No Response
Ed's Supply Company		No Response
eduPARTS, LLC		No Response
Efficient Facilities International		No Response
EGA Construction Services LLC		No Response
EGR Water Well Service		No Response
Elevated Technologies Inc.		No Response
Elevator Control Service (Elcon Enterprises, Inc.)		No Response
Elevator Solutions Inc		Unsubmitted
Elevator Technologies Inc. (Myles)		No Response

Elevator Transportation Services, Inc. (Elevator Transportation Services)		No Response
Elevators of Beaumont (Stark Business Ventures L.L.C.)		No Response
Elias Squeaky Cleaning LLC		No Response
Elite Carpet & Matting Company, Inc.		No Response
ElstonAire, Inc.		No Response
EMCOR Services Fagan (EMCOR Services Fagan)		No Response
Emerson Fence Company		No Response
EMR Elevator, Inc.		No Response
Encompass Contractors North America		No Response
Energy Hunters		No Response
Energy Mechanical Services		No Response
Ener-Tel Services I, LLC		No Response
Entech Sales and Service		No Response
Environmental Consulting Group, Inc.		No Response
ePlus Technology, inc.		No Response
EPS LOGIX, INC. (EPS) (EPS LOGIX, INC.)		Viewed
ERC ENVIRONMENTAL and CONSTRUCTION SERVICES INC (ERC ENVIRONMENTAL & CONSTRUCTION SERVICES INC)		No Response
Erlys Janitorial Services		No Response
Essendant		No Response
Essential Constructs, LLC		Submitted
Estimators Corp (Estimators Corp)	Fail	No Response
EverLine Coating and Services (AJ Fourus Corp)		No Response
EverLine Coatings and Services of North Dallas (RBx2 Enterprises, LLC)		No Response
EVERVISTA LLC (EVERVISTA LLC)		No Response
Everything Yard, Inc. (Everything Yard, Inc.)		No Response
Exclusive Floors & Interiors		No Response
Executone of Louisiana (EXECUTONE OF CENTRAL LOUISIANA INC)		No Response
Exergenics USA, Inc.		No Response
Exoteriors LLC		No Response
Exterior Materials LLC		No Response
Extreme Exteriors Garden Center, LLC		No Response
Ez Systems (Ez Systems)		No Response

F&T Valley Motor Sports LLC		No Response
F.H. Paschen (F.H.Paschen, SNNielsen & Associates LLC)		No Response
FaceKey Corporation		No Response
Facilitex LLC		No Response
Facilities Management eXpress - FMX (Facilities Management eXpress)		No Response
Facilities Management Services, pbc.		No Response
FacilitiesCONNECT		Submitted
Facility Armor LLC		No Response
Facility Assessment and Consulting Team		No Response
FacilityONE Technologies, LLC.		No Response
Family Business Properties LLC		No Response
Fast Eddie's		No Response
Fastsigns College Station (KB & KB Enterprises)		No Response
FDG Construction (Faith Developers Group Inc)		No Response
FED Corporation		No Response
Federal One Supplies LLC (Federal One Supplies LLC)		No Response
FEDERAL PROTECTION, INC.		No Response
Fedpoint Systems LLC (Fedpoint Systems LLC)	Fail	No Response
Felix Auto Parts		No Response
Fence Concepts LLC		No Response
Fence Solutions Corp		No Response
Fercam Group (Ferkam Management Corporation)		No Response
Fidelis Networks, LLC		No Response
Fidis Logistics, LLC		No Response
Field Dots, LLC (Field Dots, LLC)		No Response
Fire King		No Response
Fitz Associates LLC		No Response
Fletch Window Tint (Fletch Window Tint)		No Response
FlexPro Surfacing LLC		No Response
Flood Out Restoration		No Response
Floortex USA LLC		No Response
Flores and Associates, LLC (Flores and Associates, LLC)		No Response

Flow Therapy Services LLC		No Response
FloWater, Inc. (FloWater/RTM Conference Attendee)		No Response
Forbo Flooring Systems		No Response
Foresight Services		No Response
Forever Fencing		No Response
Forrest City Plumbing, Inc		No Response
Fort Bend Services, Inc. (Fort Bend Services, Inc.)	Fail	No Response
FORTCON, INC		No Response
Fortress Elevator, LLC		Submitted
Frank A. Rogers & Co.		No Response
Frasier-Ousley Construction and Engineering, Inc.		No Response
FreeDoc (Frix Technologies)		No Response
Freemann Project Management Services LLC		No Response
FRESH START FACILITY SERVICES, INC.		No Response
FridgeWize		No Response
FTW Safety and Industrial Supplies, LLC		No Response
Fuerza Construction, LLC		No Response
Fujitec America Inc.		No Response
Futra-Vest Construction, LLC		No Response
FX Pro Construction (Full Axis, LLC)		No Response
G & T PAVING, LLC		No Response
GAR Construction		No Response
Garratt Callahan Co.		Viewed
Garret Shields (Garret Shields)		No Response
Gates Flag and Banner		No Response
GBPDIRECT (dean)		No Response
GC Services Maintenance and Janitorial (Colombican LLC)		No Response
GCC Enterprises Inc (Sully)		No Response
GD Resources LLC (GD Resources LLC)		No Response
General Commercial Solutions, LLC		No Response
General Sales of VA		No Response
GeoBasket LLC	Fail	No Response

Georgia Golf Construction (Georgia Golf Construction)		No Response
germrip, LLC (germrip, LLC)		No Response
GFE BUCKINGHAM LLC		No Response
GHD Advisory		No Response
Gill Digital Services, LLC		No Response
GK Contractors	Warn	No Response
Gleam Team Window Cleaning (Gleam Team USA LLC)		No Response
GLK Turf Solutions		No Response
Global Earth Products, LLC (BISD)		No Response
Global Force USA		No Response
Global Fuel Recovery		No Response
Global Garage Flooring of the Northeast LLC		No Response
GM Hill Engineering Inc		No Response
GM Roofing & Property Services (GAMCO llc)		No Response
Go To Services Inc		No Response
Gold Eagle Co		No Response
Golden Facilitation Enterprise LLC		No Response
Gordon Enterprise Group		No Response
GP Craft Inc		No Response
GP Plumbing (Byrom Enterprises LLC)		No Response
Graham Plumbing Inc		No Response
Grand River Maintenance and Services LLC		No Response
Grassworks Inc (Grassworks Landscape and Design Inc)		No Response
Gray's Construction, LLC		No Response
Graystone Concrete Solutions		No Response
Great Lakes Kwik Space		No Response
Green Seasons Landscaping		No Response
Greenhouse Electrical Professionals		Viewed
Greenscape Pump Services, Inc. (Greenscape Pump Services, Inc.)		No Response
Greenway Service, LLC		No Response
Grinning Bull, LLC dba Orkin Pest Control		No Response
Groves Industrial Supply		No Response

GSS, GLOBAL SUPPLY & SERVICE INC.		No Response
Guest Supply LLC (Sysco Guest Supply, LLC)		No Response
Guido Construction Company, Inc.		No Response
Guyton Industries, LLC		No Response
H&B Industries Inc.		No Response
H&H Exterior Cleaning Solutions		No Response
Hantho Outdoor Services		No Response
Har-Con Mechanical, LLC		No Bid
Hargis Electric		No Response
Harrison and Frances Medical Supplies	Fail	No Response
Harrison Glass LLC		No Response
Harrison Walker and Harper		No Response
Hart Contractor's of Texas, LLC		No Response
Hartson Total Opening Inc.		No Response
Hauling Ace Dispatching LLC		No Response
Hawkins Drywall		No Response
HBI OFFICE SOLUTIONS,INC. (HBI OFFICE SOLUTIONS,INC.)		No Response
HC Nye Company		No Response
Healthy School Supply, LLC		No Response
Heartland Sports Turf		No Response
Hearts and Family Foundation		No Response
HECMIS LLC dba Harper Electric CIMS (HARPER ELECTRIC)		Viewed
Helping Hands Services (Darshunda Osioh)		No Response
HEMPSULATION LLC		No Response
Henson's Greater TN Flooring (Henson & Associates Flooring)		Viewed
Henthorn Commercial Construction		No Response
Hepacart, Inc.		No Response
Herbert Heating & Air Conditioning Co., LLC		No Response
Hercules Relocation LLC		No Response
Herries Consulting		No Response
HES Facilities Management		No Response
HGI Facility Management (HGI, LLC)		No Response

High Access Solutions (High Access Solutions)		No Response
HigherGov (GovAlpha Inc)		No Response
Hill Country Tractor, LLC		No Response
Hill Manufacturing Company, Inc		No Response
Hillstone corporation		No Response
HIREARC LLC (HireArc LLC)		Viewed
His -N- Hers Handy Services LLC		No Response
HiTouch Business Services, LLC		No Response
Holloway Construction Company Incorporated		No Response
Hoopoe labs Inc		No Response
Hopson Project Services	Fail	No Response
Hou-Scape		Viewed
House of Mary Lou Home Care Solutions LLC		No Response
Houston Security film LLC (Houston Security film LLC)		No Response
Hovis Construction LLC.		No Response
Humble Elevator Service, Inc. (Humble Elevator Service, Inc.)		No Response
Hunt and Associates Inc.		No Response
Huseman Builders, Inc.		No Response
HWC Systems (H7W Cleaning Systems, Inc.)		No Response
Hygenics	Fail	No Response
IA Quality		No Response
IBEX Builds (Adam Bolton Construction & Consultation LLC)		No Response
ICD Builders Incorporated (ICD Builders Incorporated)		No Response
Identity Group Holdings		No Response
IDG Services, Inc		No Response
IGIW Sales & Edu		No Response
Imelda's Cleaning Service, LLC		No Response
Imperial Supplies		No Response
Inframark, LLC		No Response
Infrastructure Innovations, LLC	Fail	No Response
Inland Potable Services (Inland Potable Services)		No Response
Innovative Health & Safety Training Institute (Innovative Health & Safety Traini ng Institute)		No Response

Innovative Hybrid Resources LLC		No Response
InProduction Inc (InProduction Inc)		No Response
Insight Global		No Response
Integral AV Solutions (Integral AV Solutions)		No Response
Integrated Industries, LLC		No Response
Integrity Communication Technologies		No Response
Integrity Performance Group (Integrity Performance Group)		No Response
Integrity Pipeline Services		No Response
IntegriWard LLC		No Response
Intellific LLC	Fail	No Response
International Construction		No Response
International Consulting Unlt'd (KNS Industrial Supply)		No Response
Interplay Learning		No Response
IPC Eagle Corporation (IPC Eagle Corporation)		No Response
IT Vision Networks Inc		No Response
Itty Bitty Spider		No Response
IVMsolutions		No Response
Izy freights logistics		No Response
J B Warranties		No Response
J.M. Martin Custom Homes Inc.		No Response
Jack Rabbit Off-Road (JRO, LLC)		No Response
JACKarse Rentals		No Response
Jackrabbit Manufacturing		No Response
Jani-King of Memphis (River City Franchising LLC)		No Response
Jan-Worx		No Response
Jazzy Js LLC (https://jazzyjs.biz/)		No Response
JBI Distributors (JBI Distributors)		No Response
JC Elite Structures, LLC		No Response
JCS INDUSTRIES, INC		No Response
JD Distributors, Inc.		No Response
JDC Energy Resource, LLC		No Response
JennRand Diversified, L.L.C. (JennRand Diversified, L.L.C.)		No Response

JLG Services LLC	No Response
JMA Resources, Inc	No Response
JNA General Construction (JNA General Construction)	No Response
John Lee Enterprise, LLC	No Response
John's Custom Fabrication & Welding	No Response
Johnson Construction Services, LLC	No Response
Jonathan's Painting	No Response
Jordan Supply	No Response
JOSSY GOOD NEWS COMPANY LLC	No Response
JPJ Construction (JPJ General Contractor, LLC)	No Response
K & M Elevator, LLC	No Bid
K&R Mechanical Services LLC	No Response
K2 SERVICES, LLC	No Response
Karcher North America (Alfred Karcher SE & Co. KG)	No Response
KAT Turf Services, LLC (KAT Turf Services, LLC)	No Response
Kearney Pro-Builders	No Response
Ken's Heating & Air Conditioning (Johnson Service Co. LLC)	No Response
Kent Automotive (Lawson Products, Inc)	No Response
Kertrina Dauway Sales Consulting	No Response
Kijero LLC	No Response
Kindle Fischer Specialty Products (Kindle Fischer Specialty Chemicals, LLC)	No Response
Kings III Emergency Communications (Kings III of America, LLC)	Viewed
Kircher Construction, Inc.	No Response
kiwi services inc	No Response
Kleenit Facility Management LLC	No Response
Kleen-Tech Services, LLC	No Response
Kranco Roofing	No Response
KT Black Services LLC	No Response
L&L Gym Equipment Services (LL Gym Equipment Services)	No Response
L.J. Early Co., Inc.	No Response
LABSOURCE INC	No Response
Lacys Welding LLC	No Response

LaDanCo LLC	No Response
Lady Liberty Group, LLC	No Response
Lakeland Little Rock (Lakeland Little Rock)	No Response
Land Rec	No Response
Lang Specialty Trailers (Lang Specialty Trailers)	No Response
Langhorst Construction, Inc (Amy Schueddig)	No Response
Lawless Communications Group	No Response
LawnFX	No Response
LCS Kleen-Aire (LCS Kleen-Aire)	No Response
LDD Sports Construction, LLC	No Response
Legacy Electric (Brosh Enterprises LLC)	No Response
Lerch Bates Inc.	No Response
LeVis Consulting Group, LLC	No Response
Lighthouse Electrical Contractors	Viewed
Lights by Sparky Inc	No Response
Lindenmeyr	No Response
Linerz Inserts LLC	No Response
Lionheart Solutions	No Response
Locke Construction Services, LLC	No Response
Locus Diagnostics LLC (Locus Diagnostics LLC)	Viewed
Logistical Maintenance	No Response
Lone Star Boilers, LLC (Lone Star Boilers, LLC)	No Response
Lonestar dirt work and construction LLC (Stangle)	No Response
Lonestar Electric Supply (Lonestar Electric Supply)	No Response
Longview Occupational Medicine Clinic (Longview Medical Center, LP)	Viewed
Lous Cajun Creole	No Response
Loyd Excavation and Construction LLC	No Response
LPS GREEN TECHNOLOGIES (LPS GREEN TECHNOLOGIES)	No Response
LRMB Group , LLC (LRMB Group , LLC)	No Response
LSPS Solutions, LLC	No Response
L-Sync, LLC	No Response
LubeMatrix, Inc.	No Response

Lucid Concepts LLC	No Response
Lumalier (Lumalier)	No Response
Luna & Associates (Luna & Associates)	No Response
Luomu LLC	No Response
M&H Solutions LLC	No Response
M&M Micro Systems Inc.	No Response
M&P Roofing LLC	No Response
M/C ELECTRIC COMPANY INC	No Response
M2 Federal Inc (M2 Federal Inc)	Viewed
M3 Supplies & Services LLC	No Response
Madison Contracting LLC	No Response
Madison Sport Floors (Madison Finishing LLC)	No Response
Magic Turf	No Response
Magid Glove & Safety Mfg. Co.	No Response
Majestic Services, Inc.	No Response
MAKINA TROCAS	Viewed
Mako Industries (Mako Oilfield Services DBA Mako Industries)	No Response
Malek Inc	No Response
MANS DISTRIBUTORS	No Response
Marcorp Group LLC (Marcorp LLC)	No Response
Marksmen General Contractors, LLC	No Response
Marshal Stuff Inc (Terry Hambley)	No Response
Martin Mechanical	No Response
Matthis Construction Company Inc	No Response
MAXA Elevator Solutions LLC (MAXA Elevator Solutions, LLC)	Unsubmitted
MAXARI	No Response
Maximilian Vasquez LLC	No Response
Maxpro Enterprise	No Response
Mc & Sons Construction - Roofing (Mc & Sons Construction - Roofing)	No Response
MC Cleaning Services of Miami Inc	No Response
MC Global Management Consultants	No Response
Mccrary's Mow Time	No Response

McCure Company (McCure Company)	No Response
MCES Industries, LLC (MCES Industries, LLC)	No Response
McFadden's Lock And Key	No Response
McFly Pressure Washing (McFly Pressure Washing, LLC)	No Response
McKinney Office Supply (McKinney Office Supply)	No Response
McLarty Ford (THTS, Inc)	No Response
Mechanical Concepts	No Response
Mechanical Materials, LLC	Submitted
Mechanical Partners Inc.	No Response
Med Solutions LLC	No Response
MEDRX COMPOUNDING & PHARMACY (MEDRX COMPOUNDING & PH ARMACY LLC)	No Response
Medshield International Corporation (Medshield International Corporation)	No Response
Megahertz Technology (Megahertz Technology, Inc.)	No Response
Mersi Distribution	No Response
Metal Roof Coating LLC	No Response
Meteor Midstream Services (Taje and Co, LLC)	No Response
Metro Elevator Central Texas, Inc.	No Response
Metro Elevator DFW, Inc.	No Response
Metro Elevator Houston, Inc (Metro Elevator Houston, Inc)	No Response
Metro Elevator Waco, Inc.	No Response
Metro Pure Water LLC	No Response
Metroplex Welding Supply	No Response
Metropolitan Corp	No Response
Metro-Repro Inc (Metro-Repro Inc)	No Response
MG XTREME ELECTRONICS & ACCESSOIRES	No Response
Micro Plan Masonry, Inc.	No Response
Micro-blok Solutions	No Response
Mid American Research Chemical	No Response
Mid-Ark Security (Central Arkansas Security Systems, Inc.)	No Response
Midas Contractors LLC (Midas Contractors LLC)	No Response
Mid-States School Equipment (Mid-States School Equipment Co. Inc.)	No Response
Mid-Tex of Midland, Inc.	No Response

Midway Restaurant Supply	No Response
Midwest Audio Visual (Midwest Audio Visual)	No Response
Midwest Concrete Solutions	No Response
Midwest GMAX and Turf Maintenance	No Response
MightyGood Solutions	No Response
Mike Barnett Construction (M & S Barnett Construction, LTD)	No Response
Mikocorp LLC (Mikocorp LLC)	No Response
Millennial Business Solutions LLC (Millennial Business Solutions LLC)	No Response
Millennium (Kyle Enterprises LLC)	No Response
Miller Engineering Co. (Miller Engineering Co.)	No Response
MINDFORE INC (MINDFORE INC)	No Response
Minimise USA LLC	No Response
Minuteman Industrial Supply (Chris White)	No Response
Miracle Method Chicago NW Metro (Fred Haas & Associates INC.)	No Response
Miracle Recreation Equipment Company (Miracle Recreation Equipment Co mpany)	No Response
MITSTRIKE LLC	No Response
MJR EDUCATIONAL SUPPLIES	Viewed
ML Deer Construction Company (ML Deer)	No Response
Modern Business (Modern Business Equipment, Inc)	No Response
Modern Day Concrete Inc.	No Response
Modern Mechanical Services (Modern Mechanical Services)	No Response
Momentum Global Solutions, LLC	No Response
Monarch (Monarch Trucking LLC)	No Response
Monarch Specialties, LLC	No Response
Morgan Scott Construction Company (Morgan Scott Management Consultan ts)	No Response
Moser Engine Service, Inc.	No Response
Moser Roofing Solutions, LLC (Moser Roofing Solutions, LLC)	No Response
Motion Industries	No Response
Mount Vernon Pecan Company	No Response
Mountain Consulting, Inc. (Mountain Consulting, Inc.)	No Response
Mouton 3 Services LLC (Mouton 3 Servcies)	No Response

Mower Medic and Power Equipment (Woodvest LLC)	Fail	No Response
MRI Construction Inc		No Response
MSC Industrial Supply		No Response
MT Contracting		No Response
MTG Construction & Renovations LLC (MTG Construction & Renovations LLC)		No Response
MTM Services		No Response
Munoz Flooring Solutions		No Response
My Medical (Aviationy LLC)	Fail	No Response
Myron McDowell Construction LLC		No Response
N&H Contractors LLC		No Response
N.E. Texas Roof System, LLC		No Response
NAISS (NAISS)		No Response
Nance International		No Response
Nash Window Tint		No Response
Nassau Trading Inc.		No Response
National Contract Flooring		No Response
National Elevator Inspection Services, Inc. (National Elevator Inspection Services, Inc.)		No Response
National Roofing Partners (RL National Roofing Partners, LLC)		No Response
Native American Contracting & Supply, LLC (Native American Contracting & Supply, LLC)		No Response
Naturally Purposed		No Response
NDH Service LLC		No Response
Neal Johnson LLC		No Response
Nelson Elevator, LLC.		No Response
NewGold, LLC		No Response
Newman Regency Group		No Response
NexRev (NexRev, LLC)		No Response
Nexus		No Response
Nexus AI (Courseflow)		Viewed
Nichols Development Group LLC		No Response
Nicks test		No Response
Nightlock (Taylor Brothers Door Lock, LLC)		No Response

Niyam Construction (Niyam LLC)	No Response
NoGapsHere Health Solutions, Inc. (NoGapsHere Health Solutions, Inc.)	No Response
Noria Corporation	No Response
North Coast Studios, Inc.	No Response
North Texas 101 Mobility LLC (101 Mobility)	No Response
Northeast Texas Plumbing, LLC	No Response
Northwest Center	No Response
Norton Facility Maintenance	No Response
Novotx LLC	Viewed
Numunu Staffing, LLC. (Numunu Staffing, LLC.)	No Response
Nuvar Inc. - Pivotables Inc. - Goldie Products (Nuvar Inc.)	No Response
Nuwave Holdings LLC	No Response
NYX, INC.	No Response
Office Products Alliance (K&M OFFICE PRODUCTS, INC.)	No Response
Office Source (Office Source)	No Response
OHEIL SITE SOLUTIONS (OHIO IRRIGATION LAWN SPRINKLER SYSTEM S INC.)	No Response
OJ's Janitorial & Sweeping Service, LLC	No Response
O'Krent Floors	No Response
Oldham Welding (Chris Oldham Welding)	No Response
Olsson Roofing Company, Inc. (Olsson Roofing Company, Inc.)	No Response
Omni Energy Partners	No Response
On the Go Janitorial Services	No Response
One World MFG LLC (One World MFG LLC)	No Response
Opamp Information Management, LLC (Opamp Information Management, L LC)	No Response
Operational Professional Services LLC	No Response
OPTICAL DISTRICT	No Response
Option 1 Logistics (TFAM Solutions LLC)	No Response
Oracle Elevator	No Response
Oracle Elevator Co.	No Response
osyosy business llc	No Response
Otis Elevator Company	No Response

Otsego Outdoor Power (Riverside Outdoor Power LLC)		No Response
Outdoorsiness		No Response
Outfitters Construction LLC	Fail	No Response
Outlook Turf (Outlook Turf Manufacturing)		No Response
Overhead Door Inc.		No Response
P&P Roofing/Construction		No Response
P3S Corporation		No Response
Pace Construction Services LLC (Pace Construction Services LLC)		No Response
PacificWest Energy Solutions, Inc.		No Response
Paige Management LLC		No Response
Paint Boss GA (Paint Boss GA)		No Response
Palmer Conservation Consulting (PALMER CONSERVATION CONSULTIN G, LLC)		No Response
Pannell Industries Inc		No Response
Paradigm Masters Management		No Response
Paris Glass & Mirror (Gillie Company LLC dba Paris Glass & Mirror)		No Response
Park Supply Company, Inc.		No Response
Parrish Hare		No Response
Patriot Fence (Patriot Fence)		No Response
PATTERSON PEST PATROL LLC		No Response
Pavement Resources Inc		No Response
PDV Associates, Inc		No Response
Pecos Construction and Fencing, LLC		No Response
Pelco Builders, Inc.		No Response
Pera Inc.		No Response
Personnel Services Development	Fail	No Response
Pest Management, Inc		No Response
Pet and Playground (Hercules Poly)		No Response
Phoenix Contractors, LLC		No Response
Phoenixx Solutions LLC (US)		No Response
Phone and Pad Warehouse (iphone and ipad warehouse)		No Response
PIATRA INC.		No Response
Pick-it Construction		No Response

Pinnale Network Solutions (Pinnale Network Solutions)		No Response
Plastic Connections, Inc. (Plastic Connections, Inc.)		No Response
Platinum General Contracting & Land Development LLC (Platinum General Contracting & Land Development LLC)		No Response
Platinum Striping and Sealcoating, LLC		No Response
PLM Spraying LLC		No Response
Polaris Services, LLC		No Response
Polyguard Products		No Response
Poston & Associates		No Response
PowerPlay Cleaning		No Response
Precision Control Systems, Inc. (Precision Control Systems, Inc.)		No Response
Precision Roofing Inc		No Response
Premier Sign Systems, LLC		No Response
PREMIER SOLUTION'S GROUP (PREMIER DISPATCH & LOGISTICS LLC)		No Response
Pressure Werx, LLC	Fail	No Response
Prestige Elevator Services		No Response
Preston Design & Construction Consulting		Viewed
Prèvoyance Solutions, LLC		No Response
Prime Time Companies, PC		No Response
Priority-1, Inc.		No Response
Prism Electric Inc		Viewed
Prodigy Building Solutions, LLC		No Response
Professional Choice Fire and Security Systems (PCFSS LLC)		No Response
Professional Pavement Services, LLC (Professional Pavement Services, LL C)		Viewed
Professional Roofing Contractors, Inc. (Professional Roofing Contractors, In c.)		No Response
Professional Tree Care Group LLC		No Response
Projects by Design LLC		No Response
ProMed Medical Solutions (Pro Med Medical Solutions, LLC.)		No Response
Property Works (Property Works)		No Response
Proposalhelper, LLC (Proposalhelper, LLC)		No Response
Protecall LLC		No Response

PSG ENERGY SERVICES LLC		No Response
Puradigm Mid-America (TradeMark Environmental Technologies LLC)		No Response
PureUV, LLC		No Response
PureWay Compliance		No Response
PuroClean of Southlake (Southlake Restoration Holdings, Inc.)		Viewed
Purvis Industries LLC		No Bid
Push Pedal Pull		No Response
Putnam Fire and Security, LLC.		No Response
PWXPress (PWXPress)		No Response
QCS Professional Cleaning Service (Quality Cleaning Systems LLC)	Fail	No Response
QikTurf		No Response
Quality Plumbing, Inc.		No Response
Quantum Medical (Graduate Plastics Inc)		No Response
Quick Stripe Paving, Inc.		No Response
Quicklert Inc.		No Response
Quinn & Co Designers		No Response
QYK BRANDS LLC (QYK BRANDS LLC)		No Response
R&B Roofing LLC (R&B Roofing LLC)		No Response
R&R Controls		No Response
R.C. Wegman Construction Company (Rozanski)		No Response
R.J. Carroll CO.		No Response
R3 ROBOTICS, LLC	Fail	No Response
Rack Em Up Construction		No Response
Rave Energy (TZMedia LLC)		No Response
Raven Mechanical, LP		No Response
RazorClean Building Services Inc.		No Response
RB Doors and Hardware Inc		No Response
RC4Vets	Fail	No Response
RCJ Roofing & Construction (Rene Cerda Jr Roofing & Construction)		No Response
RE Global (Residential Enhancements, Inc.)		No Response
Real Estate Services, LLC (A Plus Real Estate Services, LLC)		No Response
Reconstruction Experts Inc		No Response

Red Ball Oxygen		No Response
Red Hill Supply (Red Hill Ventures, LLC)		No Response
Reddz Global Logistics, LLC		No Response
Reep's Air & Refrigeration LLC	Fail	No Response
Reese air services matt		No Response
Regency Enterprises Services LLC		No Response
Regency Staffing		No Response
Regional Construction Services LLC (Regional Construction Services LLC)		No Response
Reliant Elevator Inspections & Consulting (Reliant Elevators, LLC)		No Response
REMS-AV, LLC		Viewed
Rendon Industry Solutions, LLC		No Response
Renegade Construction LLC (Renegade Construction LLC)		No Response
Renowned Chemical Solutions, LLC		No Response
Rescue Heating & Air, LLC		No Response
Restoration nation inc		No Response
Revenue Arm (Cole Sells Well)		No Response
RevoTRAC, LLC		No Response
Reynolds Electric Heating and Air Conditioning Service, LLC (Reynolds Electric Heating and Air Conditioning Service, LLC)		No Response
RFPGurus (RFPGurus)		No Response
RGL Construction LLC		No Response
RGV GUARDIAN ENTERPRISES, LLC		No Response
Rhino Health inc	Fail	No Response
Richard D. Smith and Sons, Inc		No Response
Rider Construction Group, LLC		No Response
Ridgecore Solutions, LLC (Ridgecore Solutions, LLC)		No Response
Right A Way Transports and Logistics		No Response
Rio Elevator Company, Inc.		Submitted
Rio United Builders, LLC		No Response
Ritz Safety (Ritz Safety)		No Response
RKI, INC. (RKI, Inc.)		No Response
Roadrunner Traffic Signs LLC		No Response
Robert Madden industries		No Response

Roberts Asphalt Sealing & Striping (Roberts Asphalt Sealing & Striping)		No Response
Rocky Mountain Power Generation (Rocky Mountain Power Generatio)	Fail	No Response
Rodriguez Welding & Construction		No Response
Roger Woods Electric (Roger Woods Electric)		No Response
Ronald D Hicks		No Response
Roof Spec Solutions LLC		No Response
Roofing Solutions Group, Inc.		No Bid
Royal Media Network Inc (Royal Imaging Solutions)		No Response
RPB ROOFING & CONSTRUCTION		No Bid
RPM Auto Auction (RPM Auto Auction)		No Response
RR MULTISERVICES LLC		No Response
RR Multiservices LLC		No Response
RS DEMOS & PILINGS LLC		No Response
RT Solutuions Group		No Response
rtg fleet service llc		Viewed
Rushing2Winders LLC (Rushing2Winders LLC)		No Response
S D Williams Investments		No Response
S E C Contracting Inc. (Smith's Epoxy Coatings)		No Response
S&M Cleaning Services (Shawn Nichols)		No Response
S2 services		No Response
S4th Power Group		No Response
SafeRack LLC (Thompson)		No Response
SAFETY EDUCATION RESEARCH GROUP, LLC.		No Response
Safety Film USA (Flip Lok LLC)		No Response
SafetyNet America (Safety Net, LLC)		No Response
Salazar Remodeling LLC		No Response
SAM TELL & SON INC.		No Response
Sanalife (InTech Energy, Inc.)		No Response
Sanalife Wellness		No Response
Sanford Federal, Inc.		No Response
Sawmill Specialties (Satterwhite Companies, Inc.)		No Response
Sawyer Services		No Response

SBC WASTE SOLUTIONS INC	Fail	No Response
Scaravalle Services, Inc. (Scaravalle Services, Inc.)		No Response
Schindler Elevator (Schindler Elevator)		No Response
Schumacher Construction Services LLC		No Response
Schumacher Elevator Company		No Response
SCM Consultants Inc.		No Response
SDR Facility Solutions (Marilyn R Seeley)		No Response
SEC, Snellstrom Electrical Contracting (David M Snellstrom)		No Response
Security101 (Ford Industries Inc)		No Response
Selco Seating and Courts LLC (Selco Seating and Courts LLC)		No Response
Select Commercial Services LLC		No Response
Selective Micro technologies		No Response
SEMCO LLC		No Response
Service Logic & Controls, LLC		Viewed
Service Master Services (BSRK INC)		No Response
Service Squad,Inc. (Service Squad,Inc.)		No Response
ServiceMaster of Seattle (ServiceMaster Recovery Management of Seattle)		No Response
ServiceMaster Recovery Management (SRM) (DSI Holdings Corporation)		Viewed
SERVPRO of Central Union County (SERVPRO of Central Union County)		No Response
SERVPRO of Cumberland, Morgan & White Counties (Priority Restoration)		No Response
Servpro of Dunedin/ Palm Harbor South (Royal Restoration LLC)		No Response
SERVPRO of Fernandina Beach/Jacksonville NE (SERVPRO of Fernandin a Beach/Jacksonville NE)		No Response
SERVPRO of Marshall, Sedalia, Columbia (Icc, LLC)		No Response
Servpro of Northeast Collin County (A & E Services, LLC)		No Response
SERVPRO Of Southern Trumbull County (Dobson Family Partnership LLC)		No Response
Servpro of Wichita Falls (Servpro)		No Response
SETEX Facilities & Maintenance, LLC		No Response
Shamrock Roofing & Construction (Shamrock Roofing & Construction)		No Response
SHEET METAL CONTRACTORS INC		No Response
Shelby Distributions		No Response
Sign Solutions of East Atlanta, LLC		No Response
Signature Advisory Partners		No Response

Signature Roofing And Coatings (Signature Roofing And Coatings)		No Response
Signetcbyer LLC (Jackson)		No Response
Simply Commercial LLC		No Response
SITE AND FIELD ENTERPRISES LLC		No Response
SITEX Environmental LLC		No Response
SKEETER KELL SPORTING GOODS		No Response
SKICK CONCEPTS INC. (SKICK CONCEPTS INC.)		No Response
SKILLED CONSTRUCTION SUBS UNLIMITED		No Response
Skilled Services Quality Construction LLC (Skilled Services Quality Construction LLC)		No Response
Skypine Roofing (Four Reserves llc)		No Response
Skytec Elevator, LLC (Skytec Elevator, LLC)		No Response
SLG Lighting (Spring Lighting Group, Inc)		No Response
Sloan’s technology		No Response
Smallwood Lock & Supply (Smallwood Lock & Supply)		No Response
Smart Rain LLC		No Response
Smith Construction Group, LLC. (Smith Construction Group, LLC.)		No Response
SMITTY ECOMMERCE LLC		No Response
SMTA ENTERPRISES INC	Fail	No Response
SNR Construction & Consulting LLC		No Response
Solid Natural Solutions (Ni's Naturals LLC)		No Response
SolutionsAe, Inc.		No Response
Sorb•ables (Sorbables)		No Response
Soulard Technology (Soulard Technology)		No Response
South Texas Boiler Industries, LLC (South Texas Boiler Industries, LLC)		No Response
South Texas Horticulture (South Texas Horticulture)		No Response
SouthCo Commercial		No Response
SOUTHERN BROTHERS PROPERTIES LL		No Response
Southern Management Services / HES Facilities		No Response
Southlake Group LLC		No Response
Southwest Solutions (Thurston, Owens & Newman, LLC.)		No Response
Sparks Services		No Response
Spartan Surfaces, Inc.		No Response

SpawGlass Construction Corp. (SpawGlass Construction Corp.)		No Response
SpawGlass Contractors, Inc.		Viewed
Spheronomics		No Response
Splash Power Washing (Splash Power Washing)		No Response
Sports Floors Inc. (The Davis Robinson Group Inc.)		No Response
SSC Signs & Lighting		No Response
Staat Inc.		No Response
StallStash (Bansaw Industries, LLC)		No Response
Stamar Packaging, Inc. (Stamar Packaging, Inc.)		No Response
Stanfran Transport (A1 Mobil Fleet Wash & Detail Service Inc.)		No Response
Stansell Services		No Response
Stars Media Group		No Response
Stephens Painting, Inc		No Response
Sterling Services of Texas LLC		No Response
Sterling Temporary Staffing, LLC (Sterling Temporary Staffing, LLC)		No Response
Stewart Builders, LLC		No Response
Stewart Signs (Redmont Signs)	Fail	No Response
Storer Services, LTD		Viewed
Strategic Consulting Alliances, LLC (Strategic Consulting Alliances, LLC)		No Response
Sullivan Contracting Services (Pounds Group LLC)		No Response
SUNBELT SUPPLY LLC (SUNBELT SUPPLY LLC)		No Response
SUNTRONICS LED INC		No Response
Superior Broadband Services		No Response
Superior Commercial Cleaning (Superior Commercial Cleaning)		No Response
Superior Industrial Products		No Response
Superior Sealcoating Cleaning LLC		No Response
Superior Thermal Services, LLC (Superior Thermal Services, LLC)		Viewed
SUPPLY SIDE USA (SUPPLY SIDE USA)		No Response
Supplyitall		No Response
Supreme Construction & Maintenance (Adela Mendez)		Viewed
Sustainability Management Partners, LLC (Sustainability Management Partners, LLC)		No Response
SUSTAINABLE FACILITES MANAGEMENT		No Response

Swain Enterprises LLC (Robert Swain)	No Response
Swat Contracting LLC	No Response
SwētSPOT LLC	No Response
Swift Sensors	No Response
Swinerton (Swinerton Builders)	No Response
Swordsmen Roofing & Construction, LLC (Swordsmen Roofing & Constructi on, LLC)	Viewed
Synergy Custom Fixtures	No Response
Synergy Development & Construction, LLC (Synergy Development & Constr uction, LLC)	No Response
Synergy Healthcare LLC	No Response
Sysco Guest Supply (Guest Supply)	No Response
Talarai LLC	No Response
Talon Commercial Services	No Response
Tamburro Interiors, LLC (Tamburro Interiors, LLC)	No Response
Tampon Tribe, Inc. (Tampon Tribe, Inc.)	No Response
Taproot Solutions Inc (Taproot Solutions Inc)	No Response
Taylor Company, DBA TRUCOM, DBA TREIN Management (Matthew Taylor)	No Response
TBI Solutions, LLC	No Response
TDC Waterproofing & Restoratio	No Response
Team Mechanical of Texas, LLC	No Response
Team North Texas (Akrongoniaios, Inc.)	Viewed
Tech Electronics, Inc	No Response
Tejas Elevator Co	No Response
Tejas Office Supplies	No Response
Tekton Development Inc.	No Response
Teltech Communications LLC	No Response
Tenacity Marketing Group	No Response
Ter-Jan Company	No Response
Tessera Technology Group	No Response
Teters Faucet Parts Corporation	No Response
Texas Eagle Solutions LLC (Texas Eagle Solutions LLC)	No Response
Texas Hub Biz (Texas Hub Biz)	No Response

Texas Paint & Wallpaper Co. (Helm Paint & Supplies)	No Response
Texas Patriot Contracting LLC	No Response
Texas Power Equipment Inc.	No Response
Texas Resource Marketing LLC	No Response
Texas Timberjack Inc.	No Response
Texas Vets Roofing	No Response
Texas Yard Pro, Inc.	No Response
Tex-Gon Plumbing	Unsubmitted
The Ancient Bakers (Vision's Sown, An Ancient Baking Company, Inc.)	No Response
The Bid Calendar	No Response
The Bravery Company (Bravery Construction)	No Response
The Caxton Printers Ltd.	No Response
The Cecilia Global Group	Viewed
The Comfort King (Gideon Lynn LLC)	No Response
The CourtSmiths (Smith-Wheeler Inc.)	No Response
The DKP Group	No Response
The Experts in Slides	No Response
The Faulk Company	No Response
The H.A.B.I.T.S. Group (Zacharias Johnson)	No Response
The i-MAGE Corporation	No Response
The Karen Group, LLC	No Response
The Kings Midwest Division LLC	No Response
The Murphy Contracting Company (The Murphy Contracting Company)	No Response
The Planit Room	Viewed
The RhysIvy Company	No Response
The Safeguard System Inc. (The Safeguard System Inc.)	No Response
The Scarlette Group	No Response
The Severson Group	No Response
The Steam Team	Viewed
The Trade Group	No Response
Thermflo, Inc.	No Response
Thompson Safety, LLC	No Response

Threshold Brands		No Response
Thunder River Construction, LLC		No Response
Tidal Wave Wash Supply Inc.		No Response
TMA LASER GROUP, INC		No Response
TODAYS OFFICE INC NWA	Fail	No Response
Tom Ethen Enterprises (Tom Ethen Enterprises)		No Response
Tools Required, LLC		No Response
Total Energy Solutions (Total Energy Solutions)		No Response
Total Green Services		No Response
Total Lawn & Fence (Greg Goolsby Enterprises)		No Response
Trans Globe, LLC.		No Response
Transit Safety and Security Solutions		No Response
Transtelco/IP Matrix (Transtelco/IP Matrix)		No Response
Triangle (Triangle)		No Response
Tri-gen Construction LLC		No Response
Trigg General Construction, Inc	Fail	No Response
Triple-S Janitorial Supply (Third Gen LLC)		No Response
Troy Flooring Center (Troy Flooring Center)		No Response
Tru Matrix Contracting Services LLC		No Response
Tupallc		No Response
TUPELO MANAGEMENT LLC		No Response
Turner Roofing Services		No Response
TWG of America, Inc.		No Response
Two Way Direct		No Response
TXMC LLC		No Response
Tynes Property Management		No Response
U-C Holdings, Inc., (UNX-Christeyns, LLC)		No Response
Unalakleet Investments, LLC		No Response
United Construction (Dmd Elite LLC)		No Response
United Elevator Services		Submitted
United Manufacturing and Distribution LLC (United Manufacturing and Distribution LLC)		No Response
UNITED SAINTS PROTECTIVE SVS, LLC	Fail	No Response

Universal Fire Systems LLC	No Response
Universal Rental LLC	No Response
UPMLLC	No Response
Upper Arlington City Schools	No Response
Urban Elevator Service TX (Urban Elevator Service TX)	No Response
US Products, LLC.	No Response
UVC CDE Sanitation Services LLC (Uvc CDE Technology LLC)	No Response
Uweport LLC	No Response
Uzziel Services LLC (Uzziel Services LLC)	No Response
Valhalla Contracting (Red Rabbit LLC)	No Response
Valor Lift Elevators, LLC	Viewed
Valor Packaging Inc	No Response
Vantage Elite Logistics	No Response
Vaquero Truck and Trailer Parts (Long Shot Trucking Services LLC)	No Response
Vasco Sports Contractors (Vasco Asphalt Company)	No Response
Vecoplan	No Response
Ventured Sole LLC	No Response
Venus Supplies and Services, d.b.a. Total Facilities Solutions (Venus Supplies and Services)	No Response
vertex marketing	No Response
Vertical Events and Solutions Inc	No Response
VICTORIA COMMUNICATION SERVICES, INC	No Response
VIP Special Services LLC	No Response
virus solution	No Response
Vita Contractors LLC (Vita Construction LLC)	No Response
VTS Group Inc	No Response
VXI Global Solutions, LLC.	No Response
W & P, LLC	No Response
W&B Enterprises, LLC	No Response
W. W. Cannon (W. W. Cannon)	No Response
W.W. Grainger, Inc. (W.W. Grainger, Inc.)	No Response
Wagner Construction Services (Wagner Construction Services)	No Response
Washed New LLC	No Response

Washing Equipment of Texas		No Response
Waterman Construction		No Response
Watson Cleaning Services, Inc. (paula robertson)		No Response
Wayman and Company LLC DBA City Wide Facility Solutions - Wichita		No Response
WB Contracting Group,Inc.	Fail	No Response
Weathershield Roofing & Repairs (Weathershield Roofing & Repairs)		No Response
Wedge Supply (Imperial Bag & Paper Co LLC)		No Response
Weems Asphalt (Weems Asphalt)		No Response
Wellington Facility Services (CBMAA, Inc.)		No Response
Wells Truck and Trailer Repair		No Response
WENDINBOUDE INVESTMENT GROUP		No Response
West Texas Film Solutions LLC (robertson)		No Response
Westco Ventures LLC		No Response
Western Oilfields Supply Company dba Rain for Rent		No Response
Western Roof Co. (Bravo Sierra W Holdings LLC)		No Response
Western Shelter Systems (WS Acquisition LLC)		No Response
Westlake Hardware Inc.		No Response
White Horse Distribution, LLC		No Response
White Rock Construction & Services Inc.		No Response
Whitewall Construction (Salinas Holdings, LLC)		No Response
Wilderline LLC		No Response
Wiley Calhoon Company, Inc		No Response
Williams Business Strategies of Oklahoma, LLC		No Response
Williamson Heat and Air		Viewed
Wilson Unlimited, LLC		No Response
Window Film Dallas		No Response
wisecom technologies		No Response
Wolvestown LLC (Wolvestown LLC)		No Response
WTKCC (Woods TurnKey Conglomerate Corporation)		No Response
WURTH USA, INC		No Response
X & T Enterprise Company		No Response
X CEL BUSINESS PRODUCTS		No Response

X&TEnterprise	No Response
X-Act Plumbing LLC	No Response
Xcel Plus Group LLC (Xcel Plus Group LLC)	No Response
XHLogistics LLC	No Response
Xsaada Solutions LLC	No Response
Xtralight Manufacturing LTD	No Response
YA THECLEANERPRO INC	No Response
Yalla Ventures, Inc.	No Response
yanilex systems llc	No Response
Young's For Transit LLC	No Response
YOURS – General Construction, Facilities Maintenance, and Restoration, LLC.	No Response
Zertuche Construction Texas	No Response
ZITRO ELECTRIC LLC	No Response
Zyaa Inc	No Response

Participant Detail

(FSS) Foodservice Sustainability Solutions

Address:	2106 Moon Station Dr. NW Kennesaw, GA 30144 (800) 351-8875	Response Status:	No Response
		Invitiation Date:	5/1/2025
		Invitiation Emails:	keger@fs-sustainability.com
Classifications:	SBE (Primary)		
Participation Type:	Active Supplier		
Email Status:			
Invitiation Type:	Automatic		

11 Series Energy, Inc.

Address:	4525 Pagosa Springs Circle Melbourne, FL 32901 (918) 850-9094	Response Status:	No Response
		Invitiation Date:	5/1/2025
		Invitiation Emails:	macksasser@11seriesenergy.com russwarrington@11seriesenergy.com
Classifications:	DBE (Primary) MBE DVB SBE SBD		
Participation Type:	Active Supplier		
Email Status:			
Invitiation Type:	Automatic		

152nd LLC

Welcome to the Dynamic Small Business Search

DSBS

Interested in assisting the Federal Emergency Management Agency (FEMA) response to disasters? Click here: Doing Business with FEMA | FEMA.gov

Location of Profile

States:

(any state)
AL - Alabama
AK - Alaska
AA - American Atlantic (APO/FPO)
AE - American Europe (APO/FPO)
AP - American Pacific (APO/FPO)
AS - American Samoa
AZ - Arizona
AR - Arkansas
CA - California

(How to make multiple selections.)

Searching within a State:

(Requires exactly one state from the State list at left.)

Congressional District

County: Select 1 State, then press Lookup Lookup

Area Code or Phone Number Initial Fragment

Metropolitan Statistical Area

SBA Servicing Office

Zip Code or Zip Code Initial Fragment

Government Certifications

8(a) Certified or 8(a) Joint Venture:

- (●) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- ( ) Not Required

Women Owned Small Business(WOSB):

- ( ) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- (●) Not Required

HUBZone Certification:

- ( ) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- (●) Not Required

Economically Disadvantaged Women Owned Small Business(EDWOSB):

- ( ) Required (Active Certifications only)
- ( ) Required (Active Certifications and Previously Certified)
- ( ) Required (Previously Certified only)
- (●) Not Required

Veteran-Owned Small Business or Joint Venture:

- ( ) Required (Active Certifications only)
- (●) Not Required

Service-Disabled Veteran-Owned Small Business or Joint Venture:

- ( ) Required (Active Certifications only)
- (●) Not Required

All filters in Government Certification section will return all relevant firms, including firms with expired SAM.gov profiles.
For more information, see also SBA Certifications in the search help page.

Ownership and Self-Certifications

- [x] Any Minority Owned:
  - [x] Any Native American Owned:
    - [x] Tribally Owned
    - [x] Alaskan Native Corp (ANC) Owned
    - [x] Native Hawaiian Org (NHO) Owned
    - [x] Other Native American
  - [x] Other Minority Owned
- [x] Community Development Corporation (CDC) Owned
- [x] Self-Certified Small Disadvantaged Business
- [ ] Self-Certified Service-Disabled Veteran-Owned
- [x] Self-Certified Veteran-Owned (including Service-Disabled Veteran-Owned)
- [ ] Self-Certified HUBZone Joint Venture
- [x] Any Self-Certified Women-Owned Small Business
  - [x] Self-Certified Women-Owned Small Business
  - [x] Self-Certified Women-Owned Small Business Joint Venture

(To start over in this section, if you like, you can use this hotlink: Clear These Checkboxes)

Specific Nature of Business

NAICS Codes: (•) Any ( ) All (slower) 423830,333921,238290

Keywords: (•) Any ( ) All (slower)

General Nature of Business

[ ] Manufacturing [ ] Construction [ ] Research & Development [ ] Services

Minimum Acceptable Bonding Levels

Construction Bonding Level (per contract)

Construction Bonding Level (aggregate)

Service Bonding Level (per contract)

Service Bonding Level (aggregate)

Quality Assurance Standards

[ ] ANSI/ASQC Z1.4 [ ] ISO-9000 Series [ ] ISO 10012-1 [ ] MIL-Q-9858 [ ] MIL-STD-45662A

Size

( ) At least (•) No more than

Employees and/or Annual Gross Revenue

Capabilities

Accepts Government Credit Card? ○ Required ◉ Not Required

Exporter? ○ Yes ○ Wants to Be ○ Either ◉ Not Required

☐ Has an Export Profile in TM OnLine (*)

(*) To search the contents of "Export Profiles", use the DSBS-affiliated Trade Mission Online Search ("TM OnLine").

Searching for a specific profile

CAGE Code: CAGE Cod

UEI: UEI

8(a) Case Number: 8(a) Case #

(Note: Searching by name is slower than other criteria.)

Company Name or Trade Name: Company Name or Trade Name

○ Do "sounds like" matching

◉ Do "first letters" matching

○ Do "contains" matching

Profile Status

Last Updated

○ On or before ◉ On or after mm/dd/yyyy

Status

☑ Active (default)

☐ All (Active and Expired Profiles)

Search Results Display Options

Maximum number of profiles to be returned at a time:

Show All

Note: "Show All" shows as many profiles as you're allowed to receive, which may increase that limit to 5000. But due to a database restriction, adding "one-to-many" fields to the profile list (next item), lowers the limit to 1000. Choosing HTML Import format,below, automatically sets "Show All".

Show the following fields in the profile list:

```
Name of Firm; Contact; Address and City, State Zip;
Capabilities Narrative; E-mail Address
```

Edit the columns to be displayed

Font Size (these usually affect all formats except HTML Import as text):

○ Tiny ○ Small ◉ Normal ○ Large ○ XLarge

Format. Show the search results in:

○ Table format

◉ HTML Export format
Save As...: ○ .text ◉ .xls (spreadsheet)
If importing into Windows Excel 2007 or later, answer Yes to the format/suffix dialog.

○ Mail-merge format
Delimiter: ◉ comma ○ comma and blank ○ tab

○ Vertical format (useful for mobile users)

Search Using These Criteria | Reset | Clear

#	Name of Firm	Contact	Address and City, State Zip
1	ECTRON CORP	KARY DODD	9340 HAZARD WAY SUITE B2 SAN DIEGO, CA 92123-1228
2	TETHER, INC.	JOHN ANDERSON	760 TALLEYRAND AVE JACKSONVILLE, FL 32202-1031
3	STREET LEGAL INDUSTRIES, INC	LISA BISESE	102A JEFFERSON CT OAK RIDGE, TN 37830-4821
4	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
5	ASP WEB SOLUTIONS LLC	JOHN HALBY	2959 ELMORE PARK RD STE 1 BARTLETT, TN 38134-8379
6	GENERAL MECHANICAL CORPORATION	CYNTHIA SHAW	418 N SEGRAVE ST STE B DAYTONA BEACH, FL 32114-3145
7	COLLINS CONSTRUCTION SERVICES, INC	DAWN MORGAN	2135 ROWLAND AVE SUITE C SAVANNAH, GA 31404-4422
8	ABC CONSTRUCTION COMPANY, INC.	KIMBERLY NUGENT	714 DUNKSFERRY RD BENSALEM, PA 19020-6514
9	NATIONAL OFFICE SYSTEMS INC	BRIAN ALVAREZ	6804 VIRGINIA MANOR RD BELTSVILLE, MD 20705-4200
10	L & L DRYWALL & CONSTRUCTION, INC.	DAVID LOCKLEAR	1617 GILLESPIE ST FAYETTEVILLE, NC 28306-1847
11	DOYON TECHNICAL SERVICES, LLC	ZACHEUS RITCHEY	3450 S 344TH WAY STE 100 FEDERAL WAY, WA 98001-5931
12	A & A FIRE AND SAFETY COMPANY, LLC	APRIL FORD-BRODERICK	4380 S 1ST ST CABOT, AR 72023-7420
13	ICE TECHNICAL SERVICES INC	CYNTHIA VANDEN BERG	11001 OMALLEY CENTRE DR STE 204 ANCHORAGE, AK 99515-3096
14	C. I. CONTRACTORS, INC.	STUART JACQUES	229 E WHITNEY RD ANCHORAGE, AK 99501-1616
15	MARRERO, COUVILLON & ASSOCIATES, L.L.C.	STACEY VINCENT	2644 S SHERWOOD FOREST BLVD STE 200 BATON ROUGE, LA 70816-2248
16	ALTIMA CONSTRUCTION INC	MERVIN MARTINEZ	2200 HUBBELL CIR SW ALBUQUERQUE, NM 87105-6666
17	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992

18	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404
19	AMERIND, INC.	JORDAN L BEARD	1301 WESTPARK DRIVE LITTLE ROCK, AR 72204-2412
20	JENNRAND DIVERSIFIED, L.L.C.	RANDY RANDOLPH	120 CHERRY ST TATUM, TX 75691-1927
21	AAECON GENERAL CONTRACTING LLC	MICHAEL LATHON	2509 PLANTSIDE DR LOUISVILLE, KY 40299-2529
22	ACCU-AIRE MECHANICAL LLC	MONICA HARRIS	1463 S WW WHITE RD SAN ANTONIO, TX 78220-3429
23	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
24	GUARDIAN CONSTRUCTION, INC.	DAVID POMA	360 SOUTH FORT LANE BLDG #1 , STE D LAYTON, UT 84041-5700
25	ASPHALT PLUS, INC.	MELINDA OEDEKOVEN	425 JOHNSON LN BILLINGS, MT 59101-6714
26	ALEXTON INCORPORATED	SOPHIA MARNELL	8210 CINDER BED RD STE 2 LORTON, VA 22079-1136
27	AMERICAN MAINTENANCE & SUPPLIES, INC	ARTURO GARCIA III	120 43RD ST UNION CITY, NJ 07087-6192
28	SQN SYSTEMS CORP	JOSEPH CONLEY	12060 OPEN RUN RD ELLICOTT CITY, MD 21042-6101
29	DOC DEVELOPMENT, INC.	RADCLIFF QUARTERMAN	2500 PARK CENTRAL BLVD STE A6 DECATUR, GA 30035-3925
30	NETWORK DESIGN TECHNOLOGIES INC	JOSEPH RUFFIN	1000 N WEST ST STE 1200 WILMINGTON, DE 19801-1058
31	LAKOTA SOLUTIONS LLC	MAURICE EVANS	315 LINCOLN ST STE 300 SITKA, AK 99835-7579
32	HANK FOSTER INC	ANDREA FOSTER	13 JULIA DR MANAHAWKIN, NJ 08050-3802
33	E-LOGIC, INC.	LUIS PADILLA	2000 PENNSYLVANIA AVE NW STE 7000 WASHINGTON, DC 20006-1921
34	OSPREY MANAGEMENT LLC	KELVIN KING	1640 POWERS FERRY RD BLD 26 STE 200 MARIETTA, GA 30067-
35	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	401 HANOVER ST FREDERICKSBURG, VA 22401-5936

36	ONEILL CONTRACTORS INC	KANEY ONEILL	4307 REGENCY DR GLENVIEW, IL 60025-5209
37	SECURITY WATCH INC	ARCHENA SHARMA	801 MYRTLE AVE STE 102 EL PASO, TX 79901-1599
38	IMPACT ELECTRIC SERVICES, LLC	JASON GARCIA	1495 TIERRA DEL SOL LAS CRUCES, NM 88007-5549
39	BIZSOLUTIONS 360 INC.	PETER NGANGA	1725 DESALES ST NW STE 600 WASHINGTON, DC 20036-4413
40	BRAD CONSTRUCTION CO II, LLC	JAMEEL HANIF	500 LANIER AVE W STE 801 FAYETTEVILLE, GA 30214-7642
41	GBTI SOLUTIONS INC	WENMING KUAI	659 NALLS FARM WAY GREAT FALLS, VA 22066-1147
42	INTERNATIONAL GLOBAL SOLUTION, CORP	CLARENCE LYLES	643 MASSACHUSETTS AVE STE 200 INDIANAPOLIS, IN 46204-1653
43	ATWOOD HAY INCORPORATED	GLENDA HAY	321 ALTA VISTA AVE ROSEVILLE, CA 95678-1701
44	JCD ENGINEERING, INC.	JUAN DEL PINO	ST 19 SUITE 1, LAS PALMAS VILLAGE CATANO, PR 00962-
45	TRI COAST CONSTRUCTION, LLC	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
46	JOHN CHRIS TAYLOR CONSTRUCTION & DESIGN LLC	JOHN TAYLOR	11 MARCY ST FREEHOLD, NJ 07728-2301
47	SMARTHOST DESIGN TECHNOLOGIES LLC	FEMI DADA	5523 RESEARCH PARK DR STE 245 CATONSVILLE, MD 21228-4680
48	CAYUSE TECHNOLOGIES, LLC	JONAS MOSES-CONNER	72632 COYOTE RD PENDLETON, OR 97801-1002
49	LCG, INC.	TOM MORTON	202 N 9TH ST STE 205A BOISE, ID 83702-5781
50	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
51	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
52	2R CONSTRUCTION LLC	ROMANO DILLARD	309 E UNION ST MINDEN, LA 71055-4603
53	SOUTH EASTERN GENERAL CONTRACTING, INC.	RALPHAEL LOCKLEAR	150 SQUARE LN SHANNON, NC 28386-9035
54	CHEROKEE NATION AEROSPACE AND DEFENSE, L.L.C.	JENNYLYNN GATES	470739 HIGHWAY 51 STILWELL, OK 74960-9194

55	HARBOR SERVICES, INC	SAMMY HICKS III	4930 RIVERS AVE NORTH CHARLESTON, SC 29406-6375
56	KELLY CONSTRUCTION SERVICES INC.	KELLY FISHER	55 MAIN ST STE 5102A ENFIELD, CT 06082-3359
57	UNIFIED CONTRACTOR, INC	IVAN SANTISTEVAN	304 INDIANA ST SE ALBUQUERQUE, NM 87108-3119
58	DIAMOND DISCS INTERNATIONAL, LLC	UGO NWAGBARAOCHA	9300 WEST HEATHER AVENUE MILWAUKEE, WI 53224-2425
59	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839
60	CLAYTON CO CONSULTANTS LLC	ANNIE CLAYTON	2033 FLESHER AVE JACKSONVILLE, FL 32207-3519
61	IMEC GROUP, LLC	GUDELL WARD	6470 DOBBIN RD STE B COLUMBIA, MD 21045-4767
62	GEC TRUCKING & CONSTRUCTION, INC	GENE CARTER SR	5885 RICHARD ST JACKSONVILLE, FL 32216-5968
63	WEST PACIFIC ELECTRIC COMPANY CORPORATION	VIRGINIA VILLA	290 EL PORTAL DR PISMO BEACH, CA 93449-1504
64	MULE ENGINEERING, INC.	JARED ULEKOWSKI	14136 HUTCHINSON ST WINTER GARDEN, FL 34787-5686
65	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
66	INVENTORY MANAGEMENT SOLUTIONS, LLC	SHERMAN POWELL	10505 PLAZA DR STE B WHITMORE LAKE, MI 48189-9156
67	SPR CONSTRUCTION CORP	PRITESH PATEL	90 STATE SREET STE 700 ALBANY, NY 12207-
68	GM BUILDERS INC	RUBEN GARCIA	6051 CALLE PICO GEMELO LAS CRUCES, NM 88012-8006
69	ADVANTIX ENGINEERING CORP	JOSE QUINONES	URB CAGUAX E14 AVE LUIS MUNOZ MARIN CAGUAS, PR 00725-3331
70	ALDEVRA LLC	RODNEY MARSHALL	5865 VENTURE PARK DR KALAMAZOO, MI 49009-1849
71	H.E.P. CONSTRUCTION, INC.	SAUD JABALI-NASH	1227 MARION BARRY AVE SE WASHINGTON, DC 20020-6907
72	FARMER CONSTRUCTION L.L.C.	WILLIE FARMER	3041 MCNAUGHTON DR STE F COLUMBIA, SC 29223-1832
73	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609
			7921 W BROAD ST # 127

74	MILLENNIUM ENTERPRISES, LLC	RAJ GOWDA	RICHMOND, VA 23294-6337
75	UNIVERSAL POWER CONVERSION INC	KAREN FIRLE	12467 BOONE AVE STE 1 SAVAGE, MN 55378-1283
76	BOB WALTERS JR CONSTRUCTION INC	BOB WALTERS	15000 7TH ST STE 202A VICTORVILLE, CA 92395-3852
77	CONSTRUCTURE INC	HARMAN RANGAR	13869 REMBRANDT WAY CHANTILLY, VA 20151-3259
78	PUENTE TECHNOLOGY LLC	DAVE GUERRA	514 PROGRESS DR LINTHICUM HEIGHTS, MD 21090-2214
79	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
80	CASCADE ENTERPRISES, INC	JOE HENDRICKS	8067 W MOSSY CUP ST BOISE, ID 83709-2852
81	GREENLAND CONSTRUCTION & ENGINEERING L.L.C.	ARIEL DIAZ	5440 NW 172ND ST MIAMI GARDENS, FL 33055-3966
82	D&S INTERNATIONAL, LLC	MARLENE CAMAN	5004 BRIGHTON AVE KANSAS CITY, MO 64130-3109
83	BRC CONSTRUCTION GROUP, LLC	BRYANT CARTER	3330 N CAUSEWAY BLVD STE 326 METAIRIE, LA 70002-3573
84	CLEAN WATER MECHANICAL AND CONSTRUCTION LLC	SHAUN ROBERSON	501 JOHN JAMES AUDUBON PKWY BUFFALO, NY 14228-1143
85	BRONZE OAK, LLC	BRENT PAGE	15800 S 193RD EAST AVE BROKEN ARROW, OK 74014-8054
86	CRUTCHO CREEK FARMS LLC	RAY WILLIAMS	6625 NE 10TH ST OKLAHOMA CITY, OK 73110-3339
87	WARFEATHER, LLC	JOHN OGLESBEE	10250 S 287TH EAST AVE COWETA, OK 74429-6414
88	ADELAIDE SERVICES LLC	SELENA ALEMAN	118 BROADWAY ST STE 614 SAN ANTONIO, TX 78205-2007
89	EACM CORP	SOLANGIE ARROYO	20 MERIDIAN RD STE 1 EATONTOWN, NJ 07724-2270
90	FRONTLINE SUPPORT SOLUTIONS, LLC	JOSE PEREZ	9504 N INTERSTATE 35 STE 204 SAN ANTONIO, TX 78233-6616
91	US ECO PRODUCTS CORP	DOREEN BLADES	143 ESSEX ST STE 210 HAVERHILL, MA 01832-5553
			4028 HAMILTON ST

92	MARK-VII ENTERPRISES, INC.	MARK SANTO	OMAHA, NE 68131-1106
93	TURNER & TURNER CONTRACTING, LLC	AL TURNER	3600 JACKSON ST STE 172 ALEXANDRIA, LA 71303-3064
94	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
95	MEDVED GLOBAL INC	MICHELLE HICKS	24363 ROAD L CORTEZ, CO 81321-8805
96	GOSHAWK, LLC	BRANDON MANN	5575 TECH CENTER DR STE 217 COLORADO SPRINGS, CO 80919-2392
97	BLASCO CONSTRUCTION CORP	VIVIAN BLASCO	4265 NW 37TH AVE MIAMI, FL 33142-4243
98	BATIR ARCHITECTURE LTD	PAULA PRICE	1121 E MAIN STREET SAINT CHARLES, IL 60174-2205
99	DACAMA, LLC	DAVID SAUCEDO	711 N COPIA ST EL PASO, TX 79903-4405
100	HOLMES MECHANICAL CONTRACTORS, LLC	RENEE HOLMES	8900 EDGEWORTH DR UNIT D CAPITOL HEIGHTS, MD 20743-3734
101	JCJ CHAVEZ CONSTRUCTION INC	MARILUPE CHAVEZ	115 S GOLD CANYON ST RIDGECREST, CA 93555-4121
102	M&K GENERAL CONTRACTORS INC	KARLA FRESE	1368 WOODEN VALLEY ST CHULA VISTA, CA 91913-2936
103	NS & ASSOCIATES, LLC	MEREDITH SMITH	19512 CAMERON MILL RD PARKTON, MD 21120-8910
104	MBG INTEGRATED SOLUTIONS L. L. C.	MARK BRAILSFORD	305 PEACEFUL WAY FAYETTEVILLE, GA 30214-8403
105	ABHZEEN DESIGN INC	BHAVESH NAIK	34 SCHOOL RD E MARLBORO, NJ 07746-2056
106	PARSCO, LLC	AMIR FOOLADI	700 N DE VILLIERS ST PENSACOLA, FL 32501-3819
107	SERVITECH, INC.	JIM BARKER	13892 E SMITH DR AURORA, CO 80011-2248
108	ACTS GROUP, INC.	MILTON TORRES	1136 JENSEN DR STE A VIRGINIA BEACH, VA 23451-5872
109	K WATSON GROUP LLC	KAREN WATSON	10834 OLD MILL RD STE 4 OMAHA, NE 68154-2648
110	RYMARC CONSTRUCTION INC	BRUCE LOPEZ	3440 PRINCETON DR NE STE 217 ALBUQUERQUE, NM 87107-2028

111	QUINCON INC.	JOSE QUINTANA	200 S 13TH ST STE 101 GROVER BEACH, CA 93433-2262
112	ESSNOVA SOLUTIONS, INC.	SRIDHARA GUTTI	1500 1ST AVE N UNIT 47 BIRMINGHAM, AL 35203-1873
113	FOUR WINDS MECHANICAL HTC/AC INC.	CHAULING ARMIJO	8915 ADAMS ST NE STE B ALBUQUERQUE, NM 87113-2714
114	CASCADE SORBENT PRODUCTS INC	AL MARTINA	500 ALA MOANA BLVD STE 7400 HONOLULU, HI 96813-4902
115	BGESH INCORPORATED	WESTON HALLIBURTON	21943 DIAMOND CHASE STE 200 SAN ANTONIO, TX 78259-2743
116	BRIGGS BROTHERS ENTERPRISES CORP	TERRY BRIGGS	4749 SANSOM ST PHILADELPHIA, PA 19139-4633
117	SOL CONTRACTORS INC.	CESAR LOYA	14001 MONTANA AVE EL PASO, TX 79938-7241
118	SIERRA PACIFIC FENCE, INC.	STEVE RODRIGUEZ	2240 HUTCHISON ST VISTA, CA 92084-2529
119	INFRABUILDERS, LLC	CARLOS PINERO	111 CALLE CIELO RUBI VEGA ALTA, PR 00692-8813
120	A-1 ANHERMA, LLC	ANDRES BECERRA	100 SE 2ND ST MIAMI, FL 33131-2100
121	DK CLEANING CONTRACTORS LLC	CHIDOZIE DIKE	1517 EDGMONT AVE STE 1F CHESTER, PA 19013-5322
122	LAURA KAY DUNBAR, INC.	LAURA DUNBAR	394 E MAIN ST STE 201 VENTURA, CA 93001-4961
123	BARON COMMUNICATIONS INCORPORATED	LAFAYETTE TATEM	850 39TH ST STE 102 NEWPORT NEWS, VA 23607-3171
124	GRANITE COMMERCIAL REAL ESTATE LLC	MEGAN PRIETO GIOKAS	30 TEMPLE ST STE 300 NASHUA, NH 03060-2412
125	EARTHTEK BUILDERS	SAE JOON OH	2707 W 230TH PL TORRANCE, CA 90505-3141
126	R.T CONTRACTOR CORP.	TAMMY PHAN	11531 SALINAZ AVE GARDEN GROVE, CA 92843-3702
127	TIGUA CONSTRUCTION SERVICES, INC	KRIS WEIMERSKIRCH	12 LEIGH FISHER BLVD EL PASO, TX 79906-5239
128	SKINNER DEVELOPMENT INC	LOUIS SKINNER III	1705 ENTERPRISE WAY SE STE 200 MARIETTA, GA 30067-9224
			2026 S CALLAGHAN RD

129	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	SAN ANTONIO, TX 78227-2265
130	NEW DOMINION CONSTRUCTION LLC	ADRIAN LAWSON	2525 POINTE CENTER CT STE 100 DUMFRIES, VA 22026-2277
131	THE PLUMBING SHOP, INC	PERIDOT DAVIS	1121 FLAMINGO DR AUSTELL, GA 30168-6109
132	CINTEOT INC.	CHRISTINA HUNT	75 S MAIN ST CHAMBERSBURG, PA 17201-2224
133	SANDOW CONSTRUCTION INC	KASMERA SANTIAGO-DOWNEY	4300 48TH ST BLADENSBURG, MD 20710-1108
134	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
135	3T-INNOVATIONS, LLC	FRANCISCO VALENCIA	905 E MARTIN LUTHER KING JR DR STE 130 TARPON SPRINGS, FL 34689-4800
136	BENECORP INC	CARTER BENEFIELD	1822 15TH ST STE 14 GULFPORT, MS 39501-2104
137	PROSPERITUS SOLUTIONS LLC	KRYSTAL NERIO	1014 PEABODY AVE SAN ANTONIO, TX 78211-2844
138	ASPIRYON LLC	NEIL CRISMAN	7600 CHEVY CHASE DR SUITE 300 AUSTIN, TX 78752-1599
139	MINATOISHI PALUMBO ARCHITECTS, INC.	LORRAINE MINATOISHI	1003 BISHOP ST STE 1975 HONOLULU, HI 96813-6461
140	ETOLIN STRAIT DEVELOPMENT GROUP LLC	JAMIE VANEK	236 W 10TH AVE STE 100 ANCHORAGE, AK 99501-3638
141	TOOLS MAN, INC., THE	LUIS DEGREGORIO	5500 SW 48TH ST SUITE B DAVIE, FL 33314-4506
142	JOURNEY STEEL, INC.	BARBARA SMITH	7660 PRODUCTION DR CINCINNATI, OH 45237-3209
143	FRONT RANGE CONSTRUCTION INC	ALBERT ROGERS	3730 SINTON RD STE 211 COLORADO SPRINGS, CO 80907-5075
144	L2 DEFENSE INC	SAMUEL LENNON	12 IRONDALE ST STE 126 BALTIMORE, MD 21220-2172
145	JD BRAVO CO INC	JAMES DAVIE	136 PENNSYLVANIA AVE MALVERN, PA 19355-2418
146	SUSTECH LLC	ANGEL VAZQUEZ	CARR 848 KM 0 5 CALLE ALFA SAINT JUST TRUJILLO ALTO, PR 00976-

147	TAKOTA FLATS, LLC	WAYNE LOPEZ	35734 PARKLAWN CT ROUND HILL, VA 20141-4414
148	MARCO AMERICA CORP	AURELIO JAIMES	20 MANSFIELD RD PISCATAWAY, NJ 08854-1951
149	REON INC	MATT PERRY	14502 GREENVIEW DRIVE STE 300 LAUREL, MD 20708-3287
150	BLUE SPADER CONTRACTORS INC	BILLY COLLINS	332 S MAIN ST STE A ROMEO, MI 48065-5197
151	HANA TECHNOLOGIES & SYSTEMS, INC.	TROY COOPER	1099 ALAKEA ST STE 2520 HONOLULU, HI 96813-4524
152	MATT L. GUINN CONSTRUCTION, LLC	MATT GUINN	1716 INDUSTRIAL RD JENNINGS, LA 70546-3155
153	COGENT RESOURCES INC	JANE LEE	8616 BRICKYARD ROAD ROCKVILLE, MD 20854-1708
154	DUWRIGHT CONSTRUCTION INC	JOSEPH PEREIRA	7902 RAYTHEON RD SAN DIEGO, CA 92111-1607
155	ARGUS SERVICES INC	MONIKA SYAL	6363 AMBER LN GRAND BLANC, MI 48439-7818
156	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
157	MA-CHIS INTERNATIONAL SERVICES, INC.	NADINE SCHLOEMER	2948 COUNTY ROAD 377 ELBA, AL 36323-7088
158	COUNTY WELDING, LLC	TREVOR RAMOUTAR	15873 COMMERCE CT UPPER MARLBORO, MD 20774-7412
159	CIN-G CONTRACTING LLC	CINDY GONZALES	5285 W LOUISIANA AVE LAKEWOOD, CO 80232-5938
160	SHIVOY INC.	DANISH NAGPAUL	19440 GOLF VISTA PLZ STE 310 LEESBURG, VA 20176-8264
161	NICHOLS CUSTOM BUILDERS & DESIGN, INC.	KWESI NICHOLS	9816 EMERALD POINT DR UNIT 9 CHARLOTTE, NC 28278-6536
162	OFFICE DESIGN SOLUTIONS, LLC.	TRACEY BROWN	294 SOWELL RD MCDONOUGH, GA 30252-2986
163	CO SABINO CORP	VALENTINE VERISSIMO	301 E SILVER FOX RD NEWARK, DE 19702-1455
164	HUGH AND ASSOCIATES INC	VICTOR GILKES	1928 BENNING RD NE # 2 WASHINGTON, DC 20002-4724
			7060 S YALE AVE STE 707

165	UNAMI LLC	LAURA PONDER	TULSA, OK 74136-5717
166	POLK & ASSOCIATES CONSTRUCTION INC	REGGIE POLK	229 WARD CIR STE C22 BRENTWOOD, TN 37027-7597
167	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
168	A AND W ELECTRICAL AND REFRIGERATION A/C INC	WILBERTO ROSARIO	CARR. 155 KM 55.4 URB. ALIANZA, CALLE AZUCENA, BARRIO BARAHONA MOROVIS, PR 00687-
169	GREENSTONE CONSTRUCTION, INC.	JUSTIN LINDTEIGEN	2631 12TH AVE S STE B FARGO, ND 58103-8741
170	FG MANAGEMENT GROUP LLC	FRITO GEFFRARD	40 BROWN AVE SPRINGFIELD, NJ 07081-2902
171	PEAK ELECTRIC, INC.	MILTON MCINTYRE	320 NORTH BYRNE RD TOLEDO, OH 43607-2607
172	HD INC.	JANET HURLEY	6391 AVIATION CIR LOVELAND, CO 80538-9000
173	MILLER ELECTRIC COMPANY INC.	ANNABELLE MILLER	3945 GLEN ST RENO, NV 89502-4966
174	ARROWHEAD GLOBAL LLC	CHAD HILL	22033 US HIGHWAY 19 N CLEARWATER, FL 33765-2362
175	PREMIER MECHANICAL PRODUCTS LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314
176	LUMBEE RESOURCE MANAGEMENT GROUP LLC	JOHNNY HELMS	6440 SOUTHPOINT PKWY STE 300 JACKSONVILLE, FL 32216-8003
177	DRIVEN CONTRACTORS LLC	JOSEPH LOOCKLEAR	701 W DR MARTIN LUTHER KING JR DR MAXTON, NC 28364-1246
178	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
179	MSAB, LLC	LAURA KNIGHT	400 PERRY PKWY PERRY, GA 31069-9246
180	DARBONNIER TACTICAL SUPPLY LLC	BRITTNI DARBONNIER	951 NE 21ST CT OAK HARBOR, WA 98277-2715
181	CHEROKEE NATION ENVIRONMENTAL SOLUTIONS, L.L.C.	JENNYLYNN GATES	2 W 2ND ST STE 1500-24 TULSA, OK 74103-3123
182	LG CONSTRUCTION INC	DARRYL LEIJA	636 BROAD ST APT 107 PERRYVILLE, MD 21903-2814
183	MIG GOV, LLC	JOSE GUTIERREZ	1385 LASKIN RD VIRGINIA BEACH, VA 23451-6000
			56851 GRATIOT AVE

184	SAWYER SERVICES INC	KIM SAWYER	CHESTERFIELD, MI 48051-1308
185	GULF REMEDIATION, INC	JOSE TORRES	6649 NORTHDALE ST HOUSTON, TX 77087-6423
186	SWEAT US LLC	AUSTIN SWEAT	4124 LAZY BREEZE LN MILTON, FL 32583-2483
187	BEST VALUE MANAGEMENT, LLC	BRENDA CAMPBELL	1225 W BEAVER ST STE 12306 JACKSONVILLE, FL 32204-1414
188	CREATIVE MANAGEMENT PARTNERS, LLC	CRAIG GORHAM	201 W MAIN ST STE 100 DURHAM, NC 27701-3228
189	MATTHIS CONSTRUCTION COMPANY, INC.	CARLTON MCGRIFF	1416 CLAUDIA SPENCER STREET JACKSONVILLE, FL 32206-2516
190	SANALIL CONSTRUCTION INC	ARMON RAHMANKHAH	8400 N UNIVERSITY DR STE 310 TAMARAC, FL 33321-1713
191	NATIVE AMERICAN INDUSTRIAL SOLUTIONS LLC	JENNIFER CHAPMAN	14323 OCEAN HWY UNIT 4119 PAWLEYS ISLAND, SC 29585-4817
192	TEKSOL INTEGRATION GROUP INC	MIGUEL GONZALEZ	CARR 64 KM 4.3 BO SABANETAS MAYAGUEZ, PR 00680-
193	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
194	RIZA CONSTRUCTION INC	COREY AVENS	228 CHAPARRAL TRL JACKSONVILLE, NC 28546-9407
195	JIMENEZ MASONRY CONTRACTOR INC	DAGOBERTO JIMENEZ	6836 TUSTIN RD SALINAS, CA 93907-8571
196	THG COMPANIES LLC	CHEO HURLEY	2031 CLIPPER PARK RD STE 107 BALTIMORE, MD 21211-1490
197	PLUG IN UTILITY SERVICES CORP	KELVIN COLON	URB LEVITTOWN 1178 AVE DOS PALMAS TOA BAJA, PR 00949-4102
198	QA ENGINEERING LLC	JON ANTHONY	1409 ORTIZ DR SE ALBUQUERQUE, NM 87108-5577
199	PRIME MASONRY, LLC	JACINTO TAMEZ	2212 PRIMROSE AVE STE E MCALLEN, TX 78504-4161
200	INDIAN CREEK CONSTRUCTION, LLC	AL HANEY	211 6TH AVE SOUTH NAMPA, ID 83651-3746
201	US WEST CORP	BRANDON EVERETT	1390 N OLD PACIFIC HWY MYRTLE CREEK, OR 97457-9353
	DREAM DESIGN & CONSTRUCTION,		1101 IDLEWILD AVE

202	INC	LEANN WILKES	GREEN COVE SPRINGS, FL 32043-3903
203	OCS CONSTRUCTION SERVICES INC	MARK VACA	3664 ELIZABETH ST RIVERSIDE, CA 92506-2506
204	IKERD CONSULTING, LLC	BRENDA IKERD	10000 N CENTRAL EXPY STE 400 DALLAS, TX 75231-4180
205	ALPHA DEMOLITIONS , INC	ANTONIO MEDINA	URB MANSIONES REALES E-36 CALLE PASEO DE LA REINA GUYANABO, PR 00969-
206	RICO'S PUMP SERVICE & ELECTRIC MOTOR REPAIR LLC	ENRIQUE MONTIEL-OCHOA	520 MCCHESNEY AVE EXT TROY, NY 12180-8839
207	ML CONSTRUCTION INC	KISINA NEIUFI	503 W 100 S SPRINGVILLE, UT 84663-4964
208	BLOOMSBURIE LLC	KINHA LESTER	3542 N UTAH ST ARLINGTON, VA 22207-4444
209	CAPITAL COLORS, LLC	VERNON RAMEY	9611 COTTRELL TER SILVER SPRING, MD 20903-2229
210	VIRSIG, LLC	BRIAN VALENZA	95 SEAVIEW BLVD STE 201 PORT WASHINGTON, NY 11050-4633
211	THE SPARROW GROUP INC	DAVID WIEGAND	3620 WYOMING BLVD NE STE 230 ALBUQUERQUE, NM 87111-3297
212	SUCCESS BY DESIGN LLC	ERIC AGOSTO	8655 CHERRY LN LAUREL, MD 20707-6201
213	K2 CONTRACTING GROUP, LLC	STEVEN NAPPER	9501 DISCOVERY BLVD STE 105 MANASSAS, VA 20109-4031
214	DLJ MANAGEMENT SERVICES, LLC	DANIEL JAMES	4801 E MCDOWELL RD UNIT 210 PHOENIX, AZ 85008-7725
215	VANGUARD PACIFIC LLC	SYDNEY CODY	14051 COUNTY ROAD 9 FOLEY, AL 36535-8318
216	ONE TOUCH BUILDING MAINTENANCE LLC	JULIAN CLAYBOURNE	221 N 18TH ST KANSAS CITY, KS 66102-4916
217	ADAPT CONSULTING LLC	LISA LOWERY	598 REDWOOD RD SARATOGA SPRINGS, UT 84045-9603
218	HANA ENGINEERS & CONSULTANTS LLC	HYUNG-JUN KIM	6800 PARAGON PL STE 112 RICHMOND, VA 23230-1658
219	ABBA CONSTRUCTION, LLC	JACOB FLORES	8502 SPRING VALLEY CIR LAREDO, TX 78045-8410
	ARCHWAY SOLUTIONS LIMITED		45 CR 1110

220	LIABILITY COMPANY	ARCH STEPHENS	TROY, AL 36079-4607
221	BRIGHT REGARDS, LLC	YVONNE HERRERA	70 INDUSTRIAL PARK DR STE 3E WALDORF, MD 20602-3739
222	AXE ENGINEERING INC	TODD KIRKPATRICK	3003 SIOUX ST NW ALBUQUERQUE, NM 87107-1048
223	JIM JAM, INC.	JAMES GALLET	11003 W 59TH TER SHAWNEE, KS 66203-2956
224	SECURITY OPERATIONS GROUP INTERNATIONAL LLC	LUIS ARELLANO	428 HAVASU PT SPRING BRANCH, TX 78070-5522
225	GRENLAR HOLDINGS, INC	KALEN GRENZEBACH	16636 SIMONDS RD NE KENMORE, WA 98028-4413
226	A3 SYSTEMS CORPORATION	AUBREY HINDS	2101 OLD BERMUDA HUNDRED RD CHESTER, VA 23836-5505
227	5 SEASONS MECHANICAL LLC	TONYA HALL	6971 PEACHTREE INDUSTRIAL BLVD STE A PEACHTREE CORNERS, GA 30092-5718
228	MIA GENERAL CONTRACTING LLC	BRANDY DODD	4221A HIGHWAY 90 MILTON, FL 32571-2011
229	MX CONSTRUCTION, INC.	TIFFANY AMEZCUA	720 S FRONTAGE RD STE 106 NIPOMO, CA 93444-5626
230	SH MECHANICAL INC.	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
231	DRAKE DEVELOPERS LLC	DAVID ROYSTER	1340 RIETVELD ROW ATLANTA, GA 30318-4109
232	G TECH CONTRACTING, LLC	AGUSTIN NUNEZ	8008 DORADO TER # G BRANDYWINE, MD 20613-5809
233	MIWOK CONSTRUCTION LLC	JEFF HINDERS	3301 N BUFFALO DR STE 120 LAS VEGAS, NV 89129-7450
234	GUSTAV KEONI	ERIK WRIGHT	181 BONETTI DR SAN LUIS OBISPO, CA 93401-7310
235	VALCORP ENTERPRISES LLC	JASON PETRAS	4101 MURRAY AVE HALTOM CITY, TX 76117-1714
236	SOLVED ENGINEERING INC.	EDWARD WILLIAM	1223 CLEVELAND AVE STE 200 SAN DIEGO, CA 92103-3301
237	RADUS TEK SERVICES INC	SANGEETA G	120 OLD CAMPLAIN ROAD STE 2D HILLSBOROUGH, NJ 08844-4394
238	CHENEGA MISSION OPERATIONS, LLC	DAVID O'REAR	5253 PRUE RD STE 230 SAN ANTONIO, TX 78240-1759

239	CONSULTANTS AND COUNSELING SERVICES LLC	ROCHELLE ROBYN AGUILAR	8005 PENNSYLVANIA CIR NE ALBUQUERQUE, NM 87110-7847
240	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	404 HAUPT SQ SE LEESBURG, VA 20175-2722
241	KALVIO LLC	JONATHAN VANNATTA	2800 WOODLAWN DR STE 299 HONOLULU, HI 96822-1882
242	AMERISTAR CONTRACTING GROUP, INC.	MANUEL COTELO	1 MEMORIAL DRIVE STE 101 WARETOWN, NJ 08758-1762
243	SES ENERGY SERVICES LLC	JOHN MORRISON	10101 GLOBAL WAY KNOXVILLE, TN 37932-3422
244	ACCURA ELECTRICAL CONTRACTOR INC	MANUEL BARRERA	6187 NW 167TH ST STE H3 HIALEAH, FL 33015-4301
245	24HRC	BOBBY AMEEN	47 TESLA # 200 IRVINE, CA 92618-4669
246	CAROLINA GROUP PROPERTIES LLC	RONALD JAMES	701 S GEORGE ST STE 2 GOLDSBORO, NC 27530-5717
247	TMPC INC	JOE TEASLEY	5706 S MACDILL AVE STE 102 TAMPA, FL 33611-4449
248	AYKO GROUP LLC	CHRISTOPHER LEE	1024 SAND ISLAND PKWY UNIT A HONOLULU, HI 96819-4345
249	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	504 CAPITAL CIR SE STE A TALLAHASSEE, FL 32301-3807
250	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
251	Z SQUARED BUILDERS INC.	LOURDES MALAEKEH	5039 ROBERT J MATHEWS PKWY # 400 EL DORADO HILLS, CA 95762-5752
252	CLARK CREATIVE SOLUTIONS LLC	CRAIG WELLS	201 N CHARLES ST STE 1910 BALTIMORE, MD 21201-4123
253	RGON CORP	ROGER GONZALES	6225 NORCHESTER DR CORPUS CHRISTI, TX 78415-3926
254	VENUS SUPPLIES & SERVICES LLC	THERESA GIRIFALCO	3770 RIDGE PIKE STE 2B COLLEGEVILLE, PA 19426-3170
255	CHEROKEE NATION MECHANICAL LLC	JENNYLYNN GATES	2 W 2ND ST STE 1500-30 TULSA, OK 74103-3123
			783 W MYSTIC CREEK WAY

256	APEX ENGINEERING GROUP INC	MARCELO ESPINEL	SOUTH JORDAN, UT 84095-4691
257	TOOLS MAN, INC., THE	LUIS DEGREGORIO	1951 NW 141 ST BAY 11 OPA LOCKA, FL 33054
258	JASPER STEWARD, LLC	NANCY STEPHENSON	6841 MIRAMAR PKWY MIRAMAR, FL 33023-6023
259	QCM, INC.	SURESH PENDEM	25890 RAWLEY SPRINGS DR CHANTILLY, VA 20152-5767
260	TIGUA FACILITY SERVICES, INC.	KRIS WEIMERSKIRCH	12 LEIGH FISHER BLVD EL PASO, TX 79906-5239
261	GWO, INC.	MIRION GREEN	832 CAMBRIDGE AVE MATTESON, IL 60443-1855
262	FLATWATER, INCORPORATED	ERIN MORGAN	818 ST. AUGUSTINES DRIVE WINNEBAGO, NE 68071-5167
263	TERA CONSULTING INC.	KHURRAM BAJWA	29 ELVES LN LEVITTOWN, NY 11756-5522
264	DOFINE SPRINKLER REBUILDERS INC	DALLES DUFFIN	218 W 13TH ST BURLEY, ID 83318-1602
265	LD SUPPLY, LLC	LISA D'ALESSIO	925 HALE PL STE A6 CHULA VISTA, CA 91914-3507
266	SOLID GROUND, LLC	JOEL HARRIS	920 CHESTER LN KAYSVILLE, UT 84037-4212
267	EMPOWER CONTRACTING INC.	YOLANDA VALDES	1361 BROOKLYN BLVD BAY SHORE, NY 11706-4008
268	WYANDOTTE TECHNOLOGIES	NEIL SPENSER	15 TURTLE DR WYANDOTTE, OK 74370-2105
269	REVOLUTION MACHINE TOOLS, INC.	SHAUN WYLLIE	385 N 700 W NORTH SALT LAKE, UT 84054-2726
270	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
271	GLOBAL QUALITY SOLUTIONS, INC.	ADRIANA BLANKENSHIP	7235 BENTLEY RD STE 930 JACKSONVILLE, FL 32256-7565
272	STG PACIFIC, LLC	ROBERT CHAMPION	3700 CENTERPOINT DR STE 8155 ANCHORAGE, AK 99503-5800
273	NISOU ENTERPRISES INC	NIHARIKA SHASTRI	37279 ASPEN DR FARMINGTON HILLS, MI 48335-5479
274	THE IMPACT GROUP LLC	SULAIMAN HARRIS	3102 35TH ST NE WASHINGTON, DC 20018-1628
			3201 C ST

275	MIDNIGHT SUN GLOBAL SERVICES LLC	JOHNNY JEPPESEN	STE 801 ANCHORAGE, AK 99503-3934
276	A. JAMES GLOBAL SERVICES, INC	DINO JAMES	1000 SAINT ANDREWS RD STE C COLUMBIA, SC 29210-3103
277	GULF COAST SOLUTIONS LLC	YVETTE BREAZEALE	12300 BIG CREEK RD GULFPORT, MS 39503-7306
278	SAFECO INC	KEVIN BLOUNT	1761 CHURCH ST STE 107 NORFOLK, VA 23504-2313
279	TDX POWER SERVICES LLC	LOREN JALBERT	4501 S BANNER ST BOISE, ID 83709-5521
280	HAIDS PLUMBING & HEATING	JOHN HAID	1105 FALCON ST MILLS, WY 82644-
281	MASHIMA ELECTRIC LLC	KATHRYN MASHIMA	91-1012 IPOLANI ST APT A KAPOLEI, HI 96707-3062
282	GC WORKS INC	LANCE WAYNE	1820 SW 3RD AVE MIAMI, FL 33129-1417
283	COX-MORGAN & ASSOCIATES, LLC	DONETH MORGAN	6015 CHESTER CIR STE 202 JACKSONVILLE, FL 32217-2273
284	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
285	SHEDRICK ENTERPRISES LLC	DEREK SHEDRICK	507 TRELLIS TRL CHESAPEAKE, VA 23320-4200
286	EVANS ENGINEERING AND CONSULTING PLLC	DONALD EVANS	1810 E SCHNEIDMILLER AVE STE 221 POST FALLS, ID 83854-7989
287	RED HERITAGE MEDIA LLC	RONNIE BECK	996 AVENUE OF THE NATIONS ROCK HILL, SC 29730-7645
288	ALETO, INC.	LUIS VIERA	1440 N EDGEWOOD ST STE 178 ARLINGTON, VA 22201-7037
289	NATIVE STAR GROUP, INC	JOSH PETERSON	17406 E 425 RD JAY, OK 74346-3735
290	RDZ CONTRACTORS, INC.	PEDRO RODRIGUEZ	230 W TEFFT ST NIPOMO, CA 93444-8848
291	ANDERSON & SONS CONTRACTING LLC	DEON ANDERSON	1109 HILLSWICK LANE RAYMORE, MO 64083-9030
292	CCCS INTERNATIONAL LLC	CALVIN WHITFIELD	3436 RIVERS AVE NORTH CHARLESTON, SC 29405-7743
			1005 N POINT BLVD STE 706

293	AMERICAN VET INDUSTRIES, LLC	LEONARDO PENA	BALTIMORE, MD 21224-3402
294	ICE TECHNICAL SERVICES INCORPORATED	CYNTHIA VANDEN BERG	30713 RIVERSIDE DR STE 204 LAKE ELSINORE, CA 92530-4714
295	NVE LLC	RODNEY PATANE	11507 N 6090 W HIGHLAND, UT 84003-3749
296	PREMIUM PRODUCTS OF LOUISIANA, INC.	ANDREA DAVIS	1813 BERTRAND DR LAFAYETTE, LA 70506-2056
297	HOLLOWAY CONSTRUCTION, INC	BRANDON HOLLOWAY	13101 13TH RD W HANFORD, CA 93230-9666
298	KOPACZ BOYER DESIGN BUILD SERVICES LLC	JOSEPH KOPACZ	879 OAK HILLS DR MONUMENT, CO 80132-8829
299	DESIGNTEK CONSULTING GROUP LLC	FRED SAKAKI	746 E WINCHESTER ST STE 220 SALT LAKE CITY, UT 84107-8513
300	CAPITAL BRAND GROUP LLC	MAX BRAND	6600 VIRGINIA MANOR RD BELTSVILLE, MD 20705-1255
301	MAKRO CORP.	LAURA GONZALEZ	1761 CARR 8838 SAN JUAN, PR 00926-2741
302	ICE TECHNICAL SERVICES INC	CYNTHIA VANDEN BERG	1010 W 24TH AVE BELLEVUE, NE 68005-3912
303	NV SERVICES LLC	NEYSSA VARELA	URB. LAS LOMAS BLOQUE U3 #3 SAN JUAN, PR 00921-
304	SANTA & CO CORP	YDARMIE SANTA	2 KM 62 1 BO CANDELARIA GARROCHALES, PR 00652
305	REASOR BUILDING GROUP LLC	TED HAMILTON	7100 PLANTATION ROAD STE 11 PENSACOLA, FL 32504-6234
306	REALTIME TECHNICAL SOLUTIONS LLC	DERRICK LEVRONEY	42060 MANSFIELD PARK CT CHANTILLY, VA 20152-6424
307	MIKOCORP LLC	MATTHEW LINDSEY	1832 B RANGER HWY WEATHERFORD, TX 76088-9138
308	KOMAN INTEGRATED SOLUTIONS, LLC	RUSSELL BORMAN	2700 GAMBELL ST STE 401 ANCHORAGE, AK 99503-2833
309	RNN ARCHITECTS, INC	REBECA ARISTIZABAL	2930 S WOLFF ST DENVER, CO 80236-2013
310	POTAWATOMI DEFENSE OPERATIONS LLC	AARON FINNIGAN	3215 W STATE ST STE 309C1 MILWAUKEE, WI 53208-3364
			400 W TUDOR RD STE A400

311	MTNT TECHNICAL SERVICES, LLC	ERIC REEVES	ANCHORAGE, AK 99503-6652
312	CARDINAL STATE CONSTRUCTION LLC	KERRY ADAMS	4751 BEST RD STE 400L ATLANTA, GA 30337-5609
313	CONTRACTING & COMMUNICATIONS SERVICES, INC.	GINA TYSHING	107 ENGLEFIELD DR GAITHERSBURG, MD 20878-2661
314	DFW CAD SERVICES LLC	SHAWN MANSELL	747 SEETON RD MANSFIELD, TX 76063-6902
315	AVCOR CONSTRUCTION, LLC	AMANDA POWERS	10684 HIGHWAY 319 AUSTIN, AR 72007-9485
316	T1 CONSTRUCTION LLC	ERIK SELL	3201 TREMONT ST NORTH BEND, OR 97459-3062
317	ENVIRONMENTAL CONSTRUCTION SERVICES INC.	MICHAEL BROWN	3751 ISLAND AVE STE 205 PHILADELPHIA, PA 19153-3237
318	ANA GENERAL CONTRACTORS LLC	RAJIV PATEL	9514 MARYLAND AVE LAUREL, MD 20723-1838
319	DATUM CONSTRUCTION LLC	AMANDA JANSEN	9777 W CHINDEN BLVD 300 GARDEN CITY, ID 83714-2008
320	SUPERIOR STRUCTURES LLC	JOSHUA BOWEN	113 HOWARD ST LA PLATA, MD 20646-6949
321	ON-DEMAND SERVICES LLC	LANRE LANRE	18045 W LITTLE YORK RD KATY, TX 77449-7264
322	BUCKET PRO LLC	CHEYENNE BROOKS	1898 BUFFALO ST OLEAN, NY 14760-1142
323	VAQUEROS ELECTRICAL, LLC	OTHON RUIZ	424 W ANSLEY ST SAN ANTONIO, TX 78221-3101
324	BCP PARTNERS, L.L.C.	JULIO ARANA	1097 BERT ST LA PLACE, LA 70068-5301
325	SES ENERGY SERVICES LLC	JOHN MORRISON	111 W 16TH AVE STE 415 ANCHORAGE, AK 99501-5169
326	AMERICAN MARINE & TECHNICAL SERVICES LLC	MAURICE EVANS	315 LINCOLN ST STE 300 SITKA, AK 99835-7579
327	SES ENERGY SERVICES LLC	JOHN MORRISON	10815 GULFDALE ST STE 8 SAN ANTONIO, TX 78216-3608
328	DV SOLUTIONS LLC	DERRICK SURRATT	120 E WASHINGTON ST CAMDEN, AR 71701-4010
329	IDEAL CONSTRUCTION SERVICES INC	STEVEN PRESCOTT	200 CLAY ST WESTON, MO 64098-1014

330	DBRA CONSTRUCTION, LLC	DERAGE ALEMAYEHU	9421 WOODED GLEN AVE BURKE, VA 22015-4231
331	SNODGRASS CONTRACTING LLC	JEFF SNODGRASS	1910 TOWNE CENTRE BLVD STE 250 ANNAPOLIS, MD 21401-3599
332	BLUE CONSTRUCTION SERVICES LLC	SEPTEMBER BLUE	633 YORK LN SE LEESBURG, VA 20175-4017
333	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
334	WEBMYERS CONSTRUCTION, LLC	CHONDRA MYERS	180 INTERSTATE NORTH PKWY SE STE 125 ATLANTA, GA 30339-6606
335	GREENCLEAN, INC.	MAXIMILIAN VU	6399 LITTLE RIVER TPKE STE 300 ALEXANDRIA, VA 22312-5093
336	TYONEK CONTRACTOR SERVICES, LLC	STEPHEN PESKOSKY	880 H ST STE 210 ANCHORAGE, AK 99501-3450
337	GOSHAWK, LLC	BRANDON MANN	1600 GENESSEE ST STE 728 KANSAS CITY, MO 64102-1039
338	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	615 BARONNE ST STE 205 NEW ORLEANS, LA 70113-1016
339	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	4203 WOODCOCK DR STE 265 SAN ANTONIO, TX 78228-1312
340	ALL ABOVE LLC	CARL DEAN	8 WESTBURY DR BERLIN, NJ 08009-9682
341	Imec Group, Llc	Gudell Ward	1299 PARKWAY DR GOLDSBORO, NC 27534-3486
342	TM SERVICES AND CONSULTANTS, LLC	TIMOTHY BURNSIDE	2437 E SUNNY MEADE DR HARVEY, LA 70058-2140
343	MIDNIGHT SUN GLOBAL SERVICES LLC	JOHNNY JEPPESEN	1577 SPRING HILL RD STE 320 VIENNA, VA 22182-2446
344	MIDNIGHT SUN GLOBAL SERVICES LLC	NEIL MILLER	4500 ROCKSIDE RD INDEPENDENCE, OH 44131-2131
345	B3 CONSTRUCTION, INC	ANDREW BEAN	2454 EDDING DR LEMON GROVE, CA 91945-3114
346	HERITAGE INTERIORS LLC	GREGORY PETERSEN	2553 DULLES VIEW DR STE 700 HERNDON, VA 20171-5228
347	CINKA CONSTRUCTION & CONSULTING SERVICES LLC	CYNTHIA MARTIN	307 SAINT KITTS LOOP SAINT AUGUSTINE, FL 32092-1181

348	ADVETAGE SOLUTIONS LLC	CHRISTOPHER ROYCE	111 PENN ST STE 202 EL SEGUNDO, CA 90245-3908
349	VANGUARD PACIFIC LLC	SYDNEY CODY	2207 GARNET AVE STE N SAN DIEGO, CA 92109-3713
350	CHEROKEE NATION DEVELOPMENT GROUP, L.L.C.	JENNYLYNN GATES	2 W 2ND ST STE 1500-36 TULSA, OK 74103-3123
351	DIAMOND CAPTURE ASSOCIATES LLC	BARBARA RIVERA	8192 LOST CREEK LN DELRAY BEACH, FL 33446-0022
352	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
353	IPHONE & IPAD WAREHOUSE LLC	BRIAN FARRELL	19101 NE 18TH AVE MIAMI, FL 33179-4214
354	QAYAQ GOVERNMENT SOLUTIONS LLC	LORI SCHENDEL	6700 ARCTIC SPUR RD ANCHORAGE, AK 99518-1550
355	WASEYABEK FEDERAL SERVICES, L.L.C.	VANESSA HATFIELD	16 MONROE CENTER ST NE STE 200-A GRAND RAPIDS, MI 49503-3208
356	KIRA INFRASTRUCTURE LLC	RICHARD RINEHART	1150 ACADEMY PARK LOOP STE 230-H1 COLORADO SPRINGS, CO 80910-3714
357	BORJA ENGINEERING & CONSTRUCTION, INC	SAMSON BORJA	16766 BERNARDO CENTER DR SAN DIEGO, CA 92128-2545
358	CHIRICAHUA PROCUREMENT LLC	JOHN WOFFARD	320 GOLD AVE SW STE 806 ALBUQUERQUE, NM 87102-3202
359	JVR LLC	JAVIER VILLARREAL	128 SEALE RD SAN ANTONIO, TX 78219-2711
360	AJCE CORPORATION	ANTHONY CISNEROS	8570 SW 127TH ST CORAL GABLES, FL 33156-5819
361	DUMOUR SERVICES LLC	JACQUELINE PERKINS	201 CRATER WOODS CT PETERSBURG, VA 23805-9100
362	RSI SERVICES LLC	ALLISON GETSI	151 LAFAYETTE DR STE 100 OAK RIDGE, TN 37830-2502
363	TRADE ON DEMAND, INC.	PAPA MBOW	2550 MERIDIAN BLVD STE 200 FRANKLIN, TN 37067-6384
364	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
365	REALCO DEVELOPMENT LLC	JONATHAN BRADSHAW	1310 N FORT CANYON RD ALPINE, UT 84004-1136

366	WASHINGTON CONTRACTOR SERVICES LLC	EDWIN LANSANG	6204 96TH ST E PUYALLUP, WA 98371-6174
367	ELEVATED DESIGN AND CONSTRUCTION LLC	MICHAEL BEARD	8209 SW 1ST PL GAINESVILLE, FL 32607-1518
368	W E S T DEVELOPMENT, INC.	ALLEN SHABILLA	912 S ANDREASEN DR STE 107 ESCONDIDO, CA 92029-1900
369	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
370	KEKOLU CONTRACTING, LLC	KENDIS KADO	9375 CHESAPEAKE ST STE 209 LA PLATA, MD 20646-3654
371	ALL ACES CORP	MIGUEL PEREZ	1 S OCEAN AVE STE 204 PATCHOGUE, NY 11772-3716
372	EASTHILL CONSTRUCTION CORP	VEDANT BHANDERI	17 ACADEMY ST STE 515 NEWARK, NJ 07102-2932
373	PED CONCEPTS INC.	KELLEY PITTMAN	10752 DEERWOOD PARK BLVD SOUTH WATERVIEW II STE 100 JACKSONVILLE, FL 32246-
374	ALPHA DEMOLITIONS , INC	ANTONIO MEDINA	CARR 685 KM 1.5 BAJURAS WARD MANATI, PR 00674-
375	YUKON MANAGEMENT, LLC	TIMOTHY GAYLES	3900 C ST STE 100 ANCHORAGE, AK 99503-5962
376	ARETE CONTRACTING LLC	KYLE TE	220 E DUNKLIN ST JEFFERSON CITY, MO 65101-3127
377	CAPITOL UNITED SOLUTIONS INC	KARAMJEET BASSAN	9007 BUSH CREEK CIR FREDERICK, MD 21704-7844
378	BROOKES CONSTRUCTION LLC	CHISA BROOKES	3202 WILKINSON BLVD #667492 CHARLOTTE, NC 28208-5659
379	JNB SERVICES LLC	WILLIAM HOLLEY	467 S DALEVILLE AVE DALEVILLE, AL 36322-2350
380	MICRON AIR & MECHANICAL SOLUTIONS INC	KEVIN BUENO	3553 BLACKWELL PL LEXINGTON, KY 40509-9091
381	SPECIALTY CONSTRUCTORS SERVICES INC.	JOSE RODRIGUEZ	197 N 10TH ST STE 203 GROVER BEACH, CA 93433-2159
382	AIKO ENTERPRISES, INC	BEN ARNOLD	4250 LAKESIDE DR STE 213 JACKSONVILLE, FL 32210-3369
383	STILES GENERAL CONTRACTORS LLC	ADELIZ STILES	6505 ANGORA LOOP ST S EL PASO, TX 79934-

384	COPELAND CONTRACTING COMPANY INC	ELSA NIEVES BROWN	1425 UNIVERSAL CITY BLVD BLDG 3 SAN ANTONIO, TX 78148-3364
385	RENO/TAHOE REALTY GROUP LLC	SARAH CARMONA ZINK	232 ANACAPA ST STE 2C SANTA BARBARA, CA 93101-1841
386	L.J.V. DEVELOPMENT, LLC	LISETH VELEZ	50 MILK ST FL 16 BOSTON, MA 02109-5002
387	LEGENDS CONSTRUCTION & DESIGN INC	JOE HOPE	354 OAKWOOD TRL CRAWFORDVILLE, FL 32327-3474
388	CHAMPION COMMERCIAL FENCE BUILDERS, LLC	MIKE RATHE	809 WESTMERE AVE STE C-215 CHARLOTTE, NC 28208-5342
389	ATLANTIC PACIFIC STANDARD LLC	RICHARD OTERO	3001 S 12TH AVE UNIT 1 TUCSON, AZ 85713-6247
390	ALEUT LOGISTICS SERVICES, LLC	ROBERT CAVINESS	5775 MARK DABLING BLVD STE 105 COLORADO SPRINGS, CO 80919-2241
391	THE JAHNDA GROUP, LLC	JESSE ACOSTA	26150 ENTERPRISE WAY STE 200 LAKE FOREST, CA 92630-8413
392	GSI HAWAII INC	JOSEPH LUCAS, IV	181 S KUKUI ST HONOLULU, HI 96813-2306
393	OPTIMA CONTRACTING LLC	AMIN HUSSEIN	4705 EISENHOWER AVE, SUITE A ALEXANDRIA, VA 22304-4805
394	AOR LOGISTICS, LLC	PAUL NESBIT	130 W MAIN ST STE 206 ORANGE, VA 22960-1555
395	ABOHA LLC	CHAD DAVIS	5237 FOREST VIEW RD LAKESIDE, AZ 85929-5730
396	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	111 N ORANGE AVE STE 1020 ORLANDO, FL 32801-2399
397	GRAYLEE CONSTRUCTION LLC	SEAN BEAVERS	1307 HIGHWAY 64 W BEEBE, AR 72012-9518
398	NEXT GENERATION DEVELOPMENT, LLC	DANIEL OKORIE	2525 ROBINHOOD ST STE 216 HOUSTON, TX 77005-2573
399	MILLER ELECTRIC COMPANY INC	ANNABELLE MILLER	2730 SW 57TH ST STE C TOPEKA, KS 66609-9417
400	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
			18 N UNIVERSITY AVE

401	MILLER ELECTRIC CO INC	ANNABELLE MILLER	STE 40 PROVO, UT 84601-8406
402	YUKON MANAGEMENT LLC	TIMOTHY GAYLES	112 N WATER ST SPARTA, WI 54656-1737
403	ICE TECHNICAL SERVICES INCORPORATED	CYNTHIA VANDEN BERG	505 ENON SPRINGS RD E STE 505 SMYRNA, TN 37167-4442
404	ICE TECHNICAL SERVICES INCORPORATED	CYNTHIA VANDEN BERG	240 N EAST PROMONTORY STE 200 OFC 207 FARMINGTON, UT 84025-2950
405	ADAPT CONSULTING LLC	LISA LOWERY	17645 E OLD CHERRY RD DEWEY, AZ 86327-7315
406	RYMARK CONTRACTING, INC	RYAN PRICE	19901 JODI DR LUTZ, FL 33558-5005
407	ATMOS SOLUTIONS INC	ANTHONY FERNANDO	6856 EASTERN AVE NW STE 205 WASHINGTON, DC 20012-2165
408	Miller Electric Company Inc.	Annabelle Miller	471-800 JOHNSTONVILLE DR STE 102 SUSANVILLE, CA 96130-8619
409	SES ENERGY SERVICES LLC	JOHN MORRISON	3550 SAINT JOHNS BLUFF RD S STE 8 JACKSONVILLE, FL 32224-3618
410	ARROWHEAD CONTRACTING INC	RYAN FRAZIER	504 W INTENDENCIA ST PENSACOLA, FL 32502-5537
411	D AND D, LLC	DAVID JSA	10821 PLANTSIDE DR STE 106 LOUISVILLE, KY 40299-6132
412	NAVANCIO LLC	HARSHA CUTTARI	200 MASSACHUSETTS AVE NW 08-150 WASHINGTON, DC 20001-1429
413	AHTNA SOLUTIONS, LLC	PATRICK HARRIS	110 W 38TH AVE STE 200L ANCHORAGE, AK 99503-5677
414	COMPASS ROOFING LLC	LUIS ALLAN ARIAS	7901 PROSPECT AVE KANSAS CITY, MO 64132-2308
415	ARCTIC PEAK LLC	GREGORY PETERSEN	2553 DULLES VIEW DR HERNDON, VA 20171-5226
416	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
417	LEGACY BUILDERS CONSTRUCTION, INC	HECTOR AGUILAR	910 W 19TH ST UPLAND, CA 91784-1503
418	ETOLIN STRAIT DEVELOPMENT GROUP LLC	JAMIE VANEK	7440 CENTRAL BUSINESS PARK DR STE 104 NORFOLK, VA 23513-2827

419	INNOVATIVE MECHANICAL CONTRACTORS LLC	JASON QUINTO	950 BACHMANS VALLEY RD WESTMINSTER, MD 21158-3122
420	EVERSON CONSTRUCTION GROUP, LLC	JOHN EVERSON	12731 FLYNN FOREST DRIVE JACKSONVILLE, FL 32223-1845
421	FOUR TRIBES CIVIL CONSTRUCTION LLC	DOYLE LOWRY	656 QUINCE ORCHARD RD STE 700C GAITHERSBURG, MD 20878-1418
422	NAIR CONTRACTING GROUP, LLC	JAIDEEP NAIR	9694 SHEPARD PL WELLINGTON, FL 33414-6420
423	KINGSTRUCTION, INC	JEFFREY KING	326 TIMBERLINE DR CRESTVIEW, FL 32539-8330
424	MIAMI WIIPICA, LLC	LANCE HERRMAN	1950 ROLAND CLARKE PL STE 210E RESTON, VA 20191-1414
425	KOMAN ADVANTAGE, LLC	ALLEN SANDER	2700 GAMBELL ST STE 401 ANCHORAGE, AK 99503-2833
426	PROPERTY IMPROVEMENT OF NEW BRUNSWICK LLC	GREGORY REID	40 W LAFAYETTE STREET TRENTON, NJ 08608-2011
427	KAOHIAI ELECTRICAL CONTRACTING, LLC	KEONI HALL	41 730 HALEIKI PL WAIMANALO, HI 96795-
428	ALEUT LOGISTICS SERVICES, LLC	ROBERT CAVINESS	4000 OLD SEWARD HWY STE 300 ANCHORAGE, AK 99503-6079
429	CHUGACH SOLUTIONS ENTERPRISE, LLC	KEVIN TERRY	3800 CENTERPOINT DR STE 1200 ANCHORAGE, AK 99503-5825
430	REDTOWN TECHNICAL SERVICES, LLC	DANIELLE LEDFORD	3100 MONITOR AVE STE 140 RM 142 NORMAN, OK 73072-7807
431	HILO ENTERPRISES LLC	DANIEL MARQUARDT	10432 BALLS FORD RD STE 300 MANASSAS, VA 20109-2517
432	GLOBAL QUALITY SOLUTIONS, INC.	Adriana Blankenship	4525 S SANDHILL RD STE 103 LAS VEGAS, NV 89121-5955
433	FULCRUM CONTRACTING GROUP LLC	JORGE JARAMILLO	3073 STORMY POINT DR EL PASO, TX 79938-5001
434	E.K. MANAGEMENT, L.L.C.	EDNA KEEFE	909 EMILY CIR FORT WALTON BEACH, FL 32547-1980
435	DMT ELECTRIC LLC	TRAVIS DURAN	2093 W 25TH ST YUMA, AZ 85364-6911
436	MA-CHIS-WB JV LLC	NADINE SCHLOEMER	3102 COUNTY ROAD 305 ELBA, AL 36323-7678
437	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	7620 N HARTMAN LN STE 126A TUCSON, AZ 85743-8263
			310 DALLAS ST

438	FOREST TRAIL CO LLC	JOSE JUAN AREVALOS	EL PASO, TX 79901-1822
439	M&T GROUP INC	JUAN MORALES PADILLA	CARR. 811, KM. 1.1 INTERIOR BO. CEDRO ABAJO NARANJITO, PR 00719-
440	GRACEN ENGINEERING & CONSTRUCTION INC	STEVEN SAMBRANO II	906 N MESA ST STE 202 EL PASO, TX 79902-4080
441	MOUNTAIN POINT, LLC	JASON BROWN	14360 NEWBROOK DR STE 200 CHANTILLY, VA 20151-4206
442	GOLDBELT OPERATIONS SUPPORT SERVICES LLC	SEAN GOLDSMITH, PE	2681 PHILADELPHIA AVE CHAMBERSBURG, PA 17201-7908
443	THE H.A.B.I.T.S GROUP LLC	ZACHARIAS JOHNSON	6448 E HIGHWAY 290 STE B106 AUSTIN, TX 78723-1038
444	CJ MECHANICAL LLC	CARMELO GARCIA	CARR 814 KM 0.4 BO ANONES NARANJITO, PR 00719-
445	PUYENPA CONSTRUCTION, LLC	EMILY STOUT	511 DUCKWATER FALLS RD DUCKWATER, NV 89314-9800
446	PERFECT GLASSWORKS, LLC	MIKHAIL AN	7901 BEECHCRAFT AVE STE T GAITHERSBURG, MD 20879-1594
447	ALTERNATIVE COATINGS SOLUTIONS, INC.	ANGELICA IBARRA	30032 CIELO MESA TEMECULA, CA 92592-5105
448	HD INC	JANET HURLEY	3116 E LYNDALE AVE HELENA, MT 59601-6445
449	SANALIL CONSTRUCTION, INC.	ARMON RAHMANKHAH	3801 E FLORIDA AVE STE 400 UNIT 56 DENVER, CO 80210-2543
450	VANGUARD PACIFIC LLC	SYDNEY CODY	119 W GARDEN ST PENSACOLA, FL 32502-5617
451	TLI CONSTRUCTION, INC.	CINDY LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
452	PARADIGM CONSTRUCTION SERVICES, LLC	SAMUEL PADILLA	4148 N ARCADIA DR STE 4 PHOENIX, AZ 85018-4302
453	TORRENCE & COMPANY, LLC	ERIC "RICKY" TORRENCE	5752 NC HIGHWAY 41 W TRENTON, NC 28585-5562
454	SILVER-SMITH DEVELOPMENT, LLC	PAMELA JONES-SMITH	1196 CAPITAL CIR NE STE A TALLAHASSEE, FL 32301-3531
455	KOMAN INTEGRATED SOLUTIONS LLC	RUSSELL BORMAN	5632 N 54TH AVE GLENDALE, AZ 85301-6014
456	RIOMAR GROUP VENTURES, INC.	TONY ALONSO	50 OCEAN PKWY APT 2E BROOKLYN, NY 11218-1543

457	CASTOR, LLC	COURTNEY GALLIANO	10777 GREENWELL SPRINGS RD BATON ROUGE, LA 70814-5013
458	MODESTO MANAGEMENT LLC	ERIC DOBYNE	525 S SCOVILLE AVE APT 1 OAK PARK, IL 60304-1485
459	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	5470 S MONROVIA AVE TUCSON, AZ 85706-2120
460	A & E HEATING AND AIR CONDITIONING LLC	WARREN STROTHER	513 11TH ST SE FL 2 WASHINGTON, DC 20003-2831
461	M & G CLEANING & PAINTING SERVICES INC.	MARIA GAITAN	4030 6TH ST BALTIMORE, MD 21225-2108
462	DOYON TECHNICAL SERVICES LLC	ZACHEUS RITCHEY	4601 PRESIDENT DRIVE SUITE 230A GLENARDEN, MD 20706-4365
463	AVANTE CONSTRUCTION INC	YOKO LARKIN	9380 ACTIVITY RD STE J SAN DIEGO, CA 92126-4413
464	HEIDELBERG RESOURCES, LLC	RONALD BERGER	1609 ANTOINETTE DR CORPUS CHRISTI, TX 78418-5404
465	CFS MEDICAL SUPPLIES AND EQUIPMENT, INC	TARA SLAUGHTER	2114 REDONDO BEACH BLVD TORRANCE, CA 90504-1616
466	TVC CONSTRUCTION CORP	CARLOS VALERA	2500 NW 79TH AVE STE 177 MIAMI, FL 33122-1082
467	FILLMORE CONTRACTS, LLC	KIMBERLY KIDD	2330 SCENIC HWY S STE 203 SNELLVILLE, GA 30078-3115
468	MJAG CONSTRUCTION SERVICES, LLC	FELICIA WHITE	10019 S 10TH ST BELLEVUE, NE 68123-4014
469	TEYA SUPPORT SERVICES LLC	RON PERRY	101 E 9TH AVE STE 9B MS-05 ANCHORAGE, AK 99501-3651
470	QUINCON, INC.	JOSE QUINTANA	2363 THOMPSON WAY UNIT F SANTA MARIA, CA 93455-1042
471	CONEMCO ENGINEERING, INC.	JOSE COMPRES	782 NW 42ND AVE STE 635 MIAMI, FL 33126-5547
472	GC WORKS INC	LANCE WAYNE	9894 BISSONNET ST STE 241 HOUSTON, TX 77036-8239
473	MA-CHIS INTERNATIONAL SERVICES INC	NADINE SCHLOEMER	2080 WAITE ST FORT BENNING, GA 31905
474	DOYON TECHNICAL SERVICES, LLC	ZACHEUS RITCHEY	33 COLLEGE HILL RD BLDG 31 WARWICK, RI 02886-2776

475	ARCHWAY SOLUTIONS LLC	ARCH STEPHENS	9743 ARLEEN AVE ZACHARY, LA 70791-8325
476	ET SERVICES LLC	DEREK WILLIAMS	2561 ARUNDEL RD ATLANTA, GA 30337-4905
477	AFN, LLC	MICHAEL AJAYI	3750 MCKEE RD STE B SAN JOSE, CA 95127-2000
478	LALINI ENTERPRISES LLC	LALINI PILLAY	1400 MONTAGUE ST NW WASHINGTON, DC 20011-2870
479	TRI COAST-PAC TECH JV LLLP	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
480	HILO BAC JV LLC	DANIEL MARQUARDT	10432 BALLS FORD RD STE 300 MANASSAS, VA 20109-2517
481	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431
482	MIDNIGHT SUN GLOBAL SERVICES, LLC	JOHNNY JEPPESEN	5700 6TH AVE S STE 105A SEATTLE, WA 98108-2513
483	DAWSON MCG, LLC	DEREK MAR	900 FORT STREET MALL STE 1850 HONOLULU, HI 96813-3707
484	KAIVA SERVICES, LLC	CAMERON ECHOHAWK	6060 W 3650 N STE 400 IVINS, UT 84738-6618
485	JBA CONSTRUCTION LLC	BRADLEY TAKAMORI	740 KOHOU ST STE A HONOLULU, HI 96817-4443
486	RM EXTERIORS GROUP LLC	ALEX VELA	2160 KINGSTON CT SE STE M1 MARIETTA, GA 30067-8951
487	EPIC TECHNICIANS HVAC LLC	MARIAN HUNTER	6115 STARGATE CV ALEXANDER, AR 72002-1787
488	GY6, LLC	STEVE CHAN	195 TUN JOSE SALAS ST STE A TAMUNING, GU 96913-3811
489	ALLIE BRIDGE ENERGY SOLUTIONS	REBECCA WETZSTEIN	1343 N GRAND AVE STE 210 COVINA, CA 91724-4043
490	TRUEDGE SOLUTIONS, LLC	SUNG CHOI	744 CALABRIA LANE AMBLER, PA 19002-1539
491	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
492	FMS PROVIDER LLC	LAURA SAPIR	2276 SW 183RD TER MIRAMAR, FL 33029-5253
			7281 DUMOSA AVE

493	NEWA ENTERPRISES, INC.	BRAD ALBONE	YUCCA VALLEY, CA 92284-3769
494	DOC DEVELOPMENT INC	RADCLIFF QUARTERMAN	300 S 1ST ST STE 302 LEESVILLE, LA 71446-4372
495	DOLIVEIRA DJB JV II LLC	JAMIE DOLIVEIRA	8411 OLD MARLBORO PIKE STE 24 UPPER MARLBORO, MD 20772-2622
496	CAPITOL STEAM AND CLEAN, LLC	NATHANIEL BURTON	2108 VIRGINIA AVE HYATTSVILLE, MD 20785-4944
497	BERT CONSTRUCTION INC	OTIS ROBERTS	5045 PATTERSON RD MONTGOMERY, AL 36116-5820
498	KOMAN INTEGRATED SOLUTIONS LLC	RUSSELL BORMAN	8079 E MAIN ST STE 101 PORT ORCHARD, WA 98366-7515
499	CARTOLI, LLC	CAMILLE EHIAMETALOR	535 TALBERT DR STE 209 PLANO, TX 75093-0042
500	LOPEZ-GUERRA CONSTRUCTION LLC	CAMILA RICH	8400 OSUNA RD NE STE 3A ALBUQUERQUE, NM 87111-2070
501	MIDNIGHT SUN AUS LLC	ELEANOR DAVIS	1577 SPRING HILL RD STE 320 VIENNA, VA 22182-2446
502	KITUWAH SERVICES, LLC	TERRY MOGENSEN	1158 SEVEN CLANS LN WHITTIER, NC 28789-0749
503	ARGUS SERVICES INC	MONIKA SYAL	30 CATOCTIN CIR SE STE 10 LEESBURG, VA 20175-3614
504	ARGUS SERVICES INC	MONIKA SYAL	5008 LENKER ST STE 201 MECHANICSBURG, PA 17050-1925
505	MH CONTRACTING LLC	MANUEL HERRERA	15649 VISTA GRANDE HELOTES, TX 78023-3810
506	DMYLES INC.	Darius A Myles	2140 DREW ST STE B CLEARWATER, FL 33765-3218
507	SES ENERGY SERVICES LLC	JOHN MORRISON	7804 E FUNSTON ST STE 206 WICHITA, KS 67207-3107
508	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	630 ELLIS ST STE 2-D AUGUSTA, GA 30901-1464
509	NATIVE CONSOLIDATED MANAGEMENT LLC	SANDRA CHEN	1221 WEST CAMPBELL ROAD SUITE 203 RICHARDSON, TX 75080-2948
510	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	841 PRUDENTIAL DR STE 1215 JACKSONVILLE, FL 32207-8329
			9848 WIND AVE

511	4M GENERAL CONTRACTORS LLC	JUSTIN MOTLOW	LAKELAND, FL 33809-1650
512	MIDNIGHT SUN GLOBAL SERVICES, LLC	NEIL MILLER	3041 BERKS WAY STE 102F RALEIGH, NC 27614-6777
513	BENECORP INC	CARTER BENEFIELD	1201 SHADOWLAWN DR STE 116 SAINT MARYS, GA 31558-4074
514	MOUNTAIN POINT, LLC	JASON BROWN	1711 S LAREDO ST RM 102 SAN ANTONIO, TX 78207-7076
515	PER-GEESH CONSTRUCTION CORPORATION	PAMELA AMES	190 KLAMATH BLVD KLAMATH, CA 95548-9322
516	KOMAN ADVANTAGE LLC	ALLEN SANDER	8002 WESTWAY DR OFFICE #4 HARLINGEN, TX 78552-6479
517	GC WORKS INC.	LANCE WAYNE	38 ROMNEY ST STE 103 CHARLESTON, SC 29403-3825
518	PUYENPA CONSTRUCTION LLC	EMILY STOUT	207 E RIDGEVILLE BLVD MOUNT AIRY, MD 21771-5257
519	CHAVES BROTHERS MANAGEMENT, LLC	TYLER CHAVES	300 SW 8TH ST APT 17 BOCA RATON, FL 33432-5775
520	SES ENERGY SERVICES LLC	LORNA PACE	990 LAKE HUNTER CIR STE 207 MOUNT PLEASANT, SC 29464-5426
521	TLI CONSTRUCTION, INC.	CYNTHIA LINCICOME	7900 EAST UNION AVENUE SUITE 1100 DENVER, CO 80237-2746
522	SOLAR STEP LLC	LOURDES MARCANO	REPARTO TERESITA U-10 CALLE 20 BAYAMON, PR 00961-8352
523	BENECORP, INC.	CARTER BENEFIELD	2439 MANHATTAN BLVD STE 102-3 HARVEY, LA 70058-5473
524	BENECORP, INC.	CARTER BENEFIELD	501 QUINTARD AVE UNIT 19 ANNISTON, AL 36201-5700
525	BENECORP CONTRACTORS INC	CARTER BENEFIELD	6706 N 9TH AVE STE C6 PENSACOLA, FL 32504-7379
526	RED BISON SERVICES, LLC	RONALD ORTEGO III	2232 FAYETTE ST KENNER, LA 70062-7938
527	RIZA CONSTRUCTION INC.	COREY AVENS	400 W 7TH ST STE 105A BLOOMINGTON, IN 47404-3900
			1345 K ST SE

528	RANGE CONSTRUCTION LLC	YOVANI SALOME-SANCHEZ	UNIT 203 WASHINGTON, DC 20003-4543
529	PUYENPA CONSTRUCTION LLC	EMILY STOUT	813 MAIN ST PORTAGE, PA 15946-1757
530	PUYENPA CONSTRUCTION LLC	EMILY STOUT	109 W MAIN ST STE E CLINTON, NC 28328-4046
531	CHIRICAHUA PROCUREMENT LLC	MIKE GANN	2315 E GORE BLVD LAWTON, OK 73501-6116
532	PIERCE & SONS CONSTRUCTION, LLC	NATHAN PIERCE	3686 BARLOW RD LUMBER BRIDGE, NC 28357-7972
533	ALL AMERICAN FEDERAL CONSTRUCTION LLC	MONIQUE EADDY	27202 STONE HARBOUR LN KATY, TX 77494-3691
534	K2 CONTRACTING GROUP LLC	STEVEN NAPPER	112 MAIN STREET SUITE 2 NATCHEZ, MS 39120-3458
535	MD DOYNE CONSTRUCTION LLC	MASON DOYNE	5009 E 39TH ST LITTLE ROCK, AR 72206-3703
536	K2 CONTRACTING GROUP, LLC	STEVEN NAPPER	8166 COCKBURN CT APT 303 LORTON, VA 22079-2932
537	YUKON MANAGEMENT, LLC	TIMOTHY GAYLES	2000 TOWER OAKS BLVD 6TH FL, STE A ROCKVILLE, MD 20852-4282
538	BRIGGS BROTHERS ENTERPRISES CORP	TERRY BRIGGS	413 ODELL INDUSTRIAL WAY GRIFFIN, GA 30224-8451
539	SDJV	JEFF SNODGRASS	114 E WASHINGTON ST SEYMOUR, MO 65746-8680
540	DOYON CONTRACTING SERVICES, LLC	WILLIAM LINE	3450 S 344TH WAY STE 100 FEDERAL WAY, WA 98001-5931
541	Four Tribes Enterprises, LLC	Doyle Lowry	5100 Buckeystown Pike Ste 223 Frederick, MD 21704-8336
542	NEW DOMINION CONSTRUCTION, LLC	BRYAN DISEATI	9668 MADISON BLVD STE 142 MADISON, AL 35758-9127
543	CCI ELECTRICAL CONTRACTORS, LLC	JOHN MORRISON	4100 LEGENDARY DR STE 250C DESTIN, FL 32541-8608
544	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
545	HVAC ALLIES LLC	THADDEUS REAY	2479 YOLANDA TRL ELLENWOOD, GA 30294-1703
			42091 ORANGE BLOSSOM DR

546	LUNOOR CONSTRUCTION INC.	RODOLFO LUCAR	TEMECULA, CA 92591-5543
547	IGS STRATEGIC JV LLC	CLARENCE LYLES	643 MASSACHUSETTS AVE STE 200 INDIANAPOLIS, IN 46204-1653
548	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	101 PARK AVE STE 1335 OKLAHOMA CITY, OK 73102-7209
549	YERKES SOUTH INC	CHRISTINE YERKES	5605 N MACARTHUR BLVD STE 1066 IRVING, TX 75038-2617
550	WOLFTEK MISSION GROUP, LLC	FRANK WATSON	20405 EXCHANGE ST STE 300 ASHBURN, VA 20147-5935
551	CCI ELECTRICAL CONTRACTORS, LLC	JOHN MORRISON	111 W 16TH AVE STE 448 ANCHORAGE, AK 99501-5169
552	CHENEGA MISSION OPERATIONS LLC	DAVID O'REAR	103 QUALITY CIR NW STE 200 HUNTSVILLE, AL 35806-4537
553	DAWSON CMS, LLC	ANITA FLIGGE	2750 PROSPERITY AVE STE 510 FAIRFAX, VA 22031-4338
554	PUYENPA CONSTRUCTION LLC	EMILY STOUT	9258 CULEBRA RD STE 140-8 SAN ANTONIO, TX 78251-2871
555	CHENEGA MISSION OPERATIONS LLC	DAVID O'REAR	1509 SAINT ANDREWS BLVD PANAMA CITY, FL 32405-2835
556	SES ENERGY SERVICES LLC	JOHN MORRISON	7217 LOCKPORT PL STE 201 LORTON, VA 22079-1584
557	POTAWATOMI DEFENSE OPERATIONS, LLC	AARON FINNIGAN	101 W BENSON BLVD STE 303 ANCHORAGE, AK 99503-3937
558	CETERIS INC	TREY GARDNER	125 N BROAD ST STE 209 THOMASVILLE, GA 31792-8126
559	KAIVA-SIGNATURE JV, LLC	CAMERON ECHOHAWK	6060 W 3650 N STE 800 IVINS, UT 84738-6826
560	KOMAN INTEGRATED SOLUTIONS, LLC	RUSSELL BORMAN	4900 CALIFORNIA AVE 2ND FL BAKERSFIELD, CA 93309-7024
561	FOUR TRIBES ENTERPRISES, LLC	DOYLE LOWRY	10475 CROSSPOINT BLVD. STE 206 INDIANAPOLIS, IN 46256-3387
562	UNAMI LLC	LAURA PONDER	9300 NORMANDY BLVD STE 510 JACKSONVILLE, FL 32221-5563
563	CCI ELECTRICAL CONTRACTORS, LLC	JOHN MORRISON	10101 GLOBAL WAY KNOXVILLE, TN 37932-3422
564	AJCE CORP	ANTHONY CISNEROS	132 CLYDE ST STE 1C WEST SAYVILLE, NY 11796-1927
			801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON

565	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	APART COND THE CITY SAN JUAN, PR 00901-
566	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
567	AIKO ENTERPRISES, INC.	BENJAMIN ARNOLD	384 HAROLD L DOW HWY UNIT 26 ELIOT, ME 03903-1411
568	AJCE CORP	ANTHONY CISNEROS	1920 BEN T JOHNS RD ALVATON, KY 42122-9698
569	AAECON GENERAL CONTRACTING LLC	MICHAEL LATHON	2 E BRYAN ST STE 510 SAVANNAH, GA 31401-2671
570	CIERRA GROUP INC.	JENNIFER CIERRA GOMEZ	10565 FAIRFAX BLVD STE 202 FAIRFAX, VA 22030-3104
571	JBW GROUP LLC	WES LANE	3501 HORACE AVE FORT WORTH, TX 76244-8663
572	MIG GOV, LLC	JOSE GUTIERREZ	1 PROFESSIONAL DR STE 9 PORT ROYAL, SC 29935-1104
573	REDFEATHER SOLUTIONS LLC	ALYSSA GARCIA	7400 CATFISH CT FALLON, NV 89406-7102
574	MARTIR, LLC	PAMELA MARTINEZ	399 1ST AVE HALETHORPE, MD 21227-3006
575	MIJA CONSTRUCTION SERVICES LLC	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133
576	ETOLIN STRAIT ASSOCIATES LLC	JAMIE VANEK	7440 CENTRAL BUSINESS PARK DR 104 NORFOLK, VA 23513-2827
577	SPECIALIZED TESTING AND CONSTRUCTION, INC.	HECTOR JOHN RODRIGUEZ	3908 WILLIAMSON RD, STE 140 CROWLEY, TX 76036-9203
578	AJCE - LEE JOINT VENTURE LLC	ANTHONY CISNEROS	8570 SW 127TH ST MIAMI, FL 33156-5819
579	OMEGA BELT BUILT JOINT VENTURE, LLC	BRUCE GAUNTT	2410 CERCA MADERA SAN ANTONIO, TX 78259-
580	MIDNIGHT SUN AUS, LLC	ELEANOR DAVIS	3201 C ST STE 801 ANCHORAGE, AK 99503-3934
581	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
582	PHD LLC	LEE RUDOLPH	4275 E 30TH PL STE B YUMA, AZ 85365-7570
583	MILSPEC CAPITAL PARTNERS INC.	FREDERICK KIM	201 HAY ST 401B FAYETTEVILLE, NC 28301-5582

584	CAPE FOX EXPEDITIONARY, LLC	SHANE MUNCY	14360 NEWBROOK DR STE 200 CHANTILLY, VA 20151-4206
585	FORTIS NATIVE GROUP LLC	JOSH HANCOCK	100 BROOKWOOD ROAD ATMORE, AL 36502-3513
586	TEYA MANAGEMENT SERVICES LLC	ANDY NEWTON	101 E 9TH AVE STE 9B MS-06 ANCHORAGE, AK 99501-3651
587	TEYA DIVERSIFIED SERVICES LLC	ANDY NEWTON	101 E 9TH AVE STE 9B MS-07 ANCHORAGE, AK 99501-3651
588	AHTNA BUILDERS, LLC	BERNARD WONG	1100 N LITTLE BROOK LN STE A-100 PALMER, AK 99645-8931
589	ACE INDUSTRIAL FLOOR COATINGS L.L.C.	SCOTT GUAJARDO	17715 WOODSIDE ST LIVONIA, MI 48152-2743
590	AIR RITE HVAC INC	FABIO ZOCANTE	1 IYANNOUGH RD HYANNIS, MA 02601-2026
591	E-QUAL CONSTRUCTION LLC	ERIKA FLORES	3 CHAD RD PERALTA, NM 87042-8486
592	CHEYANNE, INC.	HOLLIE TOWE	5713 12TH AVE E UNIT 1 TUSCALOOSA, AL 35405-5131
593	CINKA CONSTRUCTION AND CONSULTING SERVICES LLC	CYNTHIA MARTIN	11746 LAKEWAY DR CURTICE, OH 43412-9411
594	PMP/GBAB JV, LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314
595	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
596	CNE-GLOBAL COM JV LLC	JAE KANG	27345 AQUIA PATH DR COURTLAND, VA 23837-2195
597	INTERNATIONAL GLASS & MIRROR INC	GINO BARANELLO	14014 SW 140TH ST MIAMI, FL 33186-5547
598	HCP FEDERAL, LLC	PHILIP HINOJOSA	310 BREESPORT ST STE B SAN ANTONIO, TX 78216-2628
599	LOGAN CURRITO, LLC	CHAN PARK	435 MAIN ST # 200 WOBURN, MA 01801-4239
600	CHUGACH PACIFIC SOLUTIONS LLC	WILLIAM MARTZ	189 E SIKET ST DEDEDO, GU 96929-
601	BRICE PACIFIC LLC	ROBERT CHAMPION	3700 CENTERPOINT DR STE 8154 ANCHORAGE, AK 99503-5800
602	TMSAB LLC	ANDY NEWTON	101 E 9TH AVE STE 9B ANCHORAGE, AK 99501-3651

603	FAR SOLUTIONS LLC	JEFFREY HINDERS	3301 N BUFFALO DR STE 120 LAS VEGAS, NV 89129-7450
604	TEYA SUPPORT SERVICES LLC	RON PERRY	1737 LEE RD 10 AUBURN, AL 36832-8053
605	URBAN STACK	KADI KOHEA	76 6386 PUALANI ST KAILUA KONA, HI 96740-
606	MUNICIPAL BASE SERVICES LLC	LINWOOD BURDEN	1124 WALNUT ST JACKSONVILLE, FL 32206-5138
607	ACCESS MW LLC	ANA ESPINOZA	198 PALOMA MESA RD ANTHONY, NM 88021-8640
608	RMS NICKLAUS JV, LLC	JOHN VARGAS	2143 MONMOUTH DR VENTURA, CA 93001-3801
609	MILESTONE JV, LLC	STACEY MYERS	5000 LETTERKENNY RD STE 280 CHAMBERSBURG, PA 17201-8384
610	MANUNOA, LLC	KENDIS KADO	9375 CHESAPEAKE ST STE 207 LA PLATA, MD 20646-3654
611	MAYORGA CONSTRUCTION GROUP LLC	ANGELO MAYORGA	243 DOGWOOD DR PENSACOLA, FL 32505-5375
612	A-1 SHEFFIELD TEAM LLC	ANDRES BECERRA	100 SE 2ND STREET, SUITE 2000 MIAMI, FL 33131-2101
613	JBW FEDITC JV LLC	MATT ALBERT	14603 HUEBNER RD STE 3002 SAN ANTONIO, TX 78230-5527
614	JBW SAC JV LLC	RYAN HASH	3501 HORACE AVE FORT WORTH, TX 76244-8663
615	JBW STRATTON LLC	WES LANE	15035 N 73RD STREET SUITE B SCOTTSDALE, AZ 85260-2435
616	LAKOTA FEDERAL, LLC	COURTNEY ADDIE	315 LINCOLN ST STE 300 SITKA, AK 99835-7579
617	S&P CONSTRUCTION MANAGEMENT INC.	SOHAIL KHAN	1975 HEMPSTEAD TPKE STE 210 EAST MEADOW, NY 11554-1703
618	JOURNEY VAZQUEZ JV 2 LLC	BARBARA SMITH	7660 PRODUCTION DR CINCINNATI, OH 45237-3209
619	TORAH FEDERAL SYSTEMS LLC	ROBERT PHILLIPS	2948 COUNTY ROAD 377 STE 2 ELBA, AL 36323-7088
620	ARETE JV	KYLE TE	220 E DUNKLIN ST JEFFERSON CITY, MO 65101-3127
621	PARADIGM CCW JV LLC	BRANDON CURTIS	5110 N 40TH ST STE 254 PHOENIX, AZ 85018-2191
622	JVR SOUTHBAY LLC	JAVIER VILLARREAL	13729 E RAY RD GILBERT, AZ 85296-4009

623	SATURN ENTERPRISES, INC.	MARIA MENZIES	27 YORK DR FORT WORTH, TX 76134-2546
624	PDO AHUSAKA JV III LLC	AARON FINNIGAN	3215 W STATE ST STE 309C1 MILWAUKEE, WI 53208-3364
625	MIDNIGHT SUN-GLENMAR JV	JOHNNY JEPPESEN	3201 C ST STE 801 ANCHORAGE, AK 99503-3934
626	TAKOTA FLATS-SEG JV LLC	WAYNE LOPEZ	35734 PARKLAWN CT ROUND HILL, VA 20141-4414
627	UNALAKLEET-WQRI JV, LLC	CONRAD CELESTIAL	300 E QUEEN ST CHAMBERSBURG, PA 17201-2324
628	CHENEGA SUPPLY CHAIN SOLUTIONS, LLC	PAUL NESBIT	609 INDEPENDENCE PKWY STE 210 CHESAPEAKE, VA 23320-5209
629	SUH'DUTSING-PILKINGTON CONSTRUCTION JV II, LLC	CARLA SANCHEZ	600 N 100 E STE N CEDAR CITY, UT 84721-3807
630	EASTHILL KUNJ JV, LLC	VEDANT BHANDERI	17 ACADEMY ST STE 515 NEWARK, NJ 07102-2932
631	M&T - RIGHT WAY, JV LLC	JUAN MORALES PADILLA	CARR. 152 KM. 15.8 INTERIOR, BO. CEDRO ABAJO, SECTOR LOS PAGANES NARANJITO, PR 00719-
632	CNE-SIGNATURE JV2 LLC	JAE KANG	27345 AQUIA PATH DR COURTLAND, VA 23837-2195
633	ARROWHEAD CONTRACTING, INC OF FLORIDA	RYAN FRAZIER	900 MARKET ST STE 209 SHREVEPORT, LA 71101-3761
634	UNALAKLEET-INTEGRIWARD JV, LLC	DIANA DAVIS	300 E QUEEN ST CHAMBERSBURG, PA 17201-2324
635	T&M SERVICE GROUP, LLC	ERIC TORRENCE	5752 NC HIGHWAY 41 W TRENTON, NC 28585-5562
636	RYMARK-S&S JOINT VENTURE LLC	TRAVIS PEREZ	19901 JODI DR LUTZ, FL 33558-5005
637	MILL CREEK FIRELAKE JV LLC	ROCKELL OTERO	19035 US HIGHWAY 75 HOLTON, KS 66436-8101
638	DBRA-FSC JV LLC	DERAGE ALEMAYEHU	9421 WOODED GLEN AVE BURKE, VA 22015-4231
639	MIDNIGHT SUN FEDERAL CONSTRUCTION, LLC	JOHNNY JEPPESEN	3201 C ST STE 801 ANCHORAGE, AK 99503-3934
640	MOUNTAIN POINT, LLC	JASON BROWN	106 DIXIE LN COCOA BEACH, FL 32931-3542
641	VALKYRIE MECHANICAL JV LLC	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
			400 CHRISTY LN

642	COVINGTON FIRELAKE JV, LLC	KATHLEEN CAFFEY	ANDALUSIA, AL 36420-8850
643	CINTEOT INC.	THOMAS HUNT	3000 PRESIDENTIAL DR STE 170 FAIRBORN, OH 45324-6817
644	PUYENPA-IMMERSIVE JV, LLC	EMILY STOUT	511 DUCKWATER FALLS RD DUCKWATER, NV 89314-9800
645	ET&T JV, LLC	KATHLEEN TOWNSEND	7212 LOCKPORT PL OFC B49 LORTON, VA 22079-1525
646	TLI-ACE CO JV, LLC	CYNTHIA LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
647	DAWSON MCG, LLC	DEREK MAR	155 N LAKE AVE 8TH FLOOR, #887 PASADENA, CA 91101-1849
648	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133
649	FOUR TRIBES CIVIL CONSTRUCTION, LLC	DOYLE LOWRY	135 N VICTORY BLVD STE 9 BURBANK, CA 91502-1837
650	ROD TRANSPORT INC.	STEVEN RODRIGUEZ	4051 HOVNANIAN DR SACRAMENTO, CA 95834-7501

#	Name of Firm	Contact	Address and City, State Zip
1	SOUTHERN SAFETY SUPPLY LLC	SARA SIZEMORE	207 CENTER PARK DR STE 2090 KNOXVILLE, TN 37922-2136
2	BAKER & ASSOCIATES INC	LEANNE BROWN	60 COMPARK RD DAYTON, OH 45459-4802
3	ECTRON CORP	KARY DODD	9340 HAZARD WAY SUITE B2 SAN DIEGO, CA 92123-1228
4	IDEAL SYSTEM SOLUTIONS INC	CAROL IRISH	4646 MAIN ST PEQUOT LAKES, MN 56472-4405
5	STREET LEGAL INDUSTRIES, INC	LISA BISESE	102A JEFFERSON CT OAK RIDGE, TN 37830-4821
6	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
7	AMERICAS BEST ELECTRICMART INC	DAVID HICKS	129 W HARMON INDUSTRIAL PARK RD STE D TAMUNING, GU 96913-4166
8	MERCOM, INCORPORATED	DUSTIN FUGETT	1067 PETIGRU DR PAWLEYS ISLAND, SC 29585
9	BRUCE'S ELECTRIC, INC	BARBARA WALKER	7447 BEATLINE RD LONG BEACH, MS 39560-8802
10	COLLINS CONSTRUCTION SERVICES, INC	DAWN MORGAN	2135 ROWLAND AVE SUITE C SAVANNAH, GA 31404-4422
11	CAN'T BE BEAT FENCE AND CONSTRUCTION, LLC	MEREDITH ANDERSON	2204 HIGHWAY 53 PERKINSTON, MS 39573-3910
12	ADVANCED COMMUNICATION CABLING INC	RUTH FRITZ	35 BEACHVIEW LN FALLS OF ROUGH, KY 40119-7576
13	SILER EXCAVATING LLC	TAMMY SILER	1075 HILL ST JELLICO, TN 37762-2358
14	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992
15	JACK WAYTE CONSTRUCTION CO., INC	REGINA BABCOCK	7043 HIGHWAY 54 70 ALAMOGORDO, NM 88310-9138
16	PELICAN SALES INC	JOE GIANNACCO	2825 BUSINESS CENTER BLVD STE C9 MELBOURNE, FL 32940-7193
17	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404

18	EL PASO J.A.G., INC.	ALEX CASTRO	3750 DURAZNO AVE EL PASO, TX 79905-1302
19	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST SAN DIEGO, CA 92121-1544
20	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
21	ASPHALT PLUS, INC.	MELINDA OEDEKOVEN	425 JOHNSON LN BILLINGS, MT 59101-6714
22	ALEXTON INCORPORATED	SOPHIA MARNELL	8210 CINDER BED RD STE 2 LORTON, VA 22079-1136
23	COMPETITIVE CHOICE, INC	AUNDREA YOUNG	9030 KIRBY DR HOUSTON, TX 77054-2504
24	KAU INC	KATHRYN WALDRON	4208 ROSEMONT LN FREDERICKSBURG, VA 22408-1962
25	MHK TECHNOLOGIES INC	SUSAN ROACH	225 VINE ST STE 1 JOHNSTOWN, PA 15901-1518
26	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	401 HANOVER ST FREDERICKSBURG, VA 22401-5936
27	ONEILL CONTRACTORS INC	KANEY ONEILL	4307 REGENCY DR GLENVIEW, IL 60025-5209
28	GLOBE BUILDERS, INC.	ANGELINA RODRIGUEZ CHAVEZ	3009 PERSHING DR APT 1 EL PASO, TX 79903-2534
29	ATWOOD HAY INCORPORATED	GLENDA HAY	321 ALTA VISTA AVE ROSEVILLE, CA 95678-1701
30	TRI COAST CONSTRUCTION, LLC	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
31	PANORAMA CONSULTING, INC.	SAMANTHA MCDANIEL	728 LAKE DR LAUREL HILL, FL 32567-3169
32	EDGE SOLUTIONS LLC	ALICE REDDING	1523 ROYAL SPRINGS ST FAYETTEVILLE, NC 28312-9504
33	ANNA LISA LUNA CONSTRUCTION, INC.	ANNA LUNA	1250 CRUZERO ST OJAI, CA 93023-3819
34	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
35	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
36	KELLY CONSTRUCTION SERVICES INC.	KELLY FISHER	55 MAIN ST STE 5102A ENFIELD, CT 06082-3359

37	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839
38	CLAYTON CO CONSULTANTS LLC	ANNIE CLAYTON	2033 FLESHER AVE JACKSONVILLE, FL 32207-3519
39	MAGADIA CONSULTING INC	MAGDALENA GEBREKRISTOS	1734 ELTON RD STE 200 SILVER SPRING, MD 20903-5717
40	MV7 INC	JACQUELINE MATTIACCIO	8804 FIELDFLOWER LN TAMPA, FL 33635-6258
41	GALE CONSTRUCTION COMPANY OF ILLINOIS	LAURA PAGER	51 W JACKSON ST STE 230 JOLIET, IL 60432-1729
42	WEST PACIFIC ELECTRIC COMPANY CORPORATION	VIRGINIA VILLA	290 EL PORTAL DR PISMO BEACH, CA 93449-1504
43	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
44	8-KOI INC	INGA YOUNG	2725 CENTER PLACE MELBOURNE, FL 32940-7106
45	GCJ INC	GINGER SEPULVEDA	3508 SHAMROCK WAY STE 101 TRACY, CA 95377-9204
46	OUTSIDE BOX LLC	CANDICE SOMERVILLE	1428 FLOYD AVE RICHMOND, VA 23220-4618
47	CITI APPROVED ENTERPRISE, LLC	INGRID THIBODEAUX	2439 MANHATTAN BLVD STE 5052 HARVEY, LA 70058-5328
48	HOSPITALITY LOGISTICS CONCEPT LLC	BASSEL SHUBASSI	9951 OAKTON TERRACE RD OAKTON, VA 22124-2939
49	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609
50	DYNAMIK, INC.	JESSE FELTEN	3990 OLD TOWN AVE, SUITE C107 SAN DIEGO, CA 92110-2968
51	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
52	D&S INTERNATIONAL, LLC	MARLENE CAMAN	5004 BRIGHTON AVE KANSAS CITY, MO 64130-3109
53	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST STE A SAN DIEGO, CA 92121-1544
54	ADELAIDE SERVICES LLC	SELENA ALEMAN	118 BROADWAY ST STE 614 SAN ANTONIO, TX 78205-2007
55	EACM CORP	SOLANGIE ARROYO	20 MERIDIAN RD STE 1 EATONTOWN, NJ 07724-2270
			143 ESSEX ST

56	US ECO PRODUCTS CORP	DOREEN BLADES	STE 210 HAVERHILL, MA 01832-5553
57	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
58	COMP ENVIRONMENTAL, INC.	YANLING CAROLINE WANG	5615 RECKER HWY WINTER HAVEN, FL 33880-1267
59	BATIR ARCHITECTURE LTD	PAULA PRICE	1121 E MAIN STREET SAINT CHARLES, IL 60174-2205
60	AMALGAMATED SERVICES, INC.	KAREN RIFFICE	21024 S 80TH AVE FRANKFORT, IL 60423-9186
61	JCJ CHAVEZ CONSTRUCTION INC	MARILUPE CHAVEZ	115 S GOLD CANYON ST RIDGECREST, CA 93555-4121
62	M&K GENERAL CONTRACTORS INC	KARLA FRESE	1368 WOODEN VALLEY ST CHULA VISTA, CA 91913-2936
63	THE GEMINI 3 GROUP, INC.	LINDA BLAKEMORE	50 TECH PKWY STE 107 STAFFORD, VA 22556-8615
64	ABHZEEN DESIGN INC	BHAVESH NAIK	34 SCHOOL RD E MARLBORO, NJ 07746-2056
65	GC GREEN, INCORPORATED	ELIZABETH PEREZ	102 SHELL DR SAN CLEMENTE, CA 92672-3652
66	SERVITECH, INC.	JIM BARKER	13892 E SMITH DR AURORA, CO 80011-2248
67	K WATSON GROUP LLC	KAREN WATSON	10834 OLD MILL RD STE 4 OMAHA, NE 68154-2648
68	GENECO TECHNOLOGIES, LLC	AMYE AMERINE	236 AIR BASE RD TYE, TX 79563-2322
69	FOUR WINDS MECHANICAL HTC/AC INC.	CHAULING ARMIJO	8915 ADAMS ST NE STE B ALBUQUERQUE, NM 87113-2714
70	FIRELAKE CONSTRUCTION INC	JACKIE FOLEY	1011 E 31ST ST LAWRENCE, KS 66046-5103
71	BGESH INCORPORATED	WESTON HALLIBURTON	21943 DIAMOND CHASE STE 200 SAN ANTONIO, TX 78259-2743
72	GRANITE COMMERCIAL REAL ESTATE LLC	MEGAN PRIETO GIOKAS	30 TEMPLE ST STE 300 NASHUA, NH 03060-2412
73	BRENCO SUPPLY, INC.	KAREN LOYD	210 DAVIDSON DR STE B HOT SPRINGS NATIONAL PARK, AR 71901-9331
			718 18TH ST

74	SITE MANAGEMENT ASSISTANCE LLC	KIMKO DOWELS	MERIDIAN, MS 39301-3547
75	BECKRICH CONSTRUCTION, LLC.	JEFF RICHARDS	8855 WHISPERING PINE TRL COLORADO SPRINGS, CO 80908-3514
76	ACCENTZ, INC.	FARHA KHAN	6695 S QUEMOY CIR AURORA, CO 80016-2686
77	SUNAGO SUPPLY CORPORATION	ETTA TUCKER	2914 VILLA LAKE DR POWDER SPRINGS, GA 30127-5049
78	CM CONSTRUCTION SERVICES, INC.	MONIQUE MIRON	8300 W DOE AVE VISALIA, CA 93291-9261
79	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	2026 S CALLAGHAN RD SAN ANTONIO, TX 78227-2265
80	THE PLUMBING SHOP, INC	PERIDOT DAVIS	1121 FLAMINGO DR AUSTELL, GA 30168-6109
81	CINTEOT INC.	CHRISTINA HUNT	75 S MAIN ST CHAMBERSBURG, PA 17201-2224
82	CHAD PODY CONSTRUCTION COMPANY, L.L.C.	ANGELA PODY	275 GOODGOIN RD RUSTON, LA 71270-8730
83	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
84	PROSPERITUS SOLUTIONS LLC	KRYSTAL NERIO	1014 PEABODY AVE SAN ANTONIO, TX 78211-2844
85	ASPIRYON LLC	NEIL CRISMAN	7600 CHEVY CHASE DR SUITE 300 AUSTIN, TX 78752-1599
86	MINATOISHI PALUMBO ARCHITECTS, INC.	LORRAINE MINATOISHI	1003 BISHOP ST STE 1975 HONOLULU, HI 96813-6461
87	IDEAL SYSTEM SOLUTIONS, INC.	SHELIA HERSHEY	12 ROCKY SLOPE DR SANTA FE, NM 87508-1353
88	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
89	CIN-G CONTRACTING LLC	CINDY GONZALES	5285 W LOUISIANA AVE LAKEWOOD, CO 80232-5938
90	SUGAR SHORES CONSTRUCTION LLC	TAMESHA EVERS	14 LIVE OAK ST STE A7 GULF BREEZE, FL 32561-4484
91	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
92	HD INC.	JANET HURLEY	6391 AVIATION CIR LOVELAND, CO 80538-9000
93	PREMIER MECHANICAL PRODUCTS LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314

94	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
95	MSAB, LLC	LAURA KNIGHT	400 PERRY PKWY PERRY, GA 31069-9246
96	DARBONNIER TACTICAL SUPPLY LLC	BRITTNI DARBONNIER	951 NE 21ST CT OAK HARBOR, WA 98277-2715
97	SAWYER SERVICES INC	KIM SAWYER	56851 GRATIOT AVE CHESTERFIELD, MI 48051-1308
98	BEST VALUE MANAGEMENT, LLC	BRENDA CAMPBELL	1225 W BEAVER ST STE 12306 JACKSONVILLE, FL 32204-1414
99	ARMITAGE ARCHITECTURE INC.	PENNY ARMITAGE	6512 MAIN ST WILLIAMSVILLE, NY 14221-5836
100	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
101	COMP ENVIRONMENTAL INC	CAROLINE WANG	4701 SANGAMORE RD STE N100 BETHESDA, MD 20816-2558
102	DREAM DESIGN & CONSTRUCTION, INC	LEANN WILKES	1101 IDLEWILD AVE GREEN COVE SPRINGS, FL 32043-3903
103	PAULSON PLUMBING & MECHANICAL, LLC	PAULETTE BACA	1211 4TH ST SW ALBUQUERQUE, NM 87102-4368
104	BLOOMSBURIE LLC	KINHA LESTER	3542 N UTAH ST ARLINGTON, VA 22207-4444
105	VANGUARD PACIFIC LLC	SYDNEY CODY	14051 COUNTY ROAD 9 FOLEY, AL 36535-8318
106	ADAPT CONSULTING LLC	LISA LOWERY	598 REDWOOD RD SARATOGA SPRINGS, UT 84045-9603
107	JIM JAM, INC.	JAMES GALLET	11003 W 59TH TER SHAWNEE, KS 66203-2956
108	GRENLAR HOLDINGS, INC	KALEN GRENZEBACH	16636 SIMONDS RD NE KENMORE, WA 98028-4413
109	MIA GENERAL CONTRACTING LLC	BRANDY DODD	4221A HIGHWAY 90 MILTON, FL 32571-2011
110	MX CONSTRUCTION, INC.	TIFFANY AMEZCUA	720 S FRONTAGE RD STE 106 NIPOMO, CA 93444-5626
111	SH MECHANICAL INC.	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
			404 HAUPT SQ SE

112	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	LEESBURG, VA 20175-2722
113	WITHIN INTERIOR DESIGN, INC.	Heather Robinson	205 N WATER ST ELIZABETH CITY, NC 27909-4417
114	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	504 CAPITAL CIR SE STE A TALLAHASSEE, FL 32301-3807
115	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
116	ADDON SERVICES LLC	PRITA ABRAHAM	300 MEMORIAL FIELD DR HOPKINSVILLE, KY 42240-8075
117	Z SQUARED BUILDERS INC.	LOURDES MALAEKEH	5039 ROBERT J MATHEWS PKWY # 400 EL DORADO HILLS, CA 95762-5752
118	TITAN ASSOCIATES GROUP INC.	TANYA LEONARD	1891 INGLESIDE AVE ATHENS, TN 37303-2193
119	GWO, INC.	MIRION GREEN	832 CAMBRIDGE AVE MATTESON, IL 60443-1855
120	TERA CONSULTING INC.	KHURRAM BAJWA	29 ELVES LN LEVITTOWN, NY 11756-5522
121	DOFINE SPRINKLER REBUILDERS INC	DALLES DUFFIN	218 W 13TH ST BURLEY, ID 83318-1602
122	LD SUPPLY, LLC	LISA D'ALESSIO	925 HALE PL STE A6 CHULA VISTA, CA 91914-3507
123	RIVETER ENTERPRISES	CARLA STEPHANY	919 W CUCHARRAS ST STE 130 COLORADO SPRINGS, CO 80905-1646
124	NRK CONSTRUCTION, LLC	NORISHA GLOVER	700 N 10TH ST STE 200 BATON ROUGE, LA 70802-4508
125	EMPOWER CONTRACTING INC.	YOLANDA VALDES	1361 BROOKLYN BLVD BAY SHORE, NY 11706-4008
126	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
127	GLOBAL QUALITY SOLUTIONS, INC.	ADRIANA BLANKENSHIP	7235 BENTLEY RD STE 930 JACKSONVILLE, FL 32256-7565
128	OUTSIDE THE BOX LLC	CANDICE SOMERVILLE	433 EXETER DR BIRMINGHAM, AL 35206-2845
129	NISOU ENTERPRISES INC	NIHARIKA SHASTRI	37279 ASPEN DR FARMINGTON HILLS, MI 48335-5479
130	GULF COAST SOLUTIONS LLC	YVETTE BREAZEALE	12300 BIG CREEK RD GULFPORT, MS 39503-7306
			91-1012 IPOLANI ST APT A

131	MASHIMA ELECTRIC LLC	KATHRYN MASHIMA	KAPOLEI, HI 96707-3062
132	COX-MORGAN & ASSOCIATES, LLC	DONETH MORGAN	6015 CHESTER CIR STE 202 JACKSONVILLE, FL 32217-2273
133	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
134	NATIVE STAR GROUP, INC	JOSH PETERSON	17406 E 425 RD JAY, OK 74346-3735
135	MAKRO CORP.	LAURA GONZALEZ	1761 CARR 8838 SAN JUAN, PR 00926-2741
136	NV SERVICES LLC	NEYSSA VARELA	URB. LAS LOMAS BLOQUE U3 #3 SAN JUAN, PR 00921-
137	COMP ENVIRONMENTAL INC	YANLING CAROLINE WANG	6731 WHITTIER AVE STE B-230 MC LEAN, VA 22101-4525
138	RNN ARCHITECTS, INC	REBECA ARISTIZABAL	2930 S WOLFF ST DENVER, CO 80236-2013
139	CONTRACTING & COMMUNICATIONS SERVICES, INC.	GINA TYSHING	107 ENGLEFIELD DR GAITHERSBURG, MD 20878-2661
140	BUCKET PRO LLC	CHEYENNE BROOKS	1898 BUFFALO ST OLEAN, NY 14760-1142
141	QUEST POWER INTERNATIONAL, LLC	PATRICIA ARAUZ-CORROW	36 W PINE ST STE 202C ORLANDO, FL 32801-2612
142	BLUE CONSTRUCTION SERVICES LLC	SEPTEMBER BLUE	633 YORK LN SE LEESBURG, VA 20175-4017
143	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
144	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	615 BARONNE ST STE 205 NEW ORLEANS, LA 70113-1016
145	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	4203 WOODCOCK DR STE 265 SAN ANTONIO, TX 78228-1312
146	CINKA CONSTRUCTION & CONSULTING SERVICES LLC	CYNTHIA MARTIN	307 SAINT KITTS LOOP SAINT AUGUSTINE, FL 32092-1181
147	KERNS CONSTRUCTION, LLC	ASHLEI KERNS	5366 W PECAN RD LAVEEN, AZ 85339-2456
148	VANGUARD PACIFIC LLC	SYDNEY CODY	2207 GARNET AVE STE N SAN DIEGO, CA 92109-3713
149	ILLUSTRIOUS CONSULTANTS, LLC	KAHLIA MEEKS	2106 RENAISSANCE WAY NE ATLANTA, GA 30308-2461
	DIAMOND CAPTURE ASSOCIATES		8192 LOST CREEK LN

150	LLC	BARBARA RIVERA	DELRAY BEACH, FL 33446-0022
151	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
152	CEDAR PARK GROUP INC	SAMANTHA TERLINE	2 LAWSON AVE UNIT 11 EAST ROCKAWAY, NY 11518-1700
153	DUMOUR SERVICES LLC	JACQUELINE PERKINS	201 CRATER WOODS CT PETERSBURG, VA 23805-9100
154	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
155	GIACORP CONTRACTING INC	LISA WALTER CALICCHIA	11 BRADHURST AVE HAWTHORNE, NY 10532-2135
156	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
157	PED CONCEPTS INC.	KELLEY PITTMAN	10752 DEERWOOD PARK BLVD SOUTH WATERVIEW II STE 100 JACKSONVILLE, FL 32246-
158	BROOKES CONSTRUCTION LLC	CHISA BROOKES	3202 WILKINSON BLVD #667492 CHARLOTTE, NC 28208-5659
159	STILES GENERAL CONTRACTORS LLC	ADELIZ STILES	6505 ANGORA LOOP ST S EL PASO, TX 79934-
160	COPELAND CONTRACTING COMPANY INC	ELSA NIEVES BROWN	1425 UNIVERSAL CITY BLVD BLDG 3 SAN ANTONIO, TX 78148-3364
161	RENO/TAHOE REALTY GROUP LLC	SARAH CARMONA ZINK	232 ANACAPA ST STE 2C SANTA BARBARA, CA 93101-1841
162	L.J.V. DEVELOPMENT, LLC	LISETH VELEZ	50 MILK ST FL 16 BOSTON, MA 02109-5002
163	SEAMAN GROUP LLC	ANGELA SEAMAN	7775 FIREFALL WAY APT 1532 DALLAS, TX 75230-7312
164	SPEARS CONSTRUCTION GROUP INC	KAREN SPEARS	7688 SW JACK JAMES DR STUART, FL 34997-7239
165	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	111 N ORANGE AVE STE 1020 ORLANDO, FL 32801-2399
166	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
			3501 HOLIDAY DR STE 311

167	NIKKI'S ETC. L.L.C.	NAKIA JONES	NEW ORLEANS, LA 70114-8283
168	NOVA BUILDING SOLUTIONS LLC	NADINE VILLANUEVA	27103 E ONTARIO PL AURORA, CO 80016-7514
169	ADAPT CONSULTING LLC	LISA LOWERY	17645 E OLD CHERRY RD DEWEY, AZ 86327-7315
170	ADDON SERVICES LLC	PRITA ABRAHAM	1800 DIAGONAL RD STE 600 ALEXANDRIA, VA 22314-2840
171	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
172	GLOBAL QUALITY SOLUTIONS, INC.	Adriana Blankenship	4525 S SANDHILL RD STE 103 LAS VEGAS, NV 89121-5955
173	AXC INNOVATIONS INC	ANH THU DOAN	1312 E GUAVA AVE LOMPOC, CA 93436-6213
174	E.K. MANAGEMENT, L.L.C.	EDNA KEEFE	909 EMILY CIR FORT WALTON BEACH, FL 32547-1980
175	AANTILIA LLC	PRIYAL AGRAWAL	701 TILLERY ST STE 12 AUSTIN, TX 78702-3751
176	HD INC	JANET HURLEY	3116 E LYNDALE AVE HELENA, MT 59601-6445
177	M.K. MOORE & SONS, INC	ANTHONY MOORE	5150 WAGNER FORD RD DAYTON, OH 45414-3662
178	VANGUARD PACIFIC LLC	SYDNEY CODY	119 W GARDEN ST PENSACOLA, FL 32502-5617
179	NORTHERN STONE CARVING LLC	MARGARET MOORE	211 SAINT ANTHONY PKWY STE B9 MINNEAPOLIS, MN 55418-4862
180	TLI CONSTRUCTION, INC.	CINDY LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
181	SILVER-SMITH DEVELOPMENT, LLC	PAMELA JONES-SMITH	1196 CAPITAL CIR NE STE A TALLAHASSEE, FL 32301-3531
182	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	5470 S MONROVIA AVE TUCSON, AZ 85706-2120
183	AVANTE CONSTRUCTION INC	YOKO LARKIN	9380 ACTIVITY RD STE J SAN DIEGO, CA 92126-4413
184	CFS MEDICAL SUPPLIES AND EQUIPMENT, INC	TARA SLAUGHTER	2114 REDONDO BEACH BLVD TORRANCE, CA 90504-1616
185	MJAG CONSTRUCTION SERVICES, LLC	FELICIA WHITE	10019 S 10TH ST BELLEVUE, NE 68123-4014
			151 ROSE ST

186	COMMERCIAL CONTRACTORS LLC	AMY TAMANAHA	APT A WAHIAWA, HI 96786-2365
187	DONNATHEPILOT, LLC	DONNA ENGELBRECHT	6 FAIRWAY RD JACKSONVILLE BEACH, FL 32250-2635
188	BUSINESS PREP, LLC	MONIQUE MUNRO	5159 POOKS HILL RD APT 1410 BETHESDA, MD 20814-5605
189	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431
190	BLUE, ELAINE	ELAINE BLUE	1545 QUADRILLE CT RIVERSIDE, CA 92503-7221
191	TRUEDGE SOLUTIONS, LLC	SUNG CHOI	744 CALABRIA LANE AMBLER, PA 19002-1539
192	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
193	JMC HOMES & GENERAL CONTRACTING, LLC	RHONDA CAGLE	390 RACETRACK RD MCDONOUGH, GA 30252-1022
194	OSPREY ADVANTAGE SOLUTIONS LLC	MARIA CARO	133 RIVER RUN QUEENSTOWN, MD 21658-1642
195	PARKER CONSTRUCTION ENTERPRISES INC	JULIETTE PARKER	5284 GOLD TREE CT ORLANDO, FL 32808-1772
196	MAUKA CONTRACTING LLC	AMBER STRONG	3084 POIPU RD KOLOA, HI 96756-9573
197	FREEDOM FLEUR LLC	KIRSTIE HORTON	1033 DEMONBREUN ST STE 300 NASHVILLE, TN 37203-4512
198	LOPEZ-GUERRA CONSTRUCTION LLC	CAMILA RICH	8400 OSUNA RD NE STE 3A ALBUQUERQUE, NM 87111-2070
199	ADDON SERVICES LLC	PRITA ABRAHAM	124 KAULANA WAY HONOLULU, HI 96821-2531
200	BGM HOMES LLC	JASMINE THORNTON	2801 LOIS LANE ROWLETT, TX 75088-4955
201	FREEDOM CONSTRUCTION AND CONSULTING INC.	BRENDAN TULLY	1015 GODFREY AVE SW GRAND RAPIDS, MI 49503-5005
202	TLI CONSTRUCTION, INC.	CYNTHIA LINCICOME	7900 EAST UNION AVENUE SUITE 1100 DENVER, CO 80237-2746
203	LSHADDAI CONSULTING LLC	CHIQUITA SPEARS	5404 RUE NICOLE BAKER, LA 70714-8017

204	TEFERA INVESTMENT GROUP LLC	ROSEMARY TEFERA	125 SW CAMPUS DR APT 1106 FEDERAL WAY, WA 98023-8313
205	RED HILLS PARTNERS LLC	MELISSA OGLESBY	7805 BRIARCREEK RD N TALLAHASSEE, FL 32312-3661
206	G.M. HILL ENGINEERING, INC.	GINA HILL	283 CONSTITUTION DR SUITE 903 VIRGINIA BEACH, VA 23462-6722
207	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
208	YERKES SOUTH INC	CHRISTINE YERKES	5605 N MACARTHUR BLVD STE 1066 IRVING, TX 75038-2617
209	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
210	VIRTUAL ACCOUNTING GROUP INC	FABIENNE GLEMAUD	5907 HEAVENWOOD DR SE MABLETON, GA 30126-3689
211	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
212	FM CIBORT LLC	FRANK CIBORT	752 CHAMBERS ST HARRISBURG, PA 17113-1705
213	CIERRA GROUP INC.	JENNIFER CIERRA GOMEZ	10565 FAIRFAX BLVD STE 202 FAIRFAX, VA 22030-3104
214	ROYAL T SERVICES LLC		
215	REDFEATHER SOLUTIONS LLC	ALYSSA GARCIA	7400 CATFISH CT FALLON, NV 89406-7102
216	GILL SQUARED FOR VETS LLC	MICHELLE GILL	200 GILL DR CLINTON, MS 39056-9643
217	RDMC LLC	VALERIE GRAVES	10563 WESTCLIFF PL HIGHLANDS RANCH, CO 80130-6916
218	KRAEMER CONTRACTING GROUP, INC.	CHRISTINE KRAEMER	603 COUNTRY CLUB DR STE A BENSENVILLE, IL 60106-1329
219	GLOBAL BEAMS INC.	ATIQA BHATTI	138 W. ARBOR CAMP CIR SPRING, TX 77389-5323
220	SUPPLY ON THE GO LLC	ROSSANNA CAMURUNGAN	3186 STATE ROUTE 27 STE 106 KENDALL PARK, NJ 08824-1513
			11228 STAGESTONE WAY

221	ALH DYNAMICS LLC	IMAN HOLMES	MANASSAS, VA 20109-7620
222	PROPERTY SCOPE INC	ANN FANGMAN	324 E MAIN ST UNIT 301 LOUISVILLE, KY 40202-1288
223	ADDON SERVICES LLC	PRITA ABRAHAM	27789 MOUND RD STE 200 WARREN, MI 48092-2697
224	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
225	PHD LLC	LEE RUDOLPH	4275 E 30TH PL STE B YUMA, AZ 85365-7570
226	AC GREEN LLC	CLAIRE GREEN	6648 HUDNELL RD ATHENS, OH 45701-8952
227	C&R CONTRACTORS LLC	CAROL CANTRELL	1499 TRESTLE CV HORN LAKE, MS 38637-8525
228	NO SWEAT KC LLC	MISTY DIXON	1451 NW 800TH RD HOLDEN, MO 64040-8419
229	GREEN STAR TECH LLC	SELAM DESTA	722 E MARKET ST STE 102 #V56 LEESBURG, VA 20176-4475
230	THE MAINSITE GROUP CORPORATION	KANDICE MERRICK	1507 MCARTHUR DRIVE DUNCANVILLE, TX 75137-4221
231	TYNES PROPERTY MANAGEMENT LLC	KANDICE TYNES	1878 GRANDSTAND DR SAN ANTONIO, TX 78238-4507
232	CINKA CONSTRUCTION AND CONSULTING SERVICES LLC	CYNTHIA MARTIN	11746 LAKEWAY DR CURTICE, OH 43412-9411
233	SERVICE LIVING LLC		
234	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
235	SYNCOR CONSULTING LLC	CRYSTAL BABB	1231 WALKERS WAY SAN ANTONIO, TX 78216-7714
236	TDP PROFESSIONALS, LLC	TERESA PHILLIPS	5990 KING WAY WALK LITHONIA, GA 30058-6172
237	GH PARTS & COMPONENTS, INC.	HOPE PATTERSON	2409 N BROAD ST SELMA, AL 36701-4010
238	BISHOP CLEAN CARE INC	JENNY SAVELLE	234 CEDRIC ST LEESBURG, GA 31763-4993
239	C & L PUMP SERVICE, INC.	LUIS MAGALLANES	11227 PELLICANO DR STE B EL PASO, TX 79935-5303

240	RUSTY BUCKET CONSTRUCTION LLC	SHIRLEY ESCOBAR	614 E OVINGTON ST LANCASTER, CA 93535-3201
241	J & J ELEVATOR SERVICES, INC.	JOYCE DEBROT	13412 E 249TH ST PECULIAR, MO 64078-8964
242	ALTA SOURCING PARTNERS LLC	MICHELLE ZELASKO	805 NORTH PAULINA AVENUE REDONDO BEACH, CA 90277-2250
243	CLL SPECIALISTS CORP	CAROL LOVELESS	11925 STARCREST DR SAN ANTONIO, TX 78247-4111
244	PHARMA PARAPLUIE LLC	ABIDAH OTTLEY	7736 W GRANADA RD PHOENIX, AZ 85035-5066
245	FLEXOVEYOR INDUSTRIES, INC.	TERESA GAGNA	3795 PARIS STREET UNIT B&C DENVER, CO 80239-3368
246	AMB CONTRACTING LLC	AVA BOWLES	7813 ALHAMBRA BLVD MIRAMAR, FL 33023-
247	RED FEATHER FEDERAL, LLC	MELISSA COOPER	2313 S BROADWAY AVE OKLAHOMA CITY, OK 73109-6023
248	ARS PRIME LOGISTICS, LLC	DENISE SHERMAN	1840 WESTERN AVE ALBANY, NY 12203-4624
249	MURADO LLC		
250	TAWAKKULL LLC	FATIMA ABUBAKAR	2204 RONALD DR WEST NORRITON, PA 19403-1353
251	FOSTERED VETERANS CORP	STEVEN MAATOUK	7301 N LINCOLN AVE STE 197 LINCOLNWOOD, IL 60712-1745
252	AFLUX INDUSTRIALS L.L.C.	SHAUNELLE SANDY	7127 GOBLET WAY CLINTON, MD 20735-5813
253	D'RAY PUBLIC SPEAKING & MORE, LP		
254	SATURN ENTERPRISES, INC.	MARIA MENZIES	27 YORK DR FORT WORTH, TX 76134-2546
255	ATHENA SERVICE SOLUTIONS LIMITED LIABILITY COMPANY	PAULETTE MCKENZIE	20 GREGORY FARM RD EASTON, CT 06612-2049
256	D&A CONTRACTING LLC	KAITLYN DASHER	2950 SUMNER WAY PALM HARBOR, FL 34684-1600
257	RAINTREE SOURCING & SUPPLY, LLC	NICOLE MILNER	4932 W SAINT CHARLES AVE LAKE CHARLES, LA 70605-6756
258	PROPERTY MANAGEMENT ENTERPRISES, INC.	JENNIFER WALTON	255 ROSE APPLE LN NAPLES, FL 34114-2555
259	BASEHIT SERVICES INC		
260	SHERMEZ LOGISTICS LLC	SHERRIE GOMEZ	24841 SW 120TH PL HOMESTEAD, FL 33032-5979
			225 1ST AVE N UNIT 904

261	FMS CONSULTING LLC	FAITH SHARP	SAINT PETERSBURG, FL 33701-3589
262	JAI CONSTRUCTION, LLC	JENA DUROUSSEAU	5501 OPELOUSAS ST LAKE CHARLES, LA 70615-3031
263	GLOBA TEK LLC	GLORIMAR KULINSKI	1701 LUBBOCK DR COPPERAS COVE, TX 76522-2187
264	MBAN INDUSTRIES LLC	ANNETTE ACHONDUH	3817 VALLARTA LN ROUND ROCK, TX 78681-2354
265	LOGIC ELEVATOR SOLUTIONS INC	KRISTEN BAUER	16424 W TURNBERRY CIR LOCKPORT, IL 60441-6146
266	STELLARS PRECISIONS LLC	SHONTERIA ROGERS	8735 DUNWOODY PL STE 5614 ATLANTA, GA 30350-2995
267	THE FOOT BULLY, L.L.C	KRYSTLE CAVINESS	8954 DAWNRIDGE DR HOUSTON, TX 77071-2446
268	DCT SPECIALTY CONSTRUCTION LLC	JESSICA SARANTAKIS	8501 E BONNIE ROSE AVE SCOTTSDALE, AZ 85250-6717
269	WEST MICHIGAN DOORS & CLOSETS L.L.C	LIA JENSEN	4245 44TH ST SE STE 10 GRAND RAPIDS, MI 49512-4053
270	DMGZ CONSTRUCTION, LLC	NOEMI DOMINGUEZ	21840 BRIGGS COLEMAN RD HARLINGEN, TX 78550-1724
271	CINTEOT INC.	THOMAS HUNT	3000 PRESIDENTIAL DR STE 170 FAIRBORN, OH 45324-6817
272	CAPROCK INDUSTRIAL LLC	TAZIA VAN JOHNSON	1100 W TOWN AND COUNTRY RD STE 1250 ORANGE, CA 92868-4633
273	LET US DO THIS, LLC	LISENNY RODRIGUEZ	1301 COPPER CT APT 1301 NEW WINDSOR, NY 12553-4504
274	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133

#	Name of Firm	Contact	Address and City, State Zip
1	ENVIRONMENTAL CONSULTANTS INC	ALEC FELHABER	1111 MYRTLE AVE EL PASO, TX 79901-1517
2	JULIUS KAAZ CONSTRUCTION CO INC	JODY KAAZ	716 CHEROKEE ST LEAVENWORTH, KS 66048-2467
3	DOUG OBRYAN CONTRACTING INC	DOUG O'BRYAN	21617 US HIGHWAY 18 MARTIN, SD 57551-5931
4	HUFFMAN WELDING & MACHINE, INC.	JASON HUFFMAN	6224 AVENUE O FORT MADISON, IA 52627-9533
5	CND, LLC	JENNYLYNN GATES	470739 HIGHWAY 51 STILWELL, OK 74960-9194
6	SHILOG, LTD	CONNIE CLEMONS	3551 MT MORIAH MCALESTER, OK 74501-2523
7	SEA PAC ENGINEERING INC	JOHN LEE	625 S NEW HAMPSHIRE AVE LOS ANGELES, CA 90005-1342
8	KHOTOL SERVICES CORPORATION	DAVID PLAINS	100 FRONT ST. GALENA, AK 99741-0019
9	NATIONAL MATERIAL SUPPLY CO LLC	KEVIE HENDRIX	4304 SPRING AVE DALLAS, TX 75210-1651
10	T.A.B. COMPANY, INC.	ANNETTA VICKERS-BENTIL	5561 ENRIGHT AVE SAINT LOUIS, MO 63112-3011
11	IDEAL SYSTEM SOLUTIONS INC	CAROL IRISH	4646 MAIN ST PEQUOT LAKES, MN 56472-4405
12	LOPEZ, JOSEFINA	JOSEFINA LOPEZ	4044 CRYSTAL DAWN LANE #102 SAN DIEGO, CA 92122-5835
13	WORRELL CONTRACTING CO INC	ADRIAN WORRELL	201 N CENTER ST GOLDSBORO, NC 27530-3622
14	FIRST PLACE SUPPLY, INC.	PATRICIA CORTHELL	47 N TREATY HWY POCATELLO, ID 83202-7008
15	M-80 SYSTEMS, INC.	JESSICA LEON GUERRERO	176 W MARINE CORPS DR ASAN, GU 96910-5068
16	FARGO PACIFIC INC.	JAY PARK	124 SERENU AVE TAMUNING, GU 96913-3407
17	DOTZLER CONSTRUCTION, INC.	ARLENE DOTZLER	216 W WALNUT AVE LOMPOC, CA 93436-6750
18	WEB-HED TECHNOLOGIES, LLC	JUANITA GONZALEZ	318 MENEFEE BLVD SAN ANTONIO, TX 78207-7830
19	CHAVIS' INC.	FITZGERALD CHAVIS	204 NC HIGHWAY 71 N MAXTON, NC 28364-7786
			355 PRICE RD

20	GROT, INC.	JERRY GROT	LEXINGTON, KY 40511-1996
21	ANA SOURCING LLC	KAYLIN CHESTNUT	20 RICHEY AVE OAKLYN, NJ 08107-2306
22	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
23	J. SANCHEZ CONTRACTING, INC.	JOE SANCHEZ	734 FLANDERS AVE SAN ANTONIO, TX 78214-1684
24	AMERICAS BEST ELECTRICMART INC	DAVID HICKS	RD STE D TAMUNING, GU 96913-4166
25	PACIFIC OFFICE SOLUTIONS LLC	JULIE VALDEZ	3403 S 8TH AVE YAKIMA, WA 98903-9513
26	GRAHAMS CONSTRUCTION INC	SCOTT GRAHAM	STE D DELCO, NC 28436-9197
27	YERBA BUENA ENGINEERING & CONSTRUCTION, INC.	MIGUEL GALARZA	1340 EGBERT AVE SAN FRANCISCO, CA 94124-3617
28	GREENWOOD GROUP INC	CHRIS GREENWOOD	2117 N WAVERLY ST PONCA CITY, OK 74601-1102
29	ALAMO CITY CONSTRUCTORS, INC.	GREGORY ALEXANDER	1716 S SAN MARCOS STE 215 SAN ANTONIO, TX 78207-7014
30	CABLE MOORE, INC.	GREG MOORE	4700 COLISEUM WAY OAKLAND, CA 94601-5008
31	ALTA MAX LLC	HANK TORBERT	246 HARBOR CIR NEW ORLEANS, LA 70126-1104
32	T & D MECHANICAL, INC.	JENNY ECKMAN	1501 CUSSETA RD COLUMBUS, GA 31901-3343
33	PACIFIC UNLIMITED INC	MICHAEL LIMTIACO	17-3311 CORSAIR AVE BARRIGADA, GU 96913-1613
34	BATES ENTERPRISES INC	CARLA BATES	51 HOLLYWOOD BLVD CHILDERSBURG, AL 35044-1064
35	HEARTWOOD PACIFIC, LLC	FREDERICK SINGER	15-2038 10TH AVENUE KEAAU, HI 96749-
36	MITEL DISTRIBUTING CORP	CESAR MUNECAS	4 CALLE AMERICA SAN JUAN, PR 00917-3638
37	G & C EQUIPMENT CORPORATION	JAY YANO	1715 W 130TH ST STE F GARDENA, CA 90249-2028
			PKWY

38	THE AMERICANA GROUP INC	LEILANI FLORES	TAMUNING, GU 96913-3509
39	B & H CONTRACTING COMPANY, INC	DAVID MCMINDES	502 N GARDEN AVE STE M 4A/B MATEO BUIDLING SIERRA VISTA, AZ 85635-3807
40	SERGENTS MECHANICAL SYSTEMS INC	JUSTIN LEGERE	235 QUAIL CT SANTA PAULA, CA 93060-9653
41	D.J. GROUP INC	JERRY WELCH	226 6TH ST BEVERLY, OH 45715-3013
42	ARNOLD ELECTRIC INC	JAMES RYALS	1424 E 3RD ST TULSA, OK 74120-2804
43	HC SERVICES INC	PAMELA BRIDGES	3870 HIGHWAY 84 E LAUREL, MS 39443-7336
44	G.L.H.C. SERVICES COMPANY	GOLBER HARDIN	11276 US HIGHWAY 301 N LUMBERTON, NC 28360-3789
45	CNI MANUFACTURING, LLC	JONNA KIRSCHNER	2600 JOHN SAXON BLVD NORMAN, OK 73071-1166
46	DOOR TECH, LLC	IAN COMER	5768 E GERSHMEL LOOP PALMER, AK 99645-8498
47	TEVET LLC	STEPHANIE HARDIN	310 T ELMER COX RD GREENEVILLE, TN 37743-6932
48	KPH CONSTRUCTION CORP	KEITH HARENDA	1237 W BRUCE ST MILWAUKEE, WI 53204-1218
49	MOUNTAIN CONSULTING, INC.	KIM ADAMS	103 S BRADFORD ST DOVER, DE 19904-7317
50	SILER EXCAVATING LLC	TAMMY SILER	1075 HILL ST JELLICO, TN 37762-2358
51	INSULATION SOURCES INC	BETTY KLANDA	2575 E BAYSHORE RD PALO ALTO, CA 94303-3210
52	SOUTHWEST PAINT PRODUCTS, INC.	PROSPERO BRIGANTE	1138 E PENNSYLVANIA AVE ESCONDIDO, CA 92025-3209
53	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992
54	EBS SUPPLY, INC.	GILBERT WEST	1901 1ST AVE STE 146 SAN DIEGO, CA 92101-0300
55	APEX PINNACLE CORP	TAMMY TAYLOR	326 WATER ST BINGHAMTON, NY 13901-2618
56	INSULATION SOURCES INC	BETTY KLANDA	1880 IOWA AVE STE 100 RIVERSIDE, CA 92507-7405
			198 ADRIAN C SANCHEZ ST STE 3

57	ADVANCE MANAGEMENT, INC.	MONTY MCDOWELL	TAMUNING, GU 96913-4456
58	SPECTRUM ELECTRIC INC	STEPHANIE PHILLIPS	410 SWEETWATER VONORE RD SWEETWATER, TN 37874-3025
59	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404
60	EL PASO J.A.G., INC.	ALEX CASTRO	3750 DURAZNO AVE EL PASO, TX 79905-1302
61	VSS LOGISTICS LLC	BEN BIZZELLE	15364 WHYTE HARDEE BLVD STE B HARDEEVILLE, SC 29927-6908
62	DOOR ADO EQUIPMENT SPECIALTIES, CORP.	JO ANN MEDINA	CALLE FERNANDEZ JUNCOS EDIFICIO PLAZA CENTRO CAROLINA, PR 00986-
63	ACUMEN ENTERPRISES INC	WAYNE BOYTER	1504 FALCON DR DESOTO, TX 75115-2414
64	HARD LIGHT CONSULTING GROUP, L.L.C.	DONALD SMITH	SE STE 200 WASHINGTON, DC 20032-1533
65	JAMCO VENTURES LLC	JOE MUNIZ	1450 N FLORES ST STE 2 SAN ANTONIO, TX 78212-4928
66	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
67	GERANIOS ENTERPRISES INC	LINDA GERANIOS	320 CENTRAL AVE SUITE 2 GREAT FALLS, MT 59401-3114
68	ALLNATIVE SOLUTIONS CORPORATION	RICHARD LAHM	818 ST. AUGUSTINES DRIVE WINNEBAGO, NE 68071-5167
69	T & T MATERIALS INC	JAMES TERHUNE	45 EXCHANGE BLVD STE 1000 ROCHESTER, NY 14614-2093
70	EVCO PARTNERS LP	EMILY MARKS	2701 PALMER HWY TEXAS CITY, TX 77590-6938
71	IAN CORPORATION	JIHYUNG CHONG	1129 ROUTE 15 BARRIGADA, GU 96913-
72	JOSEPH T BERRENA MECHANICALS INC	MATTHEW BERRENA	279 STANDING STONE AVE HUNTINGDON, PA 16652-1304
73	MGS CONSTRUCTION SERVICES INC	DIANE SANDERS	1500 ENTERPRISE DR STE 308 LEMOORE, CA 93245-9074
74	CAGUAS MECHANICAL CONTRACTOR INC	ALEX NIEVES	U4 CALLE NEBRASKA CAGUAS, PR 00725-2246

75	BYERLY & COOK CORP.	DYLAN BYERLY	127 CHALAN PASAHERU TAMUNING, GU 96913-4127
76	ARROWHEAD TRUCK EQUIPMENT INC	KIM DOAK	12300 S MINGO RD BIXBY, OK 74008-2141
77	E.L.C.I. CONSTRUCTION GROUP, INC.	MOISES BICHACHI	626 NE 124TH ST NORTH MIAMI, FL 33161-5523
78	DOC DEVELOPMENT, INC.	RADCLIFF QUARTERMAN	2500 PARK CENTRAL BLVD STE A6 DECATUR, GA 30035-3925
79	GULF PACIFIC CONTRACTING LLC	JASON HOWELL	750 SAND PATH RD BONIFAY, FL 32425-7426
80	BAIRCO CONSTRUCTION INC	STACY BAIR	1164 ROAD 7 LOVELL, WY 82431-9627
81	TELLES CONSTRUCTION CONSULTANTS LLC	THOMAS TELLES	3517 GATEWAY BLVD W EL PASO, TX 79903-4413
82	HURRICANE ELECTRONICS, INC.	LEANDRA CAIN	1480 SW 3RD ST # C-10 POMPANO BEACH, FL 33069-3225
83	E-LOGIC, INC.	LUIS PADILLA	7000 WASHINGTON, DC 20006-1921
84	WJMC LLC	ANGIE MCCLAIN	105 CHOCTAW ST ANDALUSIA, AL 36420-2563
85	A ROCK CONSTRUCTION CO INC	PERCY MCDONALD	400 IONE ST GREENWOOD, MS 38930-3714
86	GLOBE BUILDERS, INC.	ANGELINA RODRIGUEZ CHAVEZ	3009 PERSHING DR APT 1 EL PASO, TX 79903-2534
87	PUERTO RICO WATER MANAGEMENT INC	LUZ OTERO	216 CALLE DEL VALLE SAN JUAN, PR 00911-2328
88	PONTIAC DRYWALL SYSTEMS INC.	PHALANDA TRAVIS	20 W HURON ST PONTIAC, MI 48342-2100
89	TEAM HENRY ENTERPRISES, LLC	DEVON HENRY	2150 MAGNOLIA ST RICHMOND, VA 23223-2310
90	DAWN INCORPORATED	DAWN OCHMAN	2861 SFERRA AVE NW WARREN, OH 44483-2273
91	POWIS CONTRACTING INC	HOLLIE POWIS	9421 NUMBER THREE RD COPENHAGEN, NY 13626-3521
92	INTERNATIONAL GLOBAL SOLUTION, CORP	CLARENCE LYLES	643 MASSACHUSETTS AVE STE 200 INDIANAPOLIS, IN 46204-1653
93	N.A.E. ENTERPRISES, INC.	CHANTAL DAUENHAUER	843 S CHERRY LN FORT WORTH, TX 76108-2507
			ST 19 SUITE 1, LAS PALMAS VILLAGE

94	JCD ENGINEERING, INC.	JUAN DEL PINO	CATANO, PR 00962-
95	JOHN CHRIS TAYLOR CONSTRUCTION & DESIGN LLC	JOHN TAYLOR	11 MARCY ST FREEHOLD, NJ 07728-2301
96	CAYUSE TECHNOLOGIES, LLC	JONAS MOSES-CONNER	72632 COYOTE RD PENDLETON, OR 97801-1002
97	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
98	ADVANCED CONSTRUCTION SERVICES INC	RICK MITCHELL	2750 156TH AVE SE NORMAN, OK 73026-9149
99	BETTER LIVING/BETTER HEALTH, LLC	MARLENE THOMAS	2901 W. GIRARD AVENUE SECOND FLOOR PHILADELPHIA, PA 19130-1119
100	TATTERSALL SUPPLY, LLC	JARED WISCHE	997 NW 31ST AVE POMPANO BEACH, FL 33069-1121
101	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
102	2R CONSTRUCTION LLC	ROMANO DILLARD	309 E UNION ST MINDEN, LA 71055-4603
103	HACIENDA HOME CENTERS INC	JOSEPH SANCHEZ	430 S RIVERSIDE DR ESPANOLA, NM 87532-3393
104	SOUTH EASTERN GENERAL CONTRACTING, INC.	RALPHAEL LOCKLEAR	150 SQUARE LN SHANNON, NC 28386-9035
105	CHEROKEE NATION AEROSPACE AND DEFENSE, L.L.C.	JENNYLYNN GATES	470739 HIGHWAY 51 STILWELL, OK 74960-9194
106	CHEROKEE NATION CONSTRUCTION SERVICES, L.L.C.	JENNYLYNN GATES	2 W 2ND ST SUITE 1500-20 TULSA, OK 74103-3123
107	INTERNATIONAL FILTER MANUFACTURING CORP	KAREN WATSON	713 W COLUMBIAN BLVD S LITCHFIELD, IL 62056-3027
108	LEPAGE COMPANY, INC.	JAMES LEPAGE	218 WASHINGTON ST RED BLUFF, CA 96080-3825
109	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839
110	WALDROP CONSTRUCTION INC	MAX WALDROP	1528 LINWOOD BLVD OKLAHOMA CITY, OK 73106-5024
111	GEC TRUCKING & CONSTRUCTION, INC	GENE CARTER SR	5885 RICHARD ST JACKSONVILLE, FL 32216-5968
112	X CELL MANAGEMENT INC.	ALEC ASHTON	700 N JAMES RD COLUMBUS, OH 43219-1840
			1738 ELTON RD STE 215

113	BANNEKER VENTURES LLC	OMAR KARIM	SILVER SPRING, MD 20903-5732
114	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
115	J. I. GARCIA CONSTRUCTION, INC.	CARLOS CASTRO	4717 E HEDGES AVE FRESNO, CA 93703-4708
116	ADVANTIX ENGINEERING CORP	JOSE QUINONES	URB CAGUAX E14 AVE LUIS MUNOZ MARIN CAGUAS, PR 00725-3331
117	AGBAYANI CONSTRUCTION CORPORATION	VINCENT AGBAYANI	88 DIXON CT DALY CITY, CA 94014-2225
118	COMMAND PERFORMANCE CONSTRUCTORS INC	JAMES CHAVEZ	235 E BROADWAY STE 421 LONG BEACH, CA 90802-3162
119	AMERICAN BUILDING COMFORT SERVICES, INC.	MARK ROSALES	1300 GRAVES AVE OXNARD, CA 93030-8014
120	NEMAR TECHNOLOGY GROUP	MIKE MORALES	ARRIGOITIA 450 EXT ROOSEVELT SAN JUAN, PR 00918-2621
121	HUBZONE DOORS, INC.	ASHLEY TAYLOR	1235 PIERRE WAY STE 210 EL CAJON, CA 92021-4650
122	H.E.P. CONSTRUCTION, INC.	SAUD JABALI-NASH	1227 MARION BARRY AVE SE WASHINGTON, DC 20020-6907
123	FARMER CONSTRUCTION L.L.C.	WILLIE FARMER	3041 MCNAUGHTON DR STE F COLUMBIA, SC 29223-1832
124	C2 CONTRACTORS LLC	CORNELIOUS LAMBERTH	405 BANNER AVE GREENSBORO, NC 27401-4301
125	OUTSIDE BOX LLC	CANDICE SOMERVILLE	1428 FLOYD AVE RICHMOND, VA 23220-4618
126	CITI APPROVED ENTERPRISE, LLC	INGRID THIBODEAUX	2439 MANHATTAN BLVD STE 5052 HARVEY, LA 70058-5328
127	IDEAL ENGINEERING SOLUTIONS P.S.C	ISMAEL ROBLES	CARR. 172 KM. 9.4 CIDRA, PR 00739-
128	J.M. CARIBBEAN BUILDERS CORP	JAVIER MORALES	CARR #2 KM. 19.4 INTERIOR BO CANDELARIA TOA BAJA, PR 00951-
129	MICHAEL FRANCO INC	MICHAEL FRANCO	130 EL CHANATE DR STE F CANUTILLO, TX 79835-6621
130	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609

131	MASSILLON CONSTRUCTION AND SUPPLY LLC	THERESA CARR	1245 RAFF RD SW CANTON, OH 44710-1455
132	X CELL MANAGEMENT INC	ALEC ASHTON	64601 STATE ROUTE 56 CREOLA, OH 45622-8957
133	BETMAR CONSTRUCTION	MARY BENNETT	13376 NOEL LN GRASS VALLEY, CA 95945-8845
134	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
135	REFRIGERATION ENGINEERING, INC.	HECTOR GONZALEZ	CARR. 842 KM 1.9 CAMINO LOS ROMEROS CAIMITO SAN JUAN, PR 00926-
136	JTC SERVICES GUAM INC.	TOM CAMACHO	102 HAGATNA, GU 96910-7104
137	OBRATEC CONTRATISTA GENERAL INC	JOSE GARCIA	CARR. 842 KM 1.9 LOTE 4 CAMINO LOS BIGIOS BARRIO CAIMITO SAN JUAN, PR 00926-
138	CRUTCHO CREEK FARMS LLC	RAY WILLIAMS	6625 NE 10TH ST OKLAHOMA CITY, OK 73110-3339
139	DEL-MAR SOLUTIONS INC	JEAN EXANTUS	2478 SAND LAKE RD ORLANDO, FL 32809-7672
140	WARFEATHER, LLC	JOHN OGLESBEE	10250 S 287TH EAST AVE COWETA, OK 74429-6414
141	M2 FEDERAL INC.	MICHAEL SCHEIERN	705 W HOPKINS ST STE 112 SAN MARCOS, TX 78666-4380
142	HARTHY COMPANY, LLC	VERNON IRVING	9341 PHILADELPHIA RD STE D ROSEDALE, MD 21237-4156
143	US ECO PRODUCTS CORP	DOREEN BLADES	143 ESSEX ST STE 210 HAVERHILL, MA 01832-5553
144	MARK-VII ENTERPRISES, INC.	MARK SANTO	4028 HAMILTON ST OMAHA, NE 68131-1106
145	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
146	COMP ENVIRONMENTAL, INC.	YANLING CAROLINE WANG	5615 RECKER HWY WINTER HAVEN, FL 33880-1267
147	MEDVED GLOBAL INC	MICHELLE HICKS	24363 ROAD L CORTEZ, CO 81321-8805
			777 W CHEROKEE ST

148	CND LLC	JENNYLYNN GATES	CATOOSA, OK 74015-3235
149	PACIFIC UNLIMITED, INC.	MICHAEL LIMTIACO	3305 NEPTUNE AVE. BARRIGADA, GU 96913
150	VANESSA ACIERTO	VANESSA ACIERTO	LOT 25-1 664 CHALAN PALE RAMON HAYA ROUTE 1 YIGO, GU 96929-2417
151	TRITON SUPPLY INC	TRACI GERVASE	533 AUSTIN ST GRAND PRAIRIE, TX 75051-1914
152	RYMARC CONSTRUCTION INC	BRUCE LOPEZ	3440 PRINCETON DR NE STE 217 ALBUQUERQUE, NM 87107-2028
153	ESSNOVA SOLUTIONS, INC.	SRIDHARA GUTTI	1500 1ST AVE N UNIT 47 BIRMINGHAM, AL 35203-1873
154	A. GARCIA & CO., LLC	ROSA GARCIA	654 AVE MIRAMAR ARECIBO, PR 00612-4362
155	BARTKOWSKI LIFE SAFETY CORP	LAUREN SUSTEK	140 W 168TH ST SOUTH HOLLAND, IL 60473-2839
156	C. ORTIZ, CORP	CARMEN ORTIZ	4021 JOHNSON AVE EL PASO, TX 79930-6816
157	CASCADE SORBENT PRODUCTS INC	AL MARTINA	500 ALA MOANA BLVD STE 7400 HONOLULU, HI 96813-4902
158	CORONADO DISTRIBUTION COMPANY, INC.	CARLOS FLORES	205 W 35TH ST STE K NATIONAL CITY, CA 91950-7921
159	LAURA KAY DUNBAR, INC.	LAURA DUNBAR	394 E MAIN ST STE 201 VENTURA, CA 93001-4961
160	ACTION ROOFING HAWAII LLC	BOBBY ANDERSON	89-213 LEPEKA AVE WAIANAE, HI 96792-4113
161	GENESIS COMMUNICATIONS INC	IRENE GONZALEZ	CARR 422 KM 2.2 MOCA, PR 00676-
162	R & M GOVERNMENT SERVICES INC	RALPH ARCHETTI	650 MONTANA AVE STE A LAS CRUCES, NM 88001-4294
163	PANACEA CONSTRUCTION GROUP LLC	KEITH PLASTER	30 PINION CT DUBOIS, WY 82513-8926
164	TL STINSON & ASSOCIATES LLC	TAMIKA CHURCHILL	6216 BENTGRASS PL LOCUST GROVE, GA 30248-7064
165	APPLIED AUTOMATION, LLC	SCOTT MILES	1064 VAN BUREN AVE STE 1 INDIAN TRAIL, NC 28079-5569
			2026 S CALLAGHAN RD

166	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	SAN ANTONIO, TX 78227-2265
167	SERVICES, INC WHICH WILL DO BUSINESS IN CALIFORNIA AS ACS-	JEFF GINGRICH	4260 LINDA VISTA DR FALLBROOK, CA 92028-9494
168	NEW DOMINION CONSTRUCTION LLC	ADRIAN LAWSON	2525 POINTE CENTER CT STE 100 DUMFRIES, VA 22026-2277
169	CINTEOT INC.	CHRISTINA HUNT	75 S MAIN ST CHAMBERSBURG, PA 17201-2224
170	SANDOW CONSTRUCTION INC	KASMERA SANTIAGO-DOWNEY	4300 48TH ST BLADENSBURG, MD 20710-1108
171	BCH BUILDERS LLC	BROOKS JOHNSON	201 1ST ST E PARK RAPIDS, MN 56470-1612
172	BAHFED CORP	KEN PAUL	1000 SW BROADWAY STE 1110 PORTLAND, OR 97205-3063
173	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
174	IMPERIAL CONSTRUCTION AND EXCAVATING, LLC	GREGORY WILLIAMS	526 RAILROAD ST E DOUGLAS, GA 31533-1608
175	OAKMONT CONTRACTING LLC	WILLIAM TOSE	1100 WICOMICO ST STE 500 BALTIMORE, MD 21230-2075
176	CORBARA BUILDING GROUP CORPORATION	MARCO MARROQUIN	711 A AVE NATIONAL CITY, CA 91950-2228
177	FRONT RANGE CONSTRUCTION INC	ALBERT ROGERS	3730 SINTON RD STE 211 5075
178	SUSTECH LLC	ANGEL VAZQUEZ	JUST TRUJILLO ALTO, PR 00976-
179	IDEAL SYSTEM SOLUTIONS, INC.	SHELIA HERSHEY	12 ROCKY SLOPE DR SANTA FE, NM 87508-1353
180	REON INC	MATT PERRY	14502 GREENVIEW DRIVE STE 300 LAUREL, MD 20708-3287
181	EAST COAST TECHNOLOGIES, LLC	SCOTT ANDERSON	303 W MADISON ST BALTIMORE, MD 21201-4614
182	CREATIVE BUILDS CORPORATION	RODOLFO FARBER	925 B ST STE 601 SAN DIEGO, CA 92101-4603
183	TEAM HENRY ENTERPRISES, LLC	DEVON Henry	11401 SW 40th St Ste 319 Miami, FL 33165-3339
184	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
			4800 STRAWBERRY LN

185	MC COLEMAN GROUP LLC	ANN FANGMAN	LOUISVILLE, KY 40209-1455
186	BANNEKER VENTURES, LLC	OMAR KARIM	3901 PARK HEIGHTS AVE STE 201 BALTIMORE, MD 21215-7013
187	HUGH AND ASSOCIATES INC	VICTOR GILKES	1928 BENNING RD NE # 2 WASHINGTON, DC 20002-4724
188	UNAMI LLC	LAURA PONDER	7060 S YALE AVE STE 707 TULSA, OK 74136-5717
189	1 POINT PROCUREMENT SOLUTIONS, LLC	SHAYLA COLES	1225 SNAPPS FERRY RD GREENEVILLE, TN 37745-4099
190	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
191	RV GLOBAL SOLUTIONS INC.	RAHUL GANGU	247 E FRONT ST STE 1 TRENTON, NJ 08611-
192	A AND W ELECTRICAL AND REFRIGERATION A/C INC	WILBERTO ROSARIO	CARR. 155 KM 55.4 URB. ALIANZA, CALLE AZUCENA, BARRIO BARAHONA MOROVIS, PR 00687-
193	HORIZON SOLUTION COMPANY	JESSICA DERENBERGER	311 ADAMS ST RAEFORD, NC 28376-2701
194	MILLER ELECTRIC COMPANY INC.	ANNABELLE MILLER	3945 GLEN ST RENO, NV 89502-4966
195	ARROWHEAD GLOBAL LLC	CHAD HILL	22033 US HIGHWAY 19 N CLEARWATER, FL 33765-2362
196	PREMIER MECHANICAL PRODUCTS LLC	ASHLEY TUMBERGER	6601 KANSAS AVE KANSAS CITY, KS 66111-2314
197	KRANE SOLUTIONS, INC	SONIA LEON	CARR #2 KM. 39.9 VEGA BAJA, PR 00694-
198	ACCUGOV, INC	MATTHEW PAGLUICA	160 SACRAMENTO, CA 95827-2530
199	HONG YE RENTAL & CONSTRUCTION LTD	MICHAEL SHEU	3786 AFETNAS ROAD SAIPAN, MP 96950-
200	GUAM INSPECTION AND CERTIFICATION BUREAU, INC	THOMAS O'CONNOR	156 PEREZ WAY APT 13 TAMUNING, GU 96913-4053
201	DRIVEN CONTRACTORS LLC	JOSEPH LOOCKLEAR	DR MAXTON, NC 28364-1246
202	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
			7836 PARK AVE

203	JUSTIN J. REEVES, L.L.C	JUSTIN REEVES	HOUMA, LA 70364-3172
204	ENVIRONMENTAL SOLUTIONS, L.L.C.	JENNYLYNN GATES	2 W 2ND ST STE 1500-24 TULSA, OK 74103-3123
205	CRUZ DONNA	DONNA CRUZ	215 SANTA ANA ST ASAN, GU 96910-
206	THE AKANA GROUP INC.	CHAD JOHNSON	9950 WESTPARK DR STE 622 HOUSTON, TX 77063-5206
207	VENTURA CLIMATE CONTROL COMPANY, INC	MICHELLE MENDEZ	720 E SANTA MARIA ST SANTA PAULA, CA 93060-3634
208	G & E INDUSTRIAL SUPPLIES INC	AJITH NAIR	857 PENDALE RD EL PASO, TX 79907-2719
209	JJ CONTRACTING CORP	JERED MUOIO	201 GENESEE ST STE 200 AUBURN, NY 13021-3363
210	TEKSOL INTEGRATION GROUP INC	MIGUEL GONZALEZ	CARR 64 KM 4.3 BO SABANETAS MAYAGUEZ, PR 00680-
211	KHOTOL SERVICES CORPORATION	DAVID PLAINS	3900 C ST STE 100 ANCHORAGE, AK 99503-5962
212	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
213	RIZA CONSTRUCTION INC	COREY AVENS	228 CHAPARRAL TRL JACKSONVILLE, NC 28546-9407
214	ECHELON DISTRIBUTION LLC	STEVE NODES	1230 HIGH ST STE 215B AUBURN, CA 95603-5044
215	COMP ENVIRONMENTAL INC	CAROLINE WANG	4701 SANGAMORE RD STE N100 BETHESDA, MD 20816-2558
216	US WEST CORP	BRANDON EVERETT	1390 N OLD PACIFIC HWY MYRTLE CREEK, OR 97457-9353
217	COMPUTER ZEN LLC	KENNETH DAHL	403 MAIN ST SALMON, ID 83467-4218
218	PAULSON PLUMBING & MECHANICAL, LLC	PAULETTE BACA	1211 4TH ST SW ALBUQUERQUE, NM 87102-4368
219	RP NATIVE CONSTRUCTION LLC	RANDALL PATRICK	8045 OLD LAKE RD BOLTON, NC 28423-8991
220	KIAN CORP	PEJMAN GOUNIAI	1024 PALE SAN VITORES RD UNIT 210 GRAND PLAZA HOTEL TUMON, GU 96913-4019

221	CAPITAL COLORS, LLC	VERNON RAMEY	9611 COTTRELL TER SILVER SPRING, MD 20903-2229
222	ABELITA LLC	ADRIENE WRIGHT	203 YOUNG ST TALLAHASSEE, FL 32301-5437
223	ONE TOUCH BUILDING MAINTENANCE LLC	JULIAN CLAYBOURNE	221 N 18TH ST KANSAS CITY, KS 66102-4916
224	ISLAND CERTS CORPORATION	NANCY BARNHOUSE	203 TAMUNING, GU 96913-4429
225	BRIGHT REGARDS, LLC	YVONNE HERRERA	70 INDUSTRIAL PARK DR STE 3E WALDORF, MD 20602-3739
226	AVIATE ENTERPRISES, INC.	TIMOTHY DEVINE	5844 PRICE AVE MCCLELLAN, CA 95652-2407
227	GREEN LEAF BUILDERS INC	JOHN SANDERS	310 E TAYLOR DR SALLISAW, OK 74955-1927
228	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	404 HAUPT SQ SE LEESBURG, VA 20175-2722
229	CAROLINA GROUP PROPERTIES LLC	RONALD JAMES	701 S GEORGE ST STE 2 GOLDSBORO, NC 27530-5717
230	ROCK SOLID SOLUTIONS, LLC	ROLANDA AMOS	2124 CLIFF DR NASHVILLE, TN 37218-2814
231	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
232	WISE HEATING & COOLING INC	RONALD VITTITOW	2268 S M 76 WEST BRANCH, MI 48661-8700
233	WEGOALLPLACES LLC	MAURICE WHITE	4828 N ARMENIA AVE STE B TAMPA, FL 33603-1437
234	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
235	HARDY STEPHENSON LLC	STEVE HARDY	4215 CARTERS FERRY RD E MILAM, TX 75959-3416
236	OUTSIDE THE BOX LLC	CANDICE SOMERVILLE	433 EXETER DR BIRMINGHAM, AL 35206-2845
237	THE IMPACT GROUP LLC	SULAIMAN HARRIS	3102 35TH ST NE WASHINGTON, DC 20018-1628
238	GC WORKS INC	LANCE WAYNE	1820 SW 3RD AVE MIAMI, FL 33129-1417
	CAROLINA MICROWAVE		797 SUNNY SLOPE DR # 2

239	ASSOCIATES, INC	MIKE TADROS	COWPENS, SC 29330-9647
240	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
241	CONSTRATEGY LLC	NABIL ABDELLA	320 FLORIDA AVE NE APT 414 WASHINGTON, DC 20002-6940
242	NATIVE STAR GROUP, INC	JOSH PETERSON	17406 E 425 RD JAY, OK 74346-3735
243	COMP ENVIRONMENTAL INC	YANLING CAROLINE WANG	6731 WHITTIER AVE STE B-230 MC LEAN, VA 22101-4525
244	POTAWATOMI DEFENSE OPERATIONS LLC	AARON FINNIGAN	3215 W STATE ST STE 309C1 MILWAUKEE, WI 53208-3364
245	DUWAMISH SERVICES LLC	ZACH MARTIN	7421 5TH AVE S SEATTLE, WA 98108-4113
246	INVESTMENTS LLC		
247	APPLIED AUTOMATION LLC	ALDEN MILES	110 S MARLBORO ST BENNETTSVILLE, SC 29512-4032
248	ELYSIAN PROJECT MANAGEMENT LLC	MARIANNE ALLEN	3076 W 1000 N REXBURG, ID 83440-3370
249	QUEST POWER INTERNATIONAL, LLC	PATRICIA ARAUZ-CORROW	36 W PINE ST STE 202C ORLANDO, FL 32801-2612
250	BCW GROUP, L.L.C	SHANE CESSNUN	1903 W ARKANSAS ST DURANT, OK 74701-5625
251	PACIFIC NORTHWEST MOBILE WELDING LLC	JOY TAYLOR	4801 RODEO DR CLEVELAND, OK 74020-5757
252	SNODGRASS CONTRACTING LLC	JEFF SNODGRASS	1910 TOWNE CENTRE BLVD STE 250 ANNAPOLIS, MD 21401-3599
253	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
254	KHOTOL SERVICES CORPORATION	DAVID PLAINS	123 E GAY ST STE A7 WARRENSBURG, MO 64093-1845
255	MGS CONSTRUCTION SERVICES INC.	DIANE SANDERS	310 E TAYLOR DR SALLISAW, OK 74955-1927
256	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
257	KIRA INFRASTRUCTURE LLC	RICHARD RINEHART	1150 ACADEMY PARK LOOP STE 230-H1 3714

258	SDVOSB MATERIALS TECHNOLOGY & SUPPLY LLC	HARRISON KENDALL	1801 PALMDALE CT FORT MYERS, FL 33916-2309
259	ARCON LLC	JONATHAN GONZALEZ	346 CALLE VILLA PONCE, PR 00730-2716
260	CHIRICAHUA PROCUREMENT LLC	JOHN WOFFARD	320 GOLD AVE SW STE 806 ALBUQUERQUE, NM 87102-3202
261	MAINTENANCE SERVICES 360 LLC	JOHN BOWEN	5151 NW 159TH ST STE F MIAMI LAKES, FL 33014-6349
262	SHADOWFAX INC	JENNIFER DAVIS	1725 OLD HOUSTON RD ARLEY, AL 35541-4748
263	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
264	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
265	FIRST PLACE SUPPLY INC	PATRICIA CORTHELL	3301 CLINE ST HOUSTON, TX 77020-6123
266	SOLVANCY LLC	ANDERSEN DELINOIS	685 CITADEL DR E STE 29012 5314
267	EASTHILL CONSTRUCTION CORP	VEDANT BHANDERI	17 ACADEMY ST STE 515 NEWARK, NJ 07102-2932
268	Ashelyn Group, LLC, The	VANESSA L HALSEY	600 Six Flags Dr Ste 437 Arlington, TX 76011-6346
269	AOR LOGISTICS, LLC	PAUL NESBIT	130 W MAIN ST STE 206 ORANGE, VA 22960-1555
270	MILLER ELECTRIC COMPANY INC	ANNABELLE MILLER	2730 SW 57TH ST STE C TOPEKA, KS 66609-9417
271	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
272	F & D FEDERAL LLC	MOHAMMED ALFROOKH	161 FORT EVANS RD NE STE 325 LEESBURG, VA 20176-3375
273	JUSTIN J REEVES LLC	JUSTIN REEVES	159 BRENDA LN INLET BEACH, FL 32461-8153
274	A & A GENERAL CONTRACTOR CORP	IVELISSE MORENO CRESPO	ROSA SECTOR MONSERRATE VEGA ALTA, PR 00692-
275	MILLER ELECTRIC CO INC	ANNABELLE MILLER	18 N UNIVERSITY AVE STE 40 PROVO, UT 84601-8406

276	ZBS & ASSOCIATES LLC	TANISHA JEWELL	510 PLAZA DRIVE STE 1245 ATLANTA, GA 30349-7239
277	Miller Electric Company Inc.	Annabelle Miller	102 SUSANVILLE, CA 96130-8619
278	HYBRID STEEL DESIGN LLC	ASHLEY CLARK	1711 MAIN ST FORT BENTON, MT 59442-8746
279	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
280	CAM-KOK CONTRACTOR GROUP INC	KEYLA MARIN	CARR 830 KM 4 3 BO CERRO GORDO BAYAMON, PR 00956-
281	2LYONS AEROSPACE LLC	MIKE CANTAVE	3329 NW 55TH ST FORT LAUDERDALE, FL 33309-6306
282	PROPERTY IMPROVEMENT OF NEW BRUNSWICK LLC	GREGORY REID	40 W LAFAYETTE STREET TRENTON, NJ 08608-2011
283	GREYSTONE SERVICES LLC	FAIZAH SAYED	6195 LEWIS AVE TOLEDO, OH 43612-4341
284	GUAM SPECS CORPORATION	UZOAMAKA ODIMEGWU MBAKWEM	120 CHALAN PADERON BARRIGADA, GU 96913-
285	ALL PHASE SOLUTIONS, LLC	SAL RABAH	1849 LONGMONT DR WAKE FOREST, NC 27587-5965
286	AXC INNOVATIONS INC	ANH THU DOAN	1312 E GUAVA AVE LOMPOC, CA 93436-6213
287	WR5 LLC	SHUNTELL ROBINSON	9696 HIGHWAY 5 ARLINGTON, AL 36722-3314
288	TAC2 GLOBAL LLC	CHRISTOPHER STURM	600 CLEVELAND ST STE 347 CLEARWATER, FL 33755-4151
289	AVANTE ENGINEERING LLC	RAFAEL PERALES	URB VALLE TOLIMA PARQUE INDUSTRIAL OESTE AVE. INNOVACION, SOLAR 16 CAGUAS, PR 00727-
290	CJ MECHANICAL LLC	CARMELO GARCIA	CARR 814 KM 0.4 BO ANONES NARANJITO, PR 00719-
291	PUYENPA CONSTRUCTION, LLC	EMILY STOUT	511 DUCKWATER FALLS RD DUCKWATER, NV 89314-9800
292	ENDEVELOPMENT L.L.C.	AARON HAMPTON	1 CORWIN CT STE 103 NEWBURGH, NY 12550-5176
			CARR 102 KM 40.2 SAN FRANCISCO PLAZA OFICINA 203-204

293	ENCO GROUP LLC	JULIO SOTO	SABANA GRANDE, PR 00637-
294	Allan Santiago	Allan Santiago	143 Carlos Lane STE A Tamuning, GU 96913-4339
295	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	5470 S MONROVIA AVE TUCSON, AZ 85706-2120
296	M & G CLEANING & PAINTING SERVICES INC.	MARIA GAITAN	4030 6TH ST BALTIMORE, MD 21225-2108
297	ALL PHASE SOLUTIONS, LLC	SAL RABAH	200 SAN JUAN, PR 00901-1660
298	VULCAN CONSTRUCTION LLC	DAVID PATTERSON	1129 E 9TH ST JACKSONVILLE, FL 32206-4007
299	GC WORKS INC	LANCE WAYNE	9894 BISSONNET ST STE 241 HOUSTON, TX 77036-8239
300	GEMCRAFT CONTRACTING LLC	BRYAN KUTTER	201 1ST ST E, STE 201 PARK RAPIDS, MN 56470-1612
301	JUSTIN J REEVES LLC	ASHLEY MEISSNER	21711 FM 1093 RD RICHMOND, TX 77407-9527
302	LALINI ENTERPRISES LLC	LALINI PILLAY	1400 MONTAGUE ST NW WASHINGTON, DC 20011-2870
303	NEUROTH CONSTRUCTION INC.	ROBERT NEUROTH	1165 LINDA VISTA DR STE 102 SAN MARCOS, CA 92078-3821
304	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431
305	ADVANTAGE CONTRACTING, LLC	ANDREA BALDWIN	504 RANKIN ST ANDALUSIA, AL 36420-4821
306	KAIVA SERVICES, LLC	CAMERON ECHOHAWK	6060 W 3650 N STE 400 IVINS, UT 84738-6618
307	GUYTON INDUSTRIES LLC	GUYTON STONE	10691 US HIGHWAY 441 N OKEECHOBEE, FL 34972-7522
308	B & H CONTRACTING COMPANY, INC.	DAVID MCMINDES	2512 CONTRACTORS LOOP FORT BRAGG, NC 28307-
309	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
310	BERCORP MECHANICAL CONTRACTORS CORP.	OSCAR BERMONTY	1250 AVE PONCE DE LEON STE 1010 SAN JUAN, PR 00907-3914
311	All Phase Solutions, LLC	SALEH RABAH	515 M St Se Bldg 74-103 Washington, DC 20003-3456

312	DOC DEVELOPMENT INC	RADCLIFF QUARTERMAN	300 S 1ST ST STE 302 LEESVILLE, LA 71446-4372
313	ESTIME MANAGEMENT CORPORATION	LUNIQUE ESTIME	2367 MCCULLOH ST BALTIMORE, MD 21217-3542
314	MAUKA CONTRACTING LLC	AMBER STRONG	3084 POIPU RD KOLOA, HI 96756-9573
315	MATRIX BUILDING, LLC	RICK CAMARENA	13334 SEAWAY RD STE 201 GULFPORT, MS 39503-5290
316	BROWN CONSTRUCTION INC	JAMES BROWN	68 BANGOR ST HOULTON, ME 04730-1641
317	EPCINNOVATIONS LLC	RYAN FRALISH	82 CALLE 3 ISABELA, PR 00662-4169
318	PER-GEESH CONSTRUCTION CORPORATION	PAMELA AMES	190 KLAMATH BLVD KLAMATH, CA 95548-9322
319	GC WORKS INC.	LANCE WAYNE	38 ROMNEY ST STE 103 CHARLESTON, SC 29403-3825
320	PUYENPA CONSTRUCTION LLC	EMILY STOUT	207 E RIDGEVILLE BLVD MOUNT AIRY, MD 21771-5257
321	DOUBLE R GENERAL CONTRACTING, LLC	JOHN REED	321 COUNTY ROAD 327 ROSEBUD, TX 76570-2212
322	ALL PHASE SOLUTIONS, LLC	SALEH RABAH	105 VALE ST POMONA PARK, FL 32181-2452
323	SOLAR STEP LLC	LOURDES MARCANO	REPARTO TERESITA U-10 CALLE 20 BAYAMON, PR 00961-8352
324	RIZA CONSTRUCTION INC.	COREY AVENS	400 W 7TH ST STE 105A BLOOMINGTON, IN 47404-3900
325	RANGE CONSTRUCTION LLC	YOVANI SALOME-SANCHEZ	1345 K ST SE UNIT 203 WASHINGTON, DC 20003-4543
326	PUYENPA CONSTRUCTION LLC	EMILY STOUT	813 MAIN ST PORTAGE, PA 15946-1757
327	PUYENPA CONSTRUCTION LLC	EMILY STOUT	109 W MAIN ST STE E CLINTON, NC 28328-4046
328	CHIRICAHUA PROCUREMENT LLC	MIKE GANN	2315 E GORE BLVD LAWTON, OK 73501-6116
329	PIERCE & SONS CONSTRUCTION, LLC	NATHAN PIERCE	3686 BARLOW RD LUMBER BRIDGE, NC 28357-7972
			5009 E 39TH ST

330	MD DOYNE CONSTRUCTION LLC	MASON DOYNE	LITTLE ROCK, AR 72206-3703
331	NEW DOMINION CONSTRUCTION, LLC	BRYAN DISEATI	9668 MADISON BLVD STE 142 MADISON, AL 35758-9127
332	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
333	FEDERAL CONSTRUCTION OF GA LLC	JOHN STEWART	635 LONG BRANCH TRL RANGER, GA 30734-6083
334	HAMILTON'S SQUARE LLC	WHITNEY WHITE	321 S FRAZIER ST PHILADELPHIA, PA 19143-1311
335	PUYENPA CONSTRUCTION LLC	EMILY STOUT	9258 CULEBRA RD STE 140-8 SAN ANTONIO, TX 78251-2871
336	POTAWATOMI DEFENSE OPERATIONS, LLC	AARON FINNIGAN	101 W BENSON BLVD STE 303 ANCHORAGE, AK 99503-3937
337	A ROCK CONSTRUCTION CO INC	PERCY MCDONALD	417 PERRY ST HELENA, AR 72342-3238
338	UNAMI LLC	LAURA PONDER	9300 NORMANDY BLVD STE 510 JACKSONVILLE, FL 32221-5563
339	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
340	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
341	HACIENDA HOME CENTERS INC	JOSEPH SANCHEZ	3511 GIBSON BLVD SE ALBUQUERQUE, NM 87106-1627
342	SHAI LLC	LAWRENCE HAMMOND	4041 POWDER MILL RD STE 116B CALVERTON, MD 20705-3106
343	SHADES OF PARADISE LLC	MARILOU POLENDEY-SCOTT	150M E ADDENG ST DEDEDO, GU 96929-6561
344	GRANITE GROUP, LLC	CINDY WILEN	19207 PRAIRIE HILLS RD BELLE FOURCHE, SD 57717-6105
345	METALECTRIK MANUFACTURING CORP	NATALIA CORDERO	PARCELAS SELGAS CARR. 642 KM. 11.0, CALLE ARIZMENDI #1 PARQUE INDUSTRIAL FLORIDA, PR 00650-
346	ADAKU LLC	LETISHA CARTER	3511 INVERNESS DR GREENSBORO, NC 27406-5715
	DAY & NIGHT FINANCIAL SERVICES,		352 UNIVERSITY AVE SW SUITE W133

347	INC	JOSE MUSE	ATLANTA, GA 30310-3698
348	METRO CONSTRUCTION & PROJECT MANAGEMENT LLC	CARLOS VILA	135 CALLE CARACOL ALTURAS DE M CABO ROJO, PR 00623-3186
349	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
350	KUNERT ELECTRIC, LLC	CHRISTOPHER LAMONT	200 NE CHANNON AVE ROSEBURG, OR 97470-1489
351	MIMIC MANUFACTURING, LLC	ROBERT WHITE	477222 E 1090 ROAD ROLAND, OK 74954-5034
352	AHTNA BUILDERS, LLC	BERNARD WONG	1100 N LITTLE BROOK LN STE A-100 PALMER, AK 99645-8931
353	CARVER WATER TECHNOLOGY LLC	TRAVIS INGRAHAM	333 N FALKENBURG RD STE B226 TAMPA, FL 33619-7894
354	G & C EQUIPMENT CORP	JASON YANO	879 W 190TH ST STE 500 GARDENA, CA 90248-4225
355	MIMIC MANUFACTURING, LLC	ROBERT WHITE	102 PITCHFORD LN HEAVENER, OK 74937-7489
356	STARLIGHT ADVERTISING SPECIALTIES PROMOTION, INC	ALEJANDRO CUEVAS	NEBRASKA CAGUAS, PR 00725-2244
357	VENTURA LOW VOLTAGE & SECURITY LLC	SHERRY CARGNINO	316 E VINCE ST VENTURA, CA 93001-1760
358	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
359	GOVERNMENTAL PURCHASING SOLUTIONS LLC	SOPHIA BROWNING	3435 LOVELACEVILLE ROAD PADUCAH, KY 42001-5854
360	MCKENZIE PROCUREMENT L.L.C.	JACOB MCKENZIE	4602 TUCSON DR INDIANAPOLIS, IN 46241-6271
361	CHUGACH PACIFIC SOLUTIONS LLC	WILLIAM MARTZ	189 E SIKET ST DEDEDO, GU 96929-
362	GH PARTS & COMPONENTS, INC.	HOPE PATTERSON	2409 N BROAD ST SELMA, AL 36701-4010
363	DYLAN MECHANICAL CONSTRUCTION SERVICES INC	MATTHEW HUNTER	451D GOGUE DR ORDOT, GU 96910-
364	HALL & TOWING LLC	JAMES HALL	678 SEVEN BROTHERS RD EL DORADO, AR 71730-6090
365	SPECTRUM BUILDERS & RENOVATIONS, INC.	TASAWWAR KHAN	3841 N FREEWAY BLVD STE 120 SACRAMENTO, CA 95834-1968

366	PATRICK'S PLUMBING & HEATING, INC.	PATRICK CARLSON	47023 SCOUT CAMP RD ATLANTIC MINE, MI 49905-8008
367	TRUSOUTH SERVICES LLC	DAVID YATES JR	23 MANOR HILL RD NATCHEZ, MS 39120-9349
368	PHARMA PARAPLUIE LLC	ABIDAH OTTLEY	7736 W GRANADA RD PHOENIX, AZ 85035-5066
369	CPSGOV, LLC	MEGAN HALLDORSON	72632 COYOTE RD PENDLETON, OR 97801-1002
370	SUNLIGHT ENTERPRISES CO., INC.	ADRIAN PORRAS	7250 BROGAN DR STE A EL PASO, TX 79915-1346
371	POCOSIN BAY INDUSTRIES, L.L.C.	MARK HUNT	3888 MIDWAY RD MAXTON, NC 28364-9596
372	RED FEATHER FEDERAL, LLC	MELISSA COOPER	2313 S BROADWAY AVE OKLAHOMA CITY, OK 73109-6023
373	KINGDOM SOLUTIONS CORP	ELIAS RIVERA	GORDO BAYAMON, PR 00961-
374	MYFLOGISTICS LLC	QUENTIN BROWN SR	17 AFFIRMED WAY NEWNAN, GA 30263-2464
375	AHTNA COMMERCIAL SERVICES LLC	TIM FINNIGAN	1100 N LITTLE BROOK LN BLDG B, STE B-100 PALMER, AK 99645-8931
376	GT ENTERPRISES OF VA LLC	GRANT MORRIS	1350 STONEY MOUNTAIN RD MARTINSVILLE, VA 24112-1798
377	JIREH LOGISTIC ASAP LLC	RODOLFO CADENA	402 N CEMETERY RD APT G2 DAWSON, TX 76639-3429
378	THE PARTNERS CONTRACTING GROUP INC	JORDAN BULL	131 N GARDEN AVE CLEARWATER, FL 33755-4119
379	MILCON TECHNOLOGIES, LLC	DAVID GIRALDO	2231 COUNTY HIGHWAY 2 LAUREL HILL, FL 32567-4500
380	ANOMALYTICS SOLUTIONS LLC	CYRUS HANSON	9 W FRANKLIN AVE APT 306 MINNEAPOLIS, MN 55404-2594
381	ENTERPRISE SOLUTIONS AND ANALYTICS, LLC	LOK ACHARYA	2932 BRIAROAK DR DULUTH, GA 30096-8942
382	BUILD A BRIDGE PROPERTIES LLC	CRYSTAL PARSLEY	2001 HARLEM AVE BALTIMORE, MD 21217-1012
383	DEVGROUP ONE LLC	JULIO WHITE	304 THONOTOSASSA, FL 33592-3892
384	GSI LLC	BLAIR BRYLAWSKI	4551 TANGLEWOOD DR BLADENSBURG, MD 20710-1017
			3000 PRESIDENTIAL DR STE 170

385	CINTEOT INC.	THOMAS HUNT	FAIRBORN, OH 45324-6817
386	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133
387	M - W ELECTRIC, INC.	KIMBERLY WOODS	605 E 4TH AVE RED SPRINGS, NC 28377-1668

#	Name of Firm	Contact	Address and City, State Zip
1	ASA ENVIRONMENTAL PRODUCTS INC	ANA SCHNEIDER	22 BAYVIEW AVE STE 46 STONINGTON, CT 06378-1169
2	SOUTHERN SAFETY SUPPLY LLC	SARA SIZEMORE	207 CENTER PARK DR STE 2090 KNOXVILLE, TN 37922-2136
3	JULIUS KAAZ CONSTRUCTION CO INC	JODY KAAZ	716 CHEROKEE ST LEAVENWORTH, KS 66048-2467
4	BAKER & ASSOCIATES INC	LEANNE BROWN	60 COMPARK RD DAYTON, OH 45459-4802
5	WALKER MILLER EQUIPMENT COMPANY, INC.	CONNIE MILLER	4400 N ORANGE BLOSSOM TRL ORLANDO, FL 32804-1903
6	ECTRON CORP	KARY DODD	9340 HAZARD WAY SUITE B2 SAN DIEGO, CA 92123-1228
7	JO-KELL INC.	MARY KELLY	628 INNOVATION DR CHESAPEAKE, VA 23320-3846
8	SCIENTIFIC SALES, INC.	VICKI DYER	130 VALLEY CT OAK RIDGE, TN 37830-8046
9	DCT, INCORPORATED	CHERYL BERNARDI	501 E CHEROKEE AVE MCALESTER, OK 74501-5335
10	MPI FASTECH, LLC		
11	IDEAL ELECTRICAL SUPPLY CORPORATION	JANICE ADAMS	3515 V ST NE WASHINGTON, DC 20018-1530
12	IDEAL SYSTEM SOLUTIONS INC	CAROL IRISH	4646 MAIN ST PEQUOT LAKES, MN 56472-4405
13	PEACHTREE MECHANICAL, INC.	RICHARD DENNEY	535 MARKSMEN CT FAYETTEVILLE, GA 30214-5918
14	SMARTNET, INC.	LYNNE AUSTIN	211 EDWARDS FERRY RD NE LEESBURG, VA 20176-2305
15	M-80 SYSTEMS, INC.	JESSICA LEON GUERRERO	176 W MARINE CORPS DR ASAN, GU 96910-5068
16	CMC & MAINTENANCE INC	JASON GATCHELL	4 UNION ST STE 1 BANGOR, ME 04401-6457
17	STREET LEGAL INDUSTRIES, INC	LISA BISESE	102A JEFFERSON CT OAK RIDGE, TN 37830-4821
18	MW SERVICES INC	MARIE WILLIS	42208 REMINGTON AVE TEMECULA, CA 92590-2549

19	DOTZLER CONSTRUCTION, INC.	ARLENE DOTZLER	216 W WALNUT AVE LOMPOC, CA 93436-6750
20	ADVANCED SOLUTIONS GROUP, LLC	DENISE MITCHELL	47 CRESTWOOD RD STE 1 KAYSVILLE, UT 84037-1445
21	PATRICIA I. ROMERO, INC.	PATRICIA ROMERO	1248 COOLIDGE AVE NATIONAL CITY, CA 91950-4332
22	HUNTER PACIFIC GROUP	CELIA HUNTER	2742 LANING RD SAN DIEGO, CA 92106-6430
23	ANA SOURCING LLC	KAYLIN CHESTNUT	20 RICHEY AVE OAKLYN, NJ 08107-2306
24	ACCESS COMMUNICATIONS GROUP, LLC	ANA ESPINOZA ENRIQUEZ	2017 TEXAS AVE STE 1 EL PASO, TX 79901-1943
25	ALASKA STAIRLIFT & ELEVATOR LLC	DARCY BENNETT	1200 E 76TH AVE STE 1201 ANCHORAGE, AK 99518-3219
26	M-PAK, INC.	DEBBIE COOLEY	11255 CAMP BOWIE WEST BLVD STE 111 ALEDO, TX 76008-3692
27	AMERICAS BEST ELECTRICMART INC	DAVID HICKS	129 W HARMON INDUSTRIAL PARK RD STE D TAMUNING, GU 96913-4166
28	PACIFIC OFFICE SOLUTIONS LLC	JULIE VALDEZ	3403 S 8TH AVE YAKIMA, WA 98903-9513
29	MELTECH CORPORATION, INC.	JOANNE KRISHACK	3321 75TH AVE STE G LANDOVER, MD 20785-1519
30	MERCOM, INCORPORATED	DUSTIN FUGETT	1067 PETIGRU DR PAWLEYS ISLAND, SC 29585
31	ADVANCED INTEGRATION GROUP, INC.	DONNA CHAPPEL	1 MCCORMICK RD STE A MC KEES ROCKS, PA 15136-1429
32	VIGIL CONTRACTING, INC.	SHANNAN VIGIL	2140 PRIEST BRIDGE CT STE 7 CROFTON, MD 21114-2499
33	JO-KELL INC	KRISTIN PARKINSON	5795 MINING TER JACKSONVILLE, FL 32257-3201
34	BRUCE'S ELECTRIC, INC	BARBARA WALKER	7447 BEATLINE RD LONG BEACH, MS 39560-8802
			2135 ROWLAND AVE

35	COLLINS CONSTRUCTION SERVICES, INC	DAWN MORGAN	SUITE C SAVANNAH, GA 31404-4422
36	KIPPER TOOL COMPANY	ELIZABETH GARRISH	2375 MURPHY BLVD GAINESVILLE, GA 30504-6001
37	CAN'T BE BEAT FENCE AND CONSTRUCTION, LLC	MEREDITH ANDERSON	2204 HIGHWAY 53 PERKINSTON, MS 39573-3910
38	A.M. COMMUNICATIONS SOLUTIONS, INC.	MARCY GRAMBO	1 N MAIN ST DOVER, PA 17315-1239
39	D&D CONSTRUCTION, INC.	DIANA WONG	94-1388 MOANIANI ST STE 222 WAIPAHU, HI 96797-6605
40	FIRST LOGISTEX, INC.	FAITH BLAIR	13795 JUDGE ORR RD PEYTON, CO 80831-8405
41	AIR CONTROL, INC.	SEAN CONNELL	80 14TH AVE N CLINTON, IA 52732-2928
42	DAVID C. SMITH & SON, INC.	CHRISTINA SMITH	3437 KEMPTOWN CHURCH RD MONROVIA, MD 21770-8707
43	DIVINE IMAGING INC.	KIMBERLY DEVANE	21323 PACIFIC COAST HWY STE 101 MALIBU, CA 90265-5202
44	RAND & JONES ENTERPRISES COMPANY, INC.	JOAN YANG	2950 NEILSON WAY UNIT 507 SANTA MONICA, CA 90405-5364
45	B&M CONSTRUCTION, INC.	BARBARA MYRICK	3134 BEACON ST COLORADO SPRINGS, CO 80907-5187
46	RAND & JONES ENTERPRISES CO INC	JOAN YANG	400 E 67TH ST APT 6D NEW YORK, NY 10065-6326
47	ADVANCED COMMUNICATION CABLING INC	RUTH FRITZ	35 BEACHVIEW LN FALLS OF ROUGH, KY 40119-7576
48	ADVANTAGE MECHANICAL-REFRIGERATION, INC.	JODI VAN HAREN	3836 RUSSELL ST STE 1 CEDAR SPRINGS, MI 49319-9821
49	MISSION ELECTRONICS INC	AARON ALT	11450 W 79TH ST OVERLAND PARK, KS 66214-1484
50	J'S ASSOCIATES, LLC	JUANITA KEEHN	10375 SOUTHERN MARYLAND BLVD STE 16B DUNKIRK, MD 20754-3059
51	ROOFING RESOURCES INC	JOSEPH CORDREY	423 MCFARLAN RD STE 100 KENNETT SQUARE, PA 19348-2487
52	GARUD TECHNOLOGY SERVICES, INC.	RAJIV SINGH	8815 CENTRE PARK DR STE 320 COLUMBIA, MD 21045-2284

53	HORIZON CONSTRUCTION GROUP, LLC	CROCKER WALLACE	2154 HILLSHIRE CIR MEMPHIS, TN 38133-6075
54	FLEX-LINE AUTOMATION, INC.	CATHY RINNE	3628 UNION SCHOOL RD CHESTER, IL 62233-3002
55	ARBILL INDUSTRIES INC	JOSH GOLDSTEIN	10450 DRUMMOND RD PHILADELPHIA, PA 19154-3806
56	MCCALL INDUSTRIAL SUPPLY CO LLC	STEPHANIE MCCALL	6372 W CONTRACTORS ST BOISE, ID 83709-4301
57	MCINTYRE BROTHERS LLC	BRANDY DECKARD	1020 7TH ST BEDFORD, IN 47421-2324
58	SILER EXCAVATING LLC	TAMMY SILER	1075 HILL ST JELLICO, TN 37762-2358
59	BARKLEY ANDROSS CORP.	JESSSICA ANDROSS	17415 CATALPA ST HESPERIA, CA 92345-5080
60	HUNEKE ASSOCIATES INC	NICOLE HUNEKE	706 W MAPLE AVE MERCHANTVILLE, NJ 08109-1822
61	PACE PACIFIC CORP	GLORIA LOWRIE	3731 E UNIVERSITY DR STE A PHOENIX, AZ 85034-7246
62	TITAN SPECIALIZED SERVICES INC	MANUEL PRIETO	4920 E 2550 N EDEN, UT 84310-7706
63	WASHINGTON OFFICE INTERIORS LLC	BARBARA BARRY	14 RIDGE SQ NW STE 401 WASHINGTON, DC 20016-2992
64	SPIKA DESIGN & MANUFACTURING, INC.	KATHRYN SPIKA	254 COTTONWOOD CREEK RD LEWISTOWN, MT 59457-4936
65	JACK WAYTE CONSTRUCTION CO., INC	REGINA BABCOCK	7043 HIGHWAY 54 70 ALAMOGORDO, NM 88310-9138
66	APEX PINNACLE CORP	TAMMY TAYLOR	326 WATER ST BINGHAMTON, NY 13901-2618
67	PELICAN SALES INC	JOE GIANNACCO	2825 BUSINESS CENTER BLVD STE C9 MELBOURNE, FL 32940-7193
68	BCL LEASING LIMITED PARTNERSHIP	DANIELLE DETERDING	MILE 1225.5 AK HWY TOK, AK 99780-
69	ADVANCE MANAGEMENT, INC.	MONTY MCDOWELL	198 ADRIAN C SANCHEZ ST STE 3 TAMUNING, GU 96913-4456
70	SHORE COMMUNICATIONS, INC.	LAURA CASTNER	913 VENTURES WAY CHESAPEAKE, VA 23320-2857
71	GRIFFITH CONTRACTING, LLC	LEANN GRIFFITH	29400 E 68TH ST S BROKEN ARROW, OK 74014-5404
			3750 DURAZNO AVE

72	EL PASO J.A.G., INC.	ALEX CASTRO	EL PASO, TX 79905-1302
73	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST SAN DIEGO, CA 92121-1544
74	DOOR ADO EQUIPMENT SPECIALTIES, CORP.	JO ANN MEDINA	CALLE FERNANDEZ JUNCOS EDIFICIO PLAZA CENTRO CAROLINA, PR 00986-
75	ELEVATOR REPAIR SERVICE INC	JAY STAFFORD	4250 N SAM HOUSTON PKWY E STE 100 HOUSTON, TX 77032-3885
76	COMPUTER SITES INC	JOHN ANDERSON	1225 S HURON ST DENVER, CO 80223-3108
77	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	MARGINAL CARR. 2 KM 111.3 INT. BO. MORA ISABELA, PR 00662-
78	BSE PERFORMANCE, LLC	ROBIN SOBEY	22471 N 82ND AVE PEORIA, AZ 85383-2169
79	GEM MECHANICAL SERVICES INC	DREW SILICH	5101 BIRNEY HWY ASTON, PA 19014-1592
80	EVCO PARTNERS LP	EMILY MARKS	2701 PALMER HWY TEXAS CITY, TX 77590-6938
81	ASPHALT PLUS, INC.	MELINDA OEDEKOVEN	425 JOHNSON LN BILLINGS, MT 59101-6714
82	IAN CORPORATION	JIHYUNG CHONG	1129 ROUTE 15 BARRIGADA, GU 96913-
83	ALEXTON INCORPORATED	SOPHIA MARNELL	8210 CINDER BED RD STE 2 LORTON, VA 22079-1136
84	MGS CONSTRUCTION SERVICES INC	DIANE SANDERS	1500 ENTERPRISE DR STE 308 LEMOORE, CA 93245-9074
85	WRIGGLESWORTH ENTERPRISES INC	WENDY WRIGGLESWORTH	3516 S COLLEGE RD WILMINGTON, NC 28412-0912
86	TEJAS PREMIER BUILDING CONTRACTOR, INC	JULISSA CARIELO	1811 S LAREDO ST SAN ANTONIO, TX 78207-7019
87	DEVINE INSULATION INC	MARK DEVINE	11485 RICH HILL RD NORTH EAST, PA 16428-5814
88	WARNER SPECIALTY PRODUCTS, INC.	AMY NORTON	40 MONTOWESE AVE STE B NORTH HAVEN, CT 06473-3615
89	COMPETITIVE CHOICE, INC	AUNDREA YOUNG	9030 KIRBY DR HOUSTON, TX 77054-2504
			12015 TELEGRAPH RD

90	AIR FLO CLEANING SYSTEMS LLC	KALEEN MOZHAM	CARLETON, MI 48117-9761
91	POWERMASTER ELECTRIC INC	GINA FARTHING	311 JARCO DR FUQUAY VARINA, NC 27526-2901
92	GUARDIAN INDUSTRIAL SUPPLY, LLC	CHRISTINA DUNCAN	10629 METRIC BLVD AUSTIN, TX 78758-4520
93	BAIRCO CONSTRUCTION INC	STACY BAIR	1164 ROAD 7 LOVELL, WY 82431-9627
94	FEDERAL PROFESSIONAL SOLUTIONS, INC.	MARCY ANDERSON	820 CAMERON ST ALEXANDRIA, VA 22314-2410
95	KAU INC	KATHRYN WALDRON	4208 ROSEMONT LN FREDERICKSBURG, VA 22408-1962
96	MHK TECHNOLOGIES INC	SUSAN ROACH	225 VINE ST STE 1 JOHNSTOWN, PA 15901-1518
97	MRH SUPPLY, INC.	MARY ROSE HILDEN	26273 SW LABROUSSE RD SHERWOOD, OR 97140-8941
98	AULI`I CONSTRUCTION, INC.	MICHAEL CHUN	46-042 PUULAU PL KANEOHE, HI 96744-3542
99	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	401 HANOVER ST FREDERICKSBURG, VA 22401-5936
100	GAINESVILLE PLUMBING LLC	JANIS JONES	4258 BURROUGH DR STE 201 VINT HILL FARMS, VA 20187-4010
101	ONEILL CONTRACTORS INC	KANEY ONEILL	4307 REGENCY DR GLENVIEW, IL 60025-5209
102	GLOBE BUILDERS, INC.	ANGELINA RODRIGUEZ CHAVEZ	3009 PERSHING DR APT 1 EL PASO, TX 79903-2534
103	PUERTO RICO WATER MANAGEMENT INC	LUZ OTERO	216 CALLE DEL VALLE SAN JUAN, PR 00911-2328
104	ADSYNC TECHNOLOGIES, INC.	JANE ADKINSON	201 S F ST PENSACOLA, FL 32502-4527
105	ALLOY CRANE & MACHINERY LLC	KELLY MACMILLAN	1618 DEAN FOREST RD GARDEN CITY, GA 31408-9558
106	SECURITY WATCH INC	ARCHENA SHARMA	801 MYRTLE AVE STE 102 EL PASO, TX 79901-1599
107	M & R INSULATION SYSTEMS LLC	MARILYN DABRONZO DABRONZO	1790 YARDLEY LANGHORNE RD STE 107 YARDLEY, PA 19067-5530
108	BOSCO CONSTRUCTORS INC	ERIC ENRIQUEZ	34 PIN OAK DR DENVER, CO 80127-4327

109	CURRENT ELEVATOR TECHNOLOGY, INC.	TAMMY BOHLKE	129 MAPLE DR SHOHOLA, PA 18458-4112
110	DAWN INCORPORATED	DAWN OCHMAN	2861 SFERRA AVE NW WARREN, OH 44483-2273
111	IN AIR CONDITION, INC.	NELDYS ROSA NEGRON	BO. CEDRO ABAJO CARR. 811 KM. 2.0 NARANJITO, PR 00719-
112	ATWOOD HAY INCORPORATED	GLENDA HAY	321 ALTA VISTA AVE ROSEVILLE, CA 95678-1701
113	TRI COAST CONSTRUCTION, LLC	AMY ROBBINS	1507 TARA ST KELSO, WA 98626-5251
114	HYDRA ENGINEERING & CONSTRUCTION, LLC	LESLIE WEISS	36 JASPER THOMAS RD CRAWFORDVILLE, FL 32327-2324
115	ICD BUILDERS, INCORPORATED	CANDACE JOHNSON	202 12TH ST S APT 3 FARGO, ND 58103-1797
116	PANORAMA CONSULTING, INC.	SAMANTHA MCDANIEL	728 LAKE DR LAUREL HILL, FL 32567-3169
117	ZISKE-KRAFT WERKS INC	ANN MARIE ZISKE	92 COOPER AVE TONAWANDA, NY 14150-6650
118	ACORN SUPPLY AND DISTRIBUTING INC.	CATHERINE SCHULTZ	11167 PULASKI HWY WHITE MARSH, MD 21162-1819
119	EDGE SOLUTIONS LLC	ALICE REDDING	1523 ROYAL SPRINGS ST FAYETTEVILLE, NC 28312-9504
120	CECIL & CECIL ENTERPRISES INC	COREEN CECIL	3741 BUSINESS DR STE 100 SACRAMENTO, CA 95820-2178
121	ANNA LISA LUNA CONSTRUCTION, INC.	ANNA LUNA	1250 CRUZERO ST OJAI, CA 93023-3819
122	ADVANCED MANAGEMENT GROUP, L.L.C.	JESSICA LAWRENCE	1116 SOUTH ST TITUSVILLE, FL 32780-4052
123	FIBER BUSINESS SOLUTIONS GROUP INC	CINDY GALLO	3019 W GERMANTOWN PIKE NORRISTOWN, PA 19403-1002
124	RAND & JONES ENTERPRISES CO, INC	JOAN YANG	18 TRACY ST STE A BUFFALO, NY 14201-2344
125	PROVEN MANAGEMENT LLC	DENITA CONWAY	1255 UNION ST NE STE 700 WASHINGTON, DC 20002-8494
126	KELLY CONSTRUCTION SERVICES INC.	KELLY FISHER	55 MAIN ST STE 5102A ENFIELD, CT 06082-3359
127	KBT CONTRACTING CORP	REBECCA TIMMONS	5105 BLANDING BLVD JACKSONVILLE, FL 32210-7839

128	FCN INC	ROBERT BROSEY	12501 ARDENNES AVE STE 101 ROCKVILLE, MD 20852-1741
129	CLAYTON CO CONSULTANTS LLC	ANNIE CLAYTON	2033 FLESHER AVE JACKSONVILLE, FL 32207-3519
130	MAGADIA CONSULTING INC	MAGDALENA GEBREKRISTOS	1734 ELTON RD STE 200 SILVER SPRING, MD 20903-5717
131	MV7 INC	JACQUELINE MATTIACCIO	8804 FIELDFLOWER LN TAMPA, FL 33635-6258
132	GALE CONSTRUCTION COMPANY OF ILLINOIS	LAURA PAGER	51 W JACKSON ST STE 230 JOLIET, IL 60432-1729
133	T&B PAINTING CO INC.	IRMA BUMPAS	1023 THIRD AVE CHULA VISTA, CA 91911-2008
134	DIAMOND RIDGE DEVELOPMENT CORPORATION	JEFFREY GREEN	6098 N 57TH AVE GLENDALE, AZ 85301-7762
135	GUNTER CONSTRUCTION CO	CHRISTINA GUNTER	520 DIVISION ST KANSAS CITY, KS 66103-1904
136	B & B CRANE SERVICE LLC	MEGAN POWELL	5007 NORTHSIDE DR SHALLOTTE, NC 28470-4461
137	DEL RIO ENTERPRISES INC	KEVIN GARCIA	4201 ELLISON ST NE ALBUQUERQUE, NM 87109-4503
138	SOUTHWESTERN DAKOTAH INC	JESSYCA FOVARGUE	3148 S CHRYSLER AVE TUCSON, AZ 85713-5463
139	8-KOI INC	INGA YOUNG	2725 CENTER PLACE MELBOURNE, FL 32940-7106
140	GCJ INC	GINGER SEPULVEDA	3508 SHAMROCK WAY STE 101 TRACY, CA 95377-9204
141	OUTSIDE BOX LLC	CANDICE SOMERVILLE	1428 FLOYD AVE RICHMOND, VA 23220-4618
142	PAULA F PRICE ENTERPRISES LLC	PAULA PRICE	507 W MARTINTOWN RD NORTH AUGUSTA, SC 29841-3108
143	MACK GLOBAL LLC	ROBIN MACK	4121 MYLAN RD RICHMOND, VA 23223-2258
144	CITI APPROVED ENTERPRISE, LLC	INGRID THIBODEAUX	2439 MANHATTAN BLVD STE 5052 HARVEY, LA 70058-5328
145	FUTURE CONTROLS, INC	THOMAS HANSEN, JR.	5719 ZIP DR UNIT 1 FORT MYERS, FL 33905-5036
			70 INDUSTRIAL PARK DR STE 3E

146	DECORA INC	DENISE OGRADY	WALDORF, MD 20602-3739
147	HOSPITALITY LOGISTICS CONCEPT LLC	BASSEL SHUBASSI	9951 OAKTON TERRACE RD OAKTON, VA 22124-2939
148	KIRA CONSTRUCTION, INC	RALPH COX	1248 VIA VISTA FALLBROOK, CA 92028-3738
149	GREEN AND SUSTAINABLE SERVICES, LLC	CHARLOTTE SMITH	2421 AMYX RANCH DR PONDER, TX 76259-8032
150	GREEN WORLD CONTRACTING CORP	HENRIETTA O'BRIEN	67 RIVER AVE NATRONA HEIGHTS, PA 15065-2609
151	MASSILLON CONSTRUCTION AND SUPPLY LLC	THERESA CARR	1245 RAFF RD SW CANTON, OH 44710-1455
152	DYNAMIK, INC.	JESSE FELTEN	3990 OLD TOWN AVE, SUITE C107 SAN DIEGO, CA 92110-2968
153	DAWSON'S REALTY & MORTGAGES, INC.	LABRESCIA DAWSON	3775 VENTURE DR STE 200 DULUTH, GA 30096-5102
154	D&S INTERNATIONAL, LLC	MARLENE CAMAN	5004 BRIGHTON AVE KANSAS CITY, MO 64130-3109
155	ECOSERVICES LLC	LINDA DENENNO	303B NATIONAL RD EXTON, PA 19341-2647
156	MAC GC-ELECTRIC, INC.	ARAUNAUD TEO	10439 ROSELLE ST STE A SAN DIEGO, CA 92121-1544
157	INSULATION, LLC		
158	R&I CONSTRUCTION, INC.	IRENE WONG	98-1771 NAHELE ST AIEA, HI 96701-1724
159	OER SERVICES LLC	ALI ZAIMI	615 E APPLETREE LN ARLINGTON HEIGHTS, IL 60004-2607
160	D BURKE MECHANICAL CORP	JOANNE BRENTON	1925 TANDEM NORCO, CA 92860-3608
161	TOOTLE CONSTRUCTION, LLC	LINDA TOOTLE	1712 SUNWOOD DR LONGWOOD, FL 32779-2791
162	ADELAIDE SERVICES LLC	SELENA ALEMAN	118 BROADWAY ST STE 614 SAN ANTONIO, TX 78205-2007
163	EACM CORP	SOLANGIE ARROYO	20 MERIDIAN RD STE 1 EATONTOWN, NJ 07724-2270
164	TCB SERVICES, LLC	JAMES MCCLELLAN	11360 SE COUNTY ROAD 319 TRENTON, FL 32693-2672
165	CALSON CONSTRUCTION CORP	CAROLINE CALCAGNI	34 OAKDALE AVE JOHNSTON, RI 02919-5315
			150 OSIGIAN BLVD STE 400

166	F3 SOLUTIONS LLC	PARRISH SWEARINGEN	WARNER ROBINS, GA 31088-8969
167	US ECO PRODUCTS CORP	DOREEN BLADES	143 ESSEX ST STE 210 HAVERHILL, MA 01832-5553
168	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	708 W HAZELWOOD ST PHOENIX, AZ 85013-2643
169	COMP ENVIRONMENTAL, INC.	YANLING CAROLINE WANG	5615 RECKER HWY WINTER HAVEN, FL 33880-1267
170	SCHWARZ CONSTRUCTION LLC	KAREN SCHWARZ	9 SASSAFRASS LN FLORENCE, KY 41042-8849
171	BATIR ARCHITECTURE LTD	PAULA PRICE	1121 E MAIN STREET SAINT CHARLES, IL 60174-2205
172	AMALGAMATED SERVICES, INC.	KAREN RIFFICE	21024 S 80TH AVE FRANKFORT, IL 60423-9186
173	JCJ CHAVEZ CONSTRUCTION INC	MARILUPE CHAVEZ	115 S GOLD CANYON ST RIDGECREST, CA 93555-4121
174	M&K GENERAL CONTRACTORS INC	KARLA FRESE	1368 WOODEN VALLEY ST CHULA VISTA, CA 91913-2936
175	VANESSA ACIERTO	VANESSA ACIERTO	LOT 25-1 664 CHALAN PALE RAMON HAYA ROUTE 1 YIGO, GU 96929-2417
176	RK & G CONSTRUCTION INC	ROSA KINYON	1533 W BETTERAVIA RD SANTA MARIA, CA 93455-1027
177	THE GEMINI 3 GROUP, INC.	LINDA BLAKEMORE	50 TECH PKWY STE 107 STAFFORD, VA 22556-8615
178	ARGENT WORLD SERVICES LLC	LAURA MILLER	4701 FM 2920 RD SPRING, TX 77388-3160
179	ABHZEEN DESIGN INC	BHAVESH NAIK	34 SCHOOL RD E MARLBORO, NJ 07746-2056
180	GC GREEN, INCORPORATED	ELIZABETH PEREZ	102 SHELL DR SAN CLEMENTE, CA 92672-3652
181	SERVITECH, INC.	JIM BARKER	13892 E SMITH DR AURORA, CO 80011-2248
182	K WATSON GROUP LLC	KAREN WATSON	10834 OLD MILL RD STE 4 OMAHA, NE 68154-2648
183	GENECO TECHNOLOGIES, LLC	AMYE AMERINE	236 AIR BASE RD TYE, TX 79563-2322
184	BARTKOWSKI LIFE SAFETY CORP	LAUREN SUSTEK	140 W 168TH ST SOUTH HOLLAND, IL 60473-2839
	FOUR WINDS MECHANICAL HTC/AC		8915 ADAMS ST NE STE B

185	INC.	CHAULING ARMIJO	ALBUQUERQUE, NM 87113-2714
186	C. ORTIZ, CORP	CARMEN ORTIZ	4021 JOHNSON AVE EL PASO, TX 79930-6816
187	FIRELAKE CONSTRUCTION INC	JACKIE FOLEY	1011 E 31ST ST LAWRENCE, KS 66046-5103
188	BGESH INCORPORATED	WESTON HALLIBURTON	21943 DIAMOND CHASE STE 200 SAN ANTONIO, TX 78259-2743
189	ASHLAND INDUSTRIAL SERVICES, LLC	SHAWN CLASING	15842 ELM DR NEW FREEDOM, PA 17349-9400
190	GRANITE COMMERCIAL REAL ESTATE LLC	MEGAN PRIETO GIOKAS	30 TEMPLE ST STE 300 NASHUA, NH 03060-2412
191	BRENCO SUPPLY, INC.	KAREN LOYD	210 DAVIDSON DR STE B HOT SPRINGS NATIONAL PARK, AR 71901-9331
192	TSJ CONSTRUCTION, LLC	TREVOR ROWLEY	870 E 300 N CLEVELAND, UT 84518-
193	SITE MANAGEMENT ASSISTANCE LLC	KIMKO DOWELS	718 18TH ST MERIDIAN, MS 39301-3547
194	R & M GOVERNMENT SERVICES INC	RALPH ARCHETTI	650 MONTANA AVE STE A LAS CRUCES, NM 88001-4294
195	BECKRICH CONSTRUCTION, LLC.	JEFF RICHARDS	8855 WHISPERING PINE TRL COLORADO SPRINGS, CO 80908-3514
196	TL STINSON & ASSOCIATES LLC	TAMIKA CHURCHILL	6216 BENTGRASS PL LOCUST GROVE, GA 30248-7064
197	SHELVING AND FILING CONCEPTS, LLC	WANDA RACHAL	405 SAINT CLAIR RD BOYCE, LA 71409-9022
198	ACCENTZ, INC.	FARHA KHAN	6695 S QUEMOY CIR AURORA, CO 80016-2686
199	SUNAGO SUPPLY CORPORATION	ETTA TUCKER	2914 VILLA LAKE DR POWDER SPRINGS, GA 30127-5049
200	CM CONSTRUCTION SERVICES, INC.	MONIQUE MIRON	8300 W DOE AVE VISALIA, CA 93291-9261
201	PROFICIENT CONSTRUCTORS LLC.	IRIS LUNA	2026 S CALLAGHAN RD SAN ANTONIO, TX 78227-2265
202	THE PLUMBING SHOP, INC	PERIDOT DAVIS	1121 FLAMINGO DR AUSTELL, GA 30168-6109
			75 S MAIN ST

203	CINTEOT INC.	CHRISTINA HUNT	CHAMBERSBURG, PA 17201-2224
204	CHAD PODY CONSTRUCTION COMPANY, L.L.C.	ANGELA PODY	275 GOODGOIN RD RUSTON, LA 71270-8730
205	DE LA HOZ BUILDERS, INC.	HILDA DE LA HOZ	1 N ORANGE ST FELLSMERE, FL 32948-6638
206	KLUZ INTERNATIONAL CORPORATION	INES KLUZ	220 N TUSTIN AVE SANTA ANA, CA 92705-3807
207	PROSPERITUS SOLUTIONS LLC	KRYSTAL NERIO	1014 PEABODY AVE SAN ANTONIO, TX 78211-2844
208	ASPIRYON LLC	NEIL CRISMAN	7600 CHEVY CHASE DR SUITE 300 AUSTIN, TX 78752-1599
209	MINATOISHI PALUMBO ARCHITECTS, INC.	LORRAINE MINATOISHI	1003 BISHOP ST STE 1975 HONOLULU, HI 96813-6461
210	ALZA ELECTRICAL CORP	ANTONIO BARRON	13700 GUERRERO DR EL PASO, TX 79928-5642
211	EXECUTIVES LLC	YURI BLANCO	46 EAGLE RIVER ST STE 130 EAGLE, ID 83616-6593
212	IDEAL SYSTEM SOLUTIONS, INC.	SHELIA HERSHEY	12 ROCKY SLOPE DR SANTA FE, NM 87508-1353
213	EAST COAST TECHNOLOGIES, LLC	SCOTT ANDERSON	303 W MADISON ST BALTIMORE, MD 21201-4614
214	STERILE SERVICES CO	FANIA CARTER	445 NW 54TH ST MIAMI, FL 33127-1921
215	CIN-G CONTRACTING LLC	CINDY GONZALES	5285 W LOUISIANA AVE LAKEWOOD, CO 80232-5938
216	MDM MAC ENTERPRISES INC	DENISE MCINTYRE	319 ELMHURST DR WAXHAW, NC 28173-6058
217	SUGAR SHORES CONSTRUCTION LLC	TAMESHA EVERS	14 LIVE OAK ST STE A7 GULF BREEZE, FL 32561-4484
218	FORWARD MOTION GROUP HOLDINGS LLC	CAROLYN BOTERO	15600 NW 15TH AVE STE E MIAMI, FL 33169-
219	LOSHAW THERMAL TECHNOLOGY LLC	MARCI BITTNER	59 N MAIN ST SPRING GROVE, PA 17362-1013
220	HORIZON SOLUTION COMPANY	JESSICA DERENBERGER	311 ADAMS ST RAEFORD, NC 28376-2701
221	HD INC.	JANET HURLEY	6391 AVIATION CIR LOVELAND, CO 80538-9000
	PREMIER MECHANICAL PRODUCTS		6601 KANSAS AVE

222	LLC	ASHLEY TUMBERGER	KANSAS CITY, KS 66111-2314
223	THE HAND TRUCK COMPANY, LLC	JUDITH KOCHEVAR	1221 BERWIND AVE PUEBLO, CO 81006-1001
224	CHIPPEWA STONE LLC	BONNIE GRAVES	3 RYDER RD WHITEHALL, NY 12887-1805
225	SUSTAINABLE FACILITIES MANAGEMENT SERVICES, LLC	WILLIAM MCAFEE	238 MADISON ST NW WASHINGTON, DC 20011-2223
226	MSAB, LLC	LAURA KNIGHT	400 PERRY PKWY PERRY, GA 31069-9246
227	DARBONNIER TACTICAL SUPPLY LLC	BRITTNI DARBONNIER	951 NE 21ST CT OAK HARBOR, WA 98277-2715
228	SAWYER SERVICES INC	KIM SAWYER	56851 GRATIOT AVE CHESTERFIELD, MI 48051-1308
229	RELIANT ELEVATOR INSPECTIONS & CONSULTING, INC.	SHARYN FRICKE	5020 RUNNING BROOK DR JOSHUA, TX 76058-5760
230	BEST VALUE MANAGEMENT, LLC	BRENDA CAMPBELL	1225 W BEAVER ST STE 12306 JACKSONVILLE, FL 32204-1414
231	LEDAMARK INC	PHYLLIS STEPHENS	977 LOWER HATCHER CREEK RD STANTON, KY 40380-9765
232	ARMITAGE ARCHITECTURE INC.	PENNY ARMITAGE	6512 MAIN ST WILLIAMSVILLE, NY 14221-5836
233	TVS DISTRIBUTORS INC	VERA SAPP	2822 E OLYMPIC BLVD LOS ANGELES, CA 90023-3412
234	KRIAANET INC	DEEPALI JAIN	722 E. MARKET ST. SUITE 102 OFC A29 LEESBURG, VA 20176-3375
235	ARCH SYSTEMS LLC	VINI EHSAN	1800 WASHINGTON BLVD STE 421 BALTIMORE, MD 21230-1735
236	SONCOAST PROCUREMENT, LLC	RACHANA IYENGAR	1716 KELLEY AVE KISSIMMEE, FL 34744-3300
237	COMP ENVIRONMENTAL INC	CAROLINE WANG	4701 SANGAMORE RD STE N100 BETHESDA, MD 20816-2558
238	DREAM DESIGN & CONSTRUCTION, INC	LEANN WILKES	1101 IDLEWILD AVE GREEN COVE SPRINGS, FL 32043-3903
239	PAULSON PLUMBING & MECHANICAL, LLC	PAULETTE BACA	1211 4TH ST SW ALBUQUERQUE, NM 87102-4368
240	CB CONSTRUCTION SERVICES, INC	DENISE BARKER	275 BIG ROCK DR DOVER, PA 17315-2132
			3542 N UTAH ST

241	BLOOMSBURIE LLC	KINHA LESTER	ARLINGTON, VA 22207-4444
242	B & H INTERNATIONAL LLC	TASNEEM KATABJI	10303 ASCOT CROSSING ST BAKERSFIELD, CA 93311-4961
243	CUSTOM IT SERVICES LLC	CHERYL SCHEUERMAN	957 VIA VANNUCCI WAY HENDERSON, NV 89011-0106
244	VANGUARD PACIFIC LLC	SYDNEY CODY	14051 COUNTY ROAD 9 FOLEY, AL 36535-8318
245	SUNWEST ENGINEERING CONSTRUCTORS, INC	MICAELA KISSICK	4780 CHEYENNE WAY CHINO, CA 91710-5531
246	ADAPT CONSULTING LLC	LISA LOWERY	598 REDWOOD RD SARATOGA SPRINGS, UT 84045-9603
247	JIM JAM, INC.	JAMES GALLET	11003 W 59TH TER SHAWNEE, KS 66203-2956
248	GRENLAR HOLDINGS, INC	KALEN GRENZEBACH	16636 SIMONDS RD NE KENMORE, WA 98028-4413
249	MIA GENERAL CONTRACTING LLC	BRANDY DODD	4221A HIGHWAY 90 MILTON, FL 32571-2011
250	MX CONSTRUCTION, INC.	TIFFANY AMEZCUA	720 S FRONTAGE RD STE 106 NIPOMO, CA 93444-5626
251	SH MECHANICAL INC.	KERLITA HACKER	231 TRAVIS CT SUISUN CITY, CA 94585-2441
252	CF SOLUTIONS LLC	ESKEDAR YESHIWAS	404 HAUPT SQ SE LEESBURG, VA 20175-2722
253	DARI CONCEPTS LLC	ANGELA KILIC-CAVE	8623 DIXIE PL MCLEAN, VA 22102-1537
254	ROCK SOLID SOLUTIONS, LLC	ROLANDA AMOS	2124 CLIFF DR NASHVILLE, TN 37218-2814
255	WITHIN INTERIOR DESIGN, INC.	Heather Robinson	205 N WATER ST ELIZABETH CITY, NC 27909-4417
256	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	504 CAPITAL CIR SE STE A TALLAHASSEE, FL 32301-3807
257	WILCOX & DYER, LLC	KEITH WILCOX	9412 TASKER RD LAKE ODESSA, MI 48849-9741
258	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	YESENIA CORDERO	1118 BRADFIELD RD ABINGTON, PA 19001-4205
259	ADDON SERVICES LLC	PRITA ABRAHAM	300 MEMORIAL FIELD DR HOPKINSVILLE, KY 42240-8075
260	EASTERN POWER TECHNOLOGIES INC	ROD TURNAGE	215 PELHAM DAVIS CIR GREENVILLE, SC 29615-5753

261	Z SQUARED BUILDERS INC.	LOURDES MALAEKEH	5039 ROBERT J MATHEWS PKWY # 400 EL DORADO HILLS, CA 95762-5752
262	TITAN ASSOCIATES GROUP INC.	TANYA LEONARD	1891 INGLESIDE AVE ATHENS, TN 37303-2193
263	GWO, INC.	MIRION GREEN	832 CAMBRIDGE AVE MATTESON, IL 60443-1855
264	TERA CONSULTING INC.	KHURRAM BAJWA	29 ELVES LN LEVITTOWN, NY 11756-5522
265	DOFINE SPRINKLER REBUILDERS INC	DALLES DUFFIN	218 W 13TH ST BURLEY, ID 83318-1602
266	LD SUPPLY, LLC	LISA D'ALESSIO	925 HALE PL STE A6 CHULA VISTA, CA 91914-3507
267	EMC, LLC	JOAN HICKS	205 SCOTT AVE GLEN BURNIE, MD 21060-7759
268	RIVETER ENTERPRISES	CARLA STEPHANY	919 W CUCHARRAS ST STE 130 COLORADO SPRINGS, CO 80905-1646
269	NRK CONSTRUCTION, LLC	NORISHA GLOVER	700 N 10TH ST STE 200 BATON ROUGE, LA 70802-4508
270	EMPOWER CONTRACTING INC.	YOLANDA VALDES	1361 BROOKLYN BLVD BAY SHORE, NY 11706-4008
271	DOLIVEIRA SYSTEMS LLC	JAMIE DOLIVEIRA	1237 PENN AVE STE 200 HOLLSOPPLE, PA 15935-7348
272	GLOBAL QUALITY SOLUTIONS, INC.	ADRIANA BLANKENSHIP	7235 BENTLEY RD STE 930 JACKSONVILLE, FL 32256-7565
273	OUTSIDE THE BOX LLC	CANDICE SOMERVILLE	433 EXETER DR BIRMINGHAM, AL 35206-2845
274	NISOU ENTERPRISES INC	NIHARIKA SHASTRI	37279 ASPEN DR FARMINGTON HILLS, MI 48335-5479
275	GULF COAST SOLUTIONS LLC	YVETTE BREAZEALE	12300 BIG CREEK RD GULFPORT, MS 39503-7306
276	MASHIMA ELECTRIC LLC	KATHRYN MASHIMA	91-1012 IPOLANI ST APT A KAPOLEI, HI 96707-3062
277	BUSYWOMAN, LLC		
278	COX-MORGAN & ASSOCIATES, LLC	DONETH MORGAN	6015 CHESTER CIR STE 202 JACKSONVILLE, FL 32217-2273
279	G1 CONSTRUCTION, INC.	TORRI GALAVIZ	352 UNIVERSITY AVE SW UNIT N113 ATLANTA, GA 30310-3673
			17406 E 425 RD

280	NATIVE STAR GROUP, INC	JOSH PETERSON	JAY, OK 74346-3735
281	JNV GROUP	VADIM JOHNSON	5018 SIENNA LN SACRAMENTO, CA 95835-2058
282	MAKRO CORP.	LAURA GONZALEZ	1761 CARR 8838 SAN JUAN, PR 00926-2741
283	NV SERVICES LLC	NEYSSA VARELA	URB. LAS LOMAS BLOQUE U3 #3 SAN JUAN, PR 00921-
284	DUCO, LLC	MJ DUBOIS	8238 INGLETON CIR EASTON, MD 21601-5044
285	WOODSTOCK CONSTRUCTION GROUP LTD.	LISA MONJARDO	41 LUDLAM AVE BAYVILLE, NY 11709-3203
286	COMP ENVIRONMENTAL INC	YANLING CAROLINE WANG	6731 WHITTIER AVE STE B-230 MC LEAN, VA 22101-4525
287	MYNATT BUSINESS SERVICES LLC	CASSANDRA MYNATT	5019 CURTIS DR BIRMINGHAM, AL 35215-4049
288	ALEXANDER PACIFIC INC.	LAURIE WARD	91-1210 KAIKOHOLA ST EWA BEACH, HI 96706-6231
289	RNN ARCHITECTS, INC	REBECA ARISTIZABAL	2930 S WOLFF ST DENVER, CO 80236-2013
290	NATIVE INDUSTRIES LLC	MONIQUE JOHNSON	1349 BAYVILLE COURT APT 5 NORFOLK, VA 23503-1057
291	CONTRACTING & COMMUNICATIONS SERVICES, INC.	GINA TYSHING	107 ENGLEFIELD DR GAITHERSBURG, MD 20878-2661
292	AVCOR CONSTRUCTION, LLC	AMANDA POWERS	10684 HIGHWAY 319 AUSTIN, AR 72007-9485
293	STEELMAN BUILD & CONSTRUCTION INC	AISHA THOMPSON	523 N INDIAN HILL BLVD CLAREMONT, CA 91711-4347
294	POWER INNOVATIONS INC	KIMBERLY KELLY	2725 WALNUT ST MCKEESPORT, PA 15132-7066
295	BUCKET PRO LLC	CHEYENNE BROOKS	1898 BUFFALO ST OLEAN, NY 14760-1142
296	QUEST POWER INTERNATIONAL, LLC	PATRICIA ARAUZ-CORROW	36 W PINE ST STE 202C ORLANDO, FL 32801-2612
297	BLUE CONSTRUCTION SERVICES LLC	SEPTEMBER BLUE	633 YORK LN SE LEESBURG, VA 20175-4017
298	ACCESS COMMUNICATIONS GROUP LLC	ANA ESPINOZA ENRIQUEZ	198 PALOMA MESA RD ANTHONY, NM 88021-8640
			6397 PINE RD

299	LEGACY PRODUCT SUPPORT LLC.	JACKIE PULEO	THOMASVILLE, PA 17364-9578
300	ALL MOBILITY PUERTO RICO INC	MAIRYM HERNANDEZ RIVERA	CARR 838 KM 1 HM 8 INT SECTOR MELIA LEON GUAYNABO, PR 00969-
301	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	615 BARONNE ST STE 205 NEW ORLEANS, LA 70113-1016
302	ATHENA CONSTRUCTION GROUP, INC.	AMBER PEEBLES	4203 WOODCOCK DR STE 265 SAN ANTONIO, TX 78228-1312
303	INTEGRATED GLOBAL STAFFING, LLC	JESSICA HOLLOWAY	602 N COLORADO ST STE 110 KENNEWICK, WA 99336-7825
304	JACKSON SOLUTIONS, LLC	KAREN DONAHUE	587 PIAZZA PT OVIEDO, FL 32765-5411
305	CINKA CONSTRUCTION & CONSULTING SERVICES LLC	CYNTHIA MARTIN	307 SAINT KITTS LOOP SAINT AUGUSTINE, FL 32092-1181
306	CPS SOLUTIONS LLC	TERI STACH	1398 LONG MDW SALADO, TX 76571-6000
307	MCG CONTRACTS LLC	VELMA SIMMONS	4031 NW BETHEL RD BRISTOL, FL 32321-2206
308	KERNS CONSTRUCTION, LLC	ASHLEI KERNS	5366 W PECAN RD LAVEEN, AZ 85339-2456
309	M PATTERSON SERVICES LLC	MICHELE PATTERSON	3001 READING AVE HAMMONTON, NJ 08037-8002
310	EVANS INDUSTRIAL CONSTRUCTION, LLC	PATRICIA EVANS	2775 SOUTHGATE DR SUMTER, SC 29154-8099
311	MGS CONSTRUCTION SERVICES INC.	DIANE SANDERS	310 E TAYLOR DR SALLISAW, OK 74955-1927
312	VANGUARD PACIFIC LLC	SYDNEY CODY	2207 GARNET AVE STE N SAN DIEGO, CA 92109-3713
313	ILLUSTRIOUS CONSULTANTS, LLC	KAHLIA MEEKS	2106 RENAISSANCE WAY NE ATLANTA, GA 30308-2461
314	DIAMOND CAPTURE ASSOCIATES LLC	BARBARA RIVERA	8192 LOST CREEK LN DELRAY BEACH, FL 33446-0022
315	LAKEY, INC OF TEXAS	FELICIA LAKEY	104 CONSTITUTION DR STE D ALEXANDRIA, LA 71303-3539
316	POSHNFIT LLC	TYANIEKA JACKSON	17910 VAN DYKE ST STE 1073 DETROIT, MI 48234-3954
317	GOVPARTS LLC	CHAD ROSS	1810 S ANTHONY BLVD FORT WAYNE, IN 46803-3606
			2 LAWSON AVE

318	CEDAR PARK GROUP INC	SAMANTHA TERLINE	UNIT 11 EAST ROCKAWAY, NY 11518-1700
319	DUMOUR SERVICES LLC	JACQUELINE PERKINS	201 CRATER WOODS CT PETERSBURG, VA 23805-9100
320	SOUTH ALABAMA CONTRACTING LLC	TRACY SIMPLER	1829 E THREE NOTCH ST ANDALUSIA, AL 36421-2403
321	INDUSTRIAL STRENGTH INDUSTRIES LLC	ARA BASMAJIAN	732 SOUND VIEW RD OYSTER BAY, NY 11771-1114
322	GIACORP CONTRACTING INC	LISA WALTER CALICCHIA	11 BRADHURST AVE HAWTHORNE, NY 10532-2135
323	RK STRATEGIC MANAGEMENT SOLUTIONS LLC	JENNIFER HEINZ	3911 IH 10 E #HM SAN ANTONIO, TX 78219-4002
324	ARBOR CORPORATION INC	NIDHI PURI	3112 SPRING HOLLOW CT ANN ARBOR, MI 48105-9217
325	ELEVATED ENTRANCES INC	BRANDY DIETZ	2155 VICTOR PL COLORADO SPRINGS, CO 80915-1506
326	IRON AUTOMATION & FABRICATION LLC	MIRANDA JONES	2527 S 215TH DR BUCKEYE, AZ 85326-5932
327	PED CONCEPTS INC.	KELLEY PITTMAN	10752 DEERWOOD PARK BLVD SOUTH WATERVIEW II STE 100 JACKSONVILLE, FL 32246-
328	BRAVE ONE CONTRACT AGENCY, LLC	RAFFA GIBBARD	402 S FULTON ST SALISBURY, NC 28144-4832
329	WTA CONTRACTORS LLC	TAMERA PREACHER	607 CHEROKEE DR NORTH AUGUSTA, SC 29841-4785
330	US TRAINING CONSULTANTS LLC	JENNIFER SCHMOYER	19 MYRTLE RD HONESDALE, PA 18431-2430
331	CAPITAL SERVICES LLC	VERONICA NIEVES	8TH STREET SECTOR BECHARA LOTE D SAN JUAN, PR 00920
332	D 3 CONSTRUCTION SERVICES, INC.	CLAUDIA THOMPSON	7002 VIA MARIPOSA SUR BONSALL, CA 92003-5621
333	GLOBAL REGISTRATIONS LLC	VERA CHAWLA	10423 WILLOWBROOK DR POTOMAC, MD 20854-4477
334	BROOKES CONSTRUCTION LLC	CHISA BROOKES	3202 WILKINSON BLVD #667492 CHARLOTTE, NC 28208-5659
335	STILES GENERAL CONTRACTORS LLC	ADELIZ STILES	6505 ANGORA LOOP ST S EL PASO, TX 79934-
	COPELAND CONTRACTING		1425 UNIVERSAL CITY BLVD BLDG 3

336	COMPANY INC	ELSA NIEVES BROWN	SAN ANTONIO, TX 78148-3364
337	RENO/TAHOE REALTY GROUP LLC	SARAH CARMONA ZINK	232 ANACAPA ST STE 2C SANTA BARBARA, CA 93101-1841
338	L.J.V. DEVELOPMENT, LLC	LISETH VELEZ	50 MILK ST FL 16 BOSTON, MA 02109-5002
339	EAGLE FEDERAL CONSTRUCTION LLC	SHEENA JONES	600 ELDREDGE AVE CAPE MAY, NJ 08204-
340	AUTOMATIC DOOR SOLUTIONS LLC	EMILY / ANDREW BUMAN	19602 153RD AVE E ORTING, WA 98360-9496
341	SPEARS CONSTRUCTION GROUP INC	KAREN SPEARS	7688 SW JACK JAMES DR STUART, FL 34997-7239
342	H. A. FERNOT CO., INC.	RANDY MITCHELL	32 KULICK RD FAIRFIELD, NJ 07004-3308
343	ELITE BUSINESS STRATEGIES, LLC	PRINCESS OUSLEY	111 N ORANGE AVE STE 1020 ORLANDO, FL 32801-2399
344	DEBORA SMITH ENERGY PARTNERS INC	JOHN BACHOLZKY	4455 MAIN ST BROWN CITY, MI 48416-9701
345	DAP CONSTRUCTION MANAGEMENT LLC	ALICIA HERNANDEZ	2304 RED BLUFF RD EL PASO, TX 79930-1724
346	NIKKI'S ETC. L.L.C.	NAKIA JONES	3501 HOLIDAY DR STE 311 NEW ORLEANS, LA 70114-8283
347	NOVA BUILDING SOLUTIONS LLC	NADINE VILLANUEVA	27103 E ONTARIO PL AURORA, CO 80016-7514
348	ADAPT CONSULTING LLC	LISA LOWERY	17645 E OLD CHERRY RD DEWEY, AZ 86327-7315
349	ZBS & ASSOCIATES LLC	TANISHA JEWELL	510 PLAZA DRIVE STE 1245 ATLANTA, GA 30349-7239
350	ADDON SERVICES LLC	PRITA ABRAHAM	1800 DIAGONAL RD STE 600 ALEXANDRIA, VA 22314-2840
351	J CAYE PREMIER DINING INC	JENNA NORWOOD	302 SYDNOR ST HOUSTON, TX 77020-6043
352	2LYONS AEROSPACE LLC	MIKE CANTAVE	3329 NW 55TH ST FORT LAUDERDALE, FL 33309-6306
353	WILLIAMSVILLE RESOURCES II, INC.	NATHANIEL PETTIFORD	17711 E STRACK DRIVE #100 SPRING, TX 77379-5215
	ENGINEERING SYSTEMS AND		11438 CRONRIDGE DR STE O

354	PRODUCTS LLC	JANINE MERTZ	OWINGS MILLS, MD 21117-2225
355	GREYSTONE SERVICES LLC	FAIZAH SAYED	6195 LEWIS AVE TOLEDO, OH 43612-4341
356	GLOBAL QUALITY SOLUTIONS, INC.	Adriana Blankenship	4525 S SANDHILL RD STE 103 LAS VEGAS, NV 89121-5955
357	TVRDY 8 LLC	KELLY TVRDY BENES	6221 S 90TH ST STE A OMAHA, NE 68127-4054
358	AXC INNOVATIONS INC	ANH THU DOAN	1312 E GUAVA AVE LOMPOC, CA 93436-6213
359	PISB GROUP LLC	JENNIFER COOK	121 CROWDERS CREEK RD GASTONIA, NC 28052-9787
360	E.K. MANAGEMENT, L.L.C.	EDNA KEEFE	909 EMILY CIR FORT WALTON BEACH, FL 32547-1980
361	CARRASCO PROJECT MANAGEMENT CPM- LLC	SANDRA CARRASCO	6433 VUELTA VENTURA SANTA FE, NM 87507-7127
362	ALTERNATIVE COATINGS SOLUTIONS, INC.	ANGELICA IBARRA	30032 CIELO MESA TEMECULA, CA 92592-5105
363	AANTILIA LLC	PRIYAL AGRAWAL	701 TILLERY ST STE 12 AUSTIN, TX 78702-3751
364	HD INC	JANET HURLEY	3116 E LYNDALE AVE HELENA, MT 59601-6445
365	ON THE GO MEDICAL SUPPLY LLC	NICOLE WILSON	2626 S LOOP W STE 238 HOUSTON, TX 77054-5643
366	M.K. MOORE & SONS, INC	ANTHONY MOORE	5150 WAGNER FORD RD DAYTON, OH 45414-3662
367	VANGUARD PACIFIC LLC	SYDNEY CODY	119 W GARDEN ST PENSACOLA, FL 32502-5617
368	NORTHERN STONE CARVING LLC	MARGARET MOORE	211 SAINT ANTHONY PKWY STE B9 MINNEAPOLIS, MN 55418-4862
369	TLI CONSTRUCTION, INC.	CINDY LINCICOME	3610 CENTRAL AVE STE 400 RIVERSIDE, CA 92506-5907
370	SAPPHIRE HYDRAULICS INC	SARAH SAPIR	227 HIGHWAY 90A W ROSENBERG, TX 77471-8838
371	SILVER-SMITH DEVELOPMENT, LLC	PAMELA JONES-SMITH	1196 CAPITAL CIR NE STE A TALLAHASSEE, FL 32301-3531
372	TECHNION CONTRACTORS TCI, INC.	FRAN AMKRAUT	7618 JELLICO AVE NORTHRIDGE, CA 91325-4509
	ACCESS COMMUNICATIONS		5470 S MONROVIA AVE

373	GROUP LLC	ANA ESPINOZA ENRIQUEZ	TUCSON, AZ 85706-2120
374	SCHUBERT DIANA	DIANA SCHUBERT	3255 DESERT SAGE DR LAKE HAVASU CITY, AZ 86404-2768
375	AVANTE CONSTRUCTION INC	YOKO LARKIN	9380 ACTIVITY RD STE J SAN DIEGO, CA 92126-4413
376	CFS MEDICAL SUPPLIES AND EQUIPMENT, INC	TARA SLAUGHTER	2114 REDONDO BEACH BLVD TORRANCE, CA 90504-1616
377	FILLMORE CONTRACTS, LLC	KIMBERLY KIDD	2330 SCENIC HWY S STE 203 SNELLVILLE, GA 30078-3115
378	MJAG CONSTRUCTION SERVICES, LLC	FELICIA WHITE	10019 S 10TH ST BELLEVUE, NE 68123-4014
379	WINFIELD, LLC	KELLY REEVES	132 INDUSTRIAL BLVD HOUMA, LA 70363-6800
380	MERIT MECHANICAL CO	COURTNEY PLUNKETT	17813 EDISON AVE STE 102 CHESTERFIELD, MO 63005-1252
381	COMMERCIAL CONTRACTORS LLC	AMY TAMANAHA	151 ROSE ST APT A WAHIAWA, HI 96786-2365
382	PATTERSON PRECISION MANUFACTURING INC	LESLIE PATTERSON	1188 E BROADWAY AVE NORTON SHORES, MI 49444-2356
383	PRODIGY CONTRACTING, LLC		
384	ALPHAVETS, INC	CYNTHIA SPRAGG	15 LIBERTY ST E STE A YORK, SC 29745-1546
385	FRANKIE SOFIA LLC	RITA DELUCCIA	3195 VALHALLA DR BRONX, NY 10465-1343
386	DONNATHEPILOT, LLC	DONNA ENGELBRECHT	6 FAIRWAY RD JACKSONVILLE BEACH, FL 32250-2635
387	LABOR SERVICE MANAGEMENT CO	LAURA SCOTT	20 MINE BROOK RD COLTS NECK, NJ 07722-1749
388	BUSINESS PREP, LLC	MONIQUE MUNRO	5159 POOKS HILL RD APT 1410 BETHESDA, MD 20814-5605
389	LALINI ENTERPRISES LLC	LALINI PILLAY	1400 MONTAGUE ST NW WASHINGTON, DC 20011-2870
390	SKO ENTERPRISES INC	STEPHANIE TAYLOR	1485 S DOG EAR DR COALVILLE, UT 84017-5555
391	UPHILL CONSTRUCTION LLC	EVANGULARNETTE RICHARDS	121 W MARKET ST GREENWOOD, MS 38930-4431

392	SOUTHERNBELLE ROOM, LLC	JAMILLA CURTIS	2001 MARTIN LUTHER KING JR DR SW STE 430B ATLANTA, GA 30310-5806
393	KAY/LIN ASSOCIATES, LLC		
394	BLUE, ELAINE	ELAINE BLUE	1545 QUADRILLE CT RIVERSIDE, CA 92503-7221
395	ALLIE BRIDGE ENERGY SOLUTIONS	REBECCA WETZSTEIN	1343 N GRAND AVE STE 210 COVINA, CA 91724-4043
396	TRUEDGE SOLUTIONS, LLC	SUNG CHOI	744 CALABRIA LANE AMBLER, PA 19002-1539
397	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
398	HONEST ELEVATOR LLC	MARY CRAMER	11407 SWEET HALL WAY MECHANICSVILLE, VA 23116-4907
399	FMS PROVIDER LLC	LAURA SAPIR	2276 SW 183RD TER MIRAMAR, FL 33029-5253
400	JMC HOMES & GENERAL CONTRACTING, LLC	RHONDA CAGLE	390 RACETRACK RD MCDONOUGH, GA 30252-1022
401	OSPREY ADVANTAGE SOLUTIONS LLC	MARIA CARO	133 RIVER RUN QUEENSTOWN, MD 21658-1642
402	PARKER CONSTRUCTION ENTERPRISES INC	JULIETTE PARKER	5284 GOLD TREE CT ORLANDO, FL 32808-1772
403	MAUKA CONTRACTING LLC	AMBER STRONG	3084 POIPU RD KOLOA, HI 96756-9573
404	BOYD AND WEEKS LLC	SUBRENA TUMBLIN	21223 BAILEYWOOD DRIVE RICHMOND, TX 77407-1015
405	DIAMOND MANAGEMENT LLC	RICHARD BLECHER	4 EVANS CIR POQUOSON, VA 23662-1606
406	FREEDOM FLEUR LLC	KIRSTIE HORTON	1033 DEMONBREUN ST STE 300 NASHVILLE, TN 37203-4512
407	LOPEZ-GUERRA CONSTRUCTION LLC	CAMILA RICH	8400 OSUNA RD NE STE 3A ALBUQUERQUE, NM 87111-2070
408	AJB CONSTRUCTION INC	DAN CARROLL	26077 NELSON WAY STE 1306 KATY, TX 77494-6699
409	WAVCOMM	PENNY RYAN	1429 S CUCAMONGA AVE ONTARIO, CA 91761-4510
			124 KAULANA WAY

410	ADDON SERVICES LLC	PRITA ABRAHAM	HONOLULU, HI 96821-2531
411	MARIE, LLC	WILL HEWITT	12744 KINGSTON PIKE, SUITE 201 KNOXVILLE, TN 37934-0942
412	WESTERN SUPPLIES INC	MARY ELLIS	1090 RIFLE RANGE RD IOWA PARK, TX 76367-7008
413	DANU LLC	KATHLEEN MCCAULEY	536 MANOR CIR FOLSOM, PA 19033-3121
414	BGM HOMES LLC	JASMINE THORNTON	2801 LOIS LANE ROWLETT, TX 75088-4955
415	FREEDOM CONSTRUCTION AND CONSULTING INC.	BRENDAN TULLY	1015 GODFREY AVE SW GRAND RAPIDS, MI 49503-5005
416	TLI CONSTRUCTION, INC.	CYNTHIA LINCICOME	7900 EAST UNION AVENUE SUITE 1100 DENVER, CO 80237-2746
417	LSHADDAI CONSULTING LLC	CHIQUITA SPEARS	5404 RUE NICOLE BAKER, LA 70714-8017
418	SOLAR STEP LLC	LOURDES MARCANO	REPARTO TERESITA U-10 CALLE 20 BAYAMON, PR 00961-8352
419	BEINDUSTRIAL LLC	LISANDRA BERRIOS	URB LAS RAMBLAS 33 CALLE MIRO GUAYNABO, PR 00969-1022
420	TEFERA INVESTMENT GROUP LLC	ROSEMARY TEFERA	125 SW CAMPUS DR APT 1106 FEDERAL WAY, WA 98023-8313
421	RED HILLS PARTNERS LLC	MELISSA OGLESBY	7805 BRIARCREEK RD N TALLAHASSEE, FL 32312-3661
422	ALL AMERICAN FEDERAL CONSTRUCTION LLC	MONIQUE EADDY	27202 STONE HARBOUR LN KATY, TX 77494-3691
423	CHRISTINA'S CONSTRUCTION SERVICES, LLC	CHRISTINA MASCHIETTO	3805 6TH ST BROOKLYN, MD 21225-2103
424	IKWEBAY LLC	KHARA LADUCER	814 CHIEF LITTLE SHELL ST BELCOURT, ND 58316-
425	G.M. HILL ENGINEERING, INC.	GINA HILL	283 CONSTITUTION DR SUITE 903 VIRGINIA BEACH, VA 23462-6722
426	JO-KELL INC	JOHN KELLY	6255 PRESCOTT CT CHINO, CA 91710-7112
427	MELANIE HARRIS	MELANIE HARRIS	1147 PICKETS RIDGE DR LOCUST GROVE, GA 30248-2847

428	LLC		
429	G1 CONSTRUCTION INC	TORRI GALAVIZ	976 BRADY AVE NW STE 100 ATLANTA, GA 30318
430	SAGA CONSTRUCTION LLC	DEANN HOWELL	3811 HIGHWAY 431 HEFLIN, AL 36264-3135
431	YERKES SOUTH INC	CHRISTINE YERKES	5605 N MACARTHUR BLVD STE 1066 IRVING, TX 75038-2617
432	YOUR AUTOMATIC DOOR COMPANY	NANCY LASITER	3379 S MAUXFERRY RD FRANKLIN, IN 46131-8149
433	A TASTE OF NEW ORLEANS CATERING LLC	JACQUELINE ERNST	1211 SUNDROP DR MANSFIELD, TX 76063-1687
434	DUNNS LOGISTICS INC	STACY DUNN	10614 SENTINEL DRIVE SAN ANTONIO, TX 78217-3812
435	C.M. PRODUCTS LLC	JOYLYNN WAGANER	4124 EHLMANN RD SAINT PETERS, MO 63376-6456
436	DODD ENTERPRISES INTERNATIONAL LLC	KANDICE DODD	6412 OYSTER ISLAND CV APOLLO BEACH, FL 33572-2507
437	SHEYENE TECHNOLOGY INC	SHEYENE GERARDI	276 5TH AVE RM 704 NEW YORK, NY 10001-4527
438	TBS LLC	YELIZ LAUREANO	1479 ASHFORD AVE. CONDADO DEL MAR A 18 SAN JUAN, PR 00907-1583
439	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP	KIMBERLY VARGAS	801 AVE FERNANDEZ JUNCOS ESQ SAGRADO CORAZON APART COND THE CITY SAN JUAN, PR 00901-
440	VIRTUAL ACCOUNTING GROUP INC	FABIENNE GLEMAUD	5907 HEAVENWOOD DR SE MABLETON, GA 30126-3689
441	SUCCESS DS, INC.	DANIELA SUCCURRO	8302 NW 68TH ST MIAMI, FL 33166-2655
442	CREE8IVE WHOLESALE INTL LLC	LUCRESIA DOOMES	4916 CHEROKEE WAY SE CONYERS, GA 30094-4536
443	GENCO GENERAL CONTRACTORS OF PUERTO RICO CORP.	LEIAH LEON	1420 CELEBRATION BLVD KISSIMMEE, FL 34747-5159
444	THE TRANSPORT COMPANY CORP	AMRITA ALI	8268 KILMER CIR SACRAMENTO, CA 95828-5604
445	NEW ERA DEVELOPMENT GROUP LLC	GRACEANN PALMISANO	68 35TH ST # C559 BROOKLYN, NY 11232-2019
			752 CHAMBERS ST

446	FM CIBORT LLC	FRANK CIBORT	HARRISBURG, PA 17113-1705
447	CITIZEN CONTRACTING GROUP LLC	JAMIE WINBURY	12607 E 60TH ST STE C TULSA, OK 74146-6929
448	CIERRA GROUP INC.	JENNIFER CIERRA GOMEZ	10565 FAIRFAX BLVD STE 202 FAIRFAX, VA 22030-3104
449	KT CONTRACTING & CONSTRUCTION LLC	KOURTNEY ARMSTRONG	13035 COUNTY ROAD 809 SWEENY, TX 77480-8264
450	ROYAL T SERVICES LLC		
451	REDFEATHER SOLUTIONS LLC	ALYSSA GARCIA	7400 CATFISH CT FALLON, NV 89406-7102
452	JO-KELL INC	JOHN KELLY	641 NE 26TH CT POMPANO BEACH, FL 33064-
453	GILL SQUARED FOR VETS LLC	MICHELLE GILL	200 GILL DR CLINTON, MS 39056-9643
454	EMERGENCY RESPONSE TEAM LLC		
455	PERRY CONTRACTING, LLC	DAISY CULVERHOUSE-PERRY	63 EDMAN LN FAIRMONT, WV 26554-7638
456	ROYAL STYLES, CORP.	KARINA MEDVEDEVA	3060 OCEAN AVE #1S BROOKLYN, NY 11235-3310
457	WEST COAST MECHANICAL INSULATION, INC.	LISA CHOATE	470 S HILLVIEW DR MILPITAS, CA 95035-5464
458	RDMC LLC	VALERIE GRAVES	10563 WESTCLIFF PL HIGHLANDS RANCH, CO 80130-6916
459	A & D EQUIPMENT INC	DONNA LAFATA	522 S HOOP POLE RD GUILFORD, CT 06437-1223
460	SHADES OF PARADISE LLC	MARILOU POLENDEY-SCOTT	150M E ADDENG ST DEDEDO, GU 96929-6561
461	SGI CONSTRUCTION LLC	ANGELA GOMEZ	1124 E GABRILLA DR CASA GRANDE, AZ 85122-6794
462	AEGIS, LLC	BEVERLY JERMAN	7252 KAYLA BETH CT OOLTEWAH, TN 37363-6271
463	KRAEMER CONTRACTING GROUP, INC.	CHRISTINE KRAEMER	603 COUNTRY CLUB DR STE A BENSENVILLE, IL 60106-1329
464	GLOBAL BEAMS INC.	ATIQA BHATTI	138 W. ARBOR CAMP CIR SPRING, TX 77389-5323
465	SUPPLY ON THE GO LLC	ROSSANNA CAMURUNGAN	3186 STATE ROUTE 27 STE 106 KENDALL PARK, NJ 08824-1513
			11228 STAGESTONE WAY

466	ALH DYNAMICS LLC	IMAN HOLMES	MANASSAS, VA 20109-7620
467	RED BALL EXPEDITERS LLC	DAVIDA NELUMS	223 N MAIN ST STE 105 SIKESTON, MO 63801-4211
468	TOBACCO RIDGE INC	ALLISON MOTSINGER	3888 REID ROAD TOBACCOVILLE, NC 27050-9416
469	KOHTLER ELEVATOR INDUSTRIES, INC.	VERONICA QUERALES	4111 NW 132ND ST UNIT E OPA LOCKA, FL 33054-4538
470	BUTTERFLY REALTY, LLC	TACHIKA PARKS	3175 MILLS CREEK CIR UNIT 5001 SCOTTDALE, GA 30079-4522
471	PROPERTY SCOPE INC	ANN FANGMAN	324 E MAIN ST UNIT 301 LOUISVILLE, KY 40202-1288
472	ADDON SERVICES LLC	PRITA ABRAHAM	27789 MOUND RD STE 200 WARREN, MI 48092-2697
473	M & T CONSTRUCTION AND PAINTING LLC	TATJANA GOTOVAC	7879 AIRWAY PARK DR APT C1 MOBILE, AL 36608-9695
474	SOLA CONTRACTING LLC	RUTH DUNN	4017 N CLAIBORNE AVE NEW ORLEANS, LA 70117-5223
475	PHD LLC	LEE RUDOLPH	4275 E 30TH PL STE B YUMA, AZ 85365-7570
476	AC GREEN LLC	CLAIRE GREEN	6648 HUDNELL RD ATHENS, OH 45701-8952
477	PREMIER PRODUCTION EQUIPMENT INC	STACEY SPIEGEL	6168 TURNERSVILLE RD CREEDMOOR, TX 78610-3920
478	C&R CONTRACTORS LLC	CAROL CANTRELL	1499 TRESTLE CV HORN LAKE, MS 38637-8525
479	YOUNG ELEVATOR INCORPORATED	KRISTINA CHAVEZ	1415 LAUREN LN #101 CALDWELL, ID 83605-5426
480	NO SWEAT KC LLC	MISTY DIXON	1451 NW 800TH RD HOLDEN, MO 64040-8419
481	HPS ENTERPRISES, LLC	BELINDA HOPSON	511 DEBBY LANE ADAMSVILLE, AL 35005-2111
482	GREEN STAR TECH LLC	SELAM DESTA	722 E MARKET ST STE 102 #V56 LEESBURG, VA 20176-4475
483	THE MAINSITE GROUP CORPORATION	KANDICE MERRICK	1507 MCARTHUR DRIVE DUNCANVILLE, TX 75137-4221
484	GEN L ELEVATOR, LLC	JACLYN LINEHAN	1504 DARCEY LANE DAVIDSONVILLE, MD 21035-1712

485	WALLA WATER INC	MCKENZIE LOVELACE	7400 W ARROWHEAD AVE KENNEWICK, WA 99336-1122
486	BUILDING ENVELOPE ASSESSMENT & REPAIR, LLC	CASEY BAKER	2290 TECHNICAL PKWY STE A CHARLESTON, SC 29406-4993
487	TRIANGLE GENERAL CONTRACTORS, INC.	DERVISH NIVOKAZI	39 COFFEY ST BROOKLYN, NY 11231-1509
488	TDSNSA LLC	TABITHA SPREWELL	4021 PERCIVAL RD APT 624 COLUMBIA, SC 29229-8367
489	APEX VENTURE LEAGUE LLC	MILTON AARON	4800 WOODFORD CIR BESSEMER, AL 35022-6995
490	SANDERS & SONS, LLC	SONYA PARTRIDGE	102 N. MAIN ST ENTERPRISE, AL 36330-2537
491	WEST OHIO TOOL CO	KACI KING	7311 WORLD CLASS DR RUSSELLS POINT, OH 43348-9593
492	E-QUAL CONSTRUCTION LLC	ERIKA FLORES	3 CHAD RD PERALTA, NM 87042-8486
493	TYNES PROPERTY MANAGEMENT LLC	KANDICE TYNES	1878 GRANDSTAND DR SAN ANTONIO, TX 78238-4507
494	EUNIQUE INVESTMENTS LLC	EUNICE STOCKDALE	1042 OLD BRECKENRIDGE LN MONTGOMERY, AL 36117-8960
495	CINKA CONSTRUCTION AND CONSULTING SERVICES LLC	CYNTHIA MARTIN	11746 LAKEWAY DR CURTICE, OH 43412-9411
496	SERVICE LIVING LLC		
497	BLUE CLAE, LLC	RACHAEL WATSON	113 PROSPERITY AVE SE UNIT F LEESBURG, VA 20175-4157
498	ROADRUNNER EXPRESS CONSULTING, LLC	SHAREE LEGREE	2699 1/2 BEACHWOOD DR SUITE 4053 LOS ANGELES, CA 90068-2339
499	SYNCOR CONSULTING LLC	CRYSTAL BABB	1231 WALKERS WAY SAN ANTONIO, TX 78216-7714
500	WHEELHOUSE INDUSTRIES LLC	MARGARETANN MARKO	36 RED SCHOOL HOUSE RD LEBANON, NJ 08833-3227
501	VERONICA KEARNEY REAL ESTATE SERVICES, LLC	VERONICA KEARNEY	1508 OLD WATKINS RD RALEIGH, NC 27616-8540
502	SPARKLE ENTERPRISES LLC	SPARKLE CAMILLE SANDERS	14300 OAKLAND CT GRANDVIEW, MO 64030-2251
503	LD POWER INC	MARCY BLAIR	14440 MERIDIAN ROAD ELBERT, CO 80106-8811
504	TDP PROFESSIONALS, LLC	TERESA PHILLIPS	5990 KING WAY WALK LITHONIA, GA 30058-6172
			19123 JADE CANYON LN

505	TR&J LLC	THARESA FLORES	TOMBALL, TX 77377-7620
506	GH PARTS & COMPONENTS, INC.	HOPE PATTERSON	2409 N BROAD ST SELMA, AL 36701-4010
507	AMBER WILLIAMS CAPITAL LLC	AMBER WILLIAMS	102 E 5TH AVE AUGUSTA, KS 67010-1010
508	GD RESOURCES LLC	BASSO GHEE	502 KARN PL BRUNSWICK, MD 21716-1265
509	H & H CONSTRUCTION SERVICES OF FLORIDA, LLC	RHONDA HERRINGTON	10356 SHORECREST ROAD BILOXI, MS 36532-
510	BISHOP CLEAN CARE INC	JENNY SAVELLE	234 CEDRIC ST LEESBURG, GA 31763-4993
511	DEPENDABLE BUILDING SERVICES, INC	JANETTE TOMASELLI	1125 TOWER RD SCHAUMBURG, IL 60173-4305
512	C & L PUMP SERVICE, INC.	LUIS MAGALLANES	11227 PELLICANO DR STE B EL PASO, TX 79935-5303
513	SUNSTONE GLOBAL LLC	SHENA RAMNARINE	120 DELAWARE RD ABILENE, TX 79607-1110
514	RUSTY BUCKET CONSTRUCTION LLC	SHIRLEY ESCOBAR	614 E OVINGTON ST LANCASTER, CA 93535-3201
515	DUCE MADISON & ASSOCIATES	SHONITA HAWKINS-DODD	2 POST OFFICE RD STE 3B WALDORF, MD 20602-2726
516	J & J ELEVATOR SERVICES, INC.	JOYCE DEBROT	13412 E 249TH ST PECULIAR, MO 64078-8964
517	ALTA SOURCING PARTNERS LLC	MICHELLE ZELASKO	805 NORTH PAULINA AVENUE REDONDO BEACH, CA 90277-2250
518	COOLING COMPONENTS, INC.	ELIZABETH STREETER	69 N GORE AVE SAINT LOUIS, MO 63119-2330
519	ASCEND GLOBAL SUPPORT LLC	SEPEHR ARAGHI	4304 REDWOOD HIGHWAY STE 200 SAN RAFAEL, CA 94903-2103
520	INDUST LLC	SUSAN ARMBRUSTER	4037 FRANCES BERKELEY WILLIAMSBURG, VA 23188-1399
521	CLL SPECIALISTS CORP	CAROL LOVELESS	11925 STARCREST DR SAN ANTONIO, TX 78247-4111
522	PHARMA PARAPLUIE LLC	ABIDAH OTTLEY	7736 W GRANADA RD PHOENIX, AZ 85035-5066
523	RADFORD OVERHEAD DOORS INC.	EMILY SOULIOTES	9185 CHESAPEAKE DR SAN DIEGO, CA 92123-1002

524	TRD LOGISTICS LLC	DEANNA TIPTON	5172 CATES AVE SAINT LOUIS, MO 63108-1018
525	MIDWEST MILLWRIGHT SERVICES INC	MERRI CRUZ	3025 WALLIN AVE ROCKFORD, IL 61101-3447
526	FITZ ASSOCIATES LLC	JESUS URIBE	1955 FM 2001 STE 420 BUDA, TX 78610-2043
527	FLEXOVEYOR INDUSTRIES, INC.	TERESA GAGNA	3795 PARIS STREET UNIT B&C DENVER, CO 80239-3368
528	AMB CONTRACTING LLC	AVA BOWLES	7813 ALHAMBRA BLVD MIRAMAR, FL 33023-
529	RED FEATHER FEDERAL, LLC	MELISSA COOPER	2313 S BROADWAY AVE OKLAHOMA CITY, OK 73109-6023
530	ARS PRIME LOGISTICS, LLC	DENISE SHERMAN	1840 WESTERN AVE ALBANY, NY 12203-4624
531	MURADO LLC		
532	ALLIED RESPONSE INC.	WHITNEY LINDSAY	3076 COLORADO DR COPPERAS COVE, TX 76522-3279
533	TAWAKKULL LLC	FATIMA ABUBAKAR	2204 RONALD DR WEST NORRITON, PA 19403-1353
534	FOSTERED VETERANS CORP	STEVEN MAATOUK	7301 N LINCOLN AVE STE 197 LINCOLNWOOD, IL 60712-1745
535	AFLUX INDUSTRIALS L.L.C.	SHAUNELLE SANDY	7127 GOBLET WAY CLINTON, MD 20735-5813
536	LP		
537	TEMPERED INSULATION INC	BARBARA SWEENEY	180 S MAIN ST STE 205 AMBLER, PA 19002-4753
538	SATURN ENTERPRISES, INC.	MARIA MENZIES	27 YORK DR FORT WORTH, TX 76134-2546
539	NEXGEN CONSTRUCTION GROUP LLC	MICHELE BROWN	216 N MARKET ST WAVERLY, OH 45690-1137
540	ATHENA SERVICE SOLUTIONS LIMITED LIABILITY COMPANY	PAULETTE MCKENZIE	20 GREGORY FARM RD EASTON, CT 06612-2049
541	AGILE PRIVATE ENTERPRISE LLC	TAWANNA SARGENT	1725 BLUE STREAM DR DESOTO, TX 75115-3962
542	SLIPSTREAM EDI LLC	PAULA O'SHEA	61316 BRIANNE PL BEND, OR 97702-3066
543	D&A CONTRACTING LLC	KAITLYN DASHER	2950 SUMNER WAY PALM HARBOR, FL 34684-1600
544	RAINTREE SOURCING & SUPPLY, LLC	NICOLE MILNER	4932 W SAINT CHARLES AVE LAKE CHARLES, LA 70605-6756

545	ELITE IRON AND ELECTRIC, INC.	JOLIN FERDINAND	303 W RADIO RD PALM SPRINGS, CA 92262-1631
546	ELECTRA GRID SOLUTIONS LLC	GLENDA THOMAS	2350 HIGHWAY 31 NW HARTSELLE, AL 35640-4238
547	TRUE PRIORITY LOGISTICS, LLC	TAMIA SMALLS	2128 BENT GRASS AVE OCOEE, FL 34761-4884
548	PROPERTY MANAGEMENT ENTERPRISES, INC.	JENNIFER WALTON	255 ROSE APPLE LN NAPLES, FL 34114-2555
549	LIMITLESS NETWORK & SECURITY SERVICES LLC	SARAH WHEELER	11014 HAZEL LN BENTON, AR 72019-8491
550	FLOW OPTIMIZERS, LLC	DEANNA NELSEN	119 LAKELOCH DR LIZELLA, GA 31052-3324
551	FEDERAL TACTICAL LLC	ANGELA TOPIC	1010 LAKE SHORE DR APT 104 WEST PALM BEACH, FL 33403-2862
552	ADVANTAGE CONTRACTING SOLUTIONS, LLC	SHANE HERNANDEZ	1613 S CHURCH ST SMITHFIELD, VA 23430-1831
553	ELITE EXPERTISE, LLC	DANIELLE NEAL	1055 S BASSETT ST DETROIT, MI 48217-1668
554	TERESA D KINSEY	TERESA KINSEY	522 HIGHWAY 534 MINDEN, LA 71055-7508
555	GARRETT MCKENZIE, INC	APRIL HUGHES	1775 N BUTTERFIELD RD LIBERTYVILLE, IL 60048-1238
556	SHERMEZ LOGISTICS LLC	SHERRIE GOMEZ	24841 SW 120TH PL HOMESTEAD, FL 33032-5979
557	TITAN INSULATION LLC	KEIRA CHRISTENSEN	494 RUSSELL ST WOBURN, MA 01801-5349
558	FMS CONSULTING LLC	FAITH SHARP	225 1ST AVE N UNIT 904 SAINT PETERSBURG, FL 33701-3589
559	COOPER'S CREDIT CONSULTING INTERNATIONAL LLC	ADRIANNE COOPER	2524 N BROADWAY STE 509 EDMOND, OK 73034-4172
560	JAI CONSTRUCTION, LLC	JENA DUROUSSEAU	5501 OPELOUSAS ST LAKE CHARLES, LA 70615-3031
561	ELLE LOGISTICS COMPANY, LLC	HORTENSE ELLE	2093 ARBROTH CT WALDORF, MD 20601-3787
562	OAKRIDGE LLC	JOHN FRUIT FRUIT	4131 CAMPANA CT LAS CRUCES, NM 88011-2004
563	GLOBA TEK LLC	GLORIMAR KULINSKI	1701 LUBBOCK DR COPPERAS COVE, TX 76522-2187
			22522 GINOSA TRL

564	PHOENIXX SOLUTIONS LLC	MARY OLATUNDE	KATY, TX 77449-6872
565	1626 CONSTRUCTION LLC	LOURDES NEGRON	1626 CALLE SAN MATEO APT 802 SAN JUAN, PR 00912-3829
566	R MEANS REALTY LLC	RASHEEDAH ABDULMATEEN	1339 HOLCOMB AVE ATLANTA, GA 30344-4330
567	RTD SERVICES, LLC	LETESHIA RAMSEY	12711 HANDLES PEAK WAY PEYTON, CO 80831-4465
568	MBAN INDUSTRIES LLC	ANNETTE ACHONDUH	3817 VALLARTA LN ROUND ROCK, TX 78681-2354
569	SOUTHRIDGE BUILDERS LLC	REBECCA BUILDERS	3989 CRATER LAKE HWY MEDFORD, OR 97504-9742
570	COX SEEDLINGS CONTRACTS LLC	TAMIRRAH COX	110 SUNRISE RIDGE DR SALISBURY, NC 28146-6927
571	STELLARS PRECISIONS LLC	SHONTERIA ROGERS	8735 DUNWOODY PL STE 5614 ATLANTA, GA 30350-2995
572	THE FOOT BULLY, L.L.C	KRYSTLE CAVINESS	8954 DAWNRIDGE DR HOUSTON, TX 77071-2446
573	BLUE GROUP LLC	DOUGLAS ANDERSON	1364 YOUNG CIR TWIN FALLS, ID 83301-3041
574	DCT SPECIALTY CONSTRUCTION LLC	JESSICA SARANTAKIS	8501 E BONNIE ROSE AVE SCOTTSDALE, AZ 85250-6717
575	JM DEMOLITION, LLC	DANNI TASSINARI-PEETZ	44 MAIN ST ALTON, NH 03809-4621
576	MILLENIACORE LLC	AMBER SIMPSON	208 MAPLE BRANCH COURT MERIDIANVILLE, AL 35759-2477
577	PIONEER EQUIPMENT RENTAL LLC	BRANDI MARTIN	17525 BROAD ST MONTVERDE, FL 34756-3202
578	J6 LEGACY, LLC	KATHERINE JOHNSON	3931 ROBINDALE DR DOUGLASVILLE, GA 30135-7272
579	HIGH VALLEY PRODUCTS, INC	GINNY LLEWELLYN	1134 W 850 N CENTERVILLE, UT 84014-3400
580	DMGZ CONSTRUCTION, LLC	NOEMI DOMINGUEZ	21840 BRIGGS COLEMAN RD HARLINGEN, TX 78550-1724
581	INNOVATIVE EQUIPMENT SOLUTIONS GROUP INC.		
582	7 POINT LLC	ALESHIA ROHRER	3900 ROYAL PALM DR SAINT JAMES CITY, FL 33956-2243
583	BEE PROMPT LLC	BELINDA GRAY	301 UNION STATION DR CALERA, AL 35040-8305
			10137 KINGHORN RD

584	SHACRIDDLE CONTRACTING, LLC	CRYSTAL KINGHORN	GLEN ST MARY, FL 32040-2459
585	BEKA'S SUPPLY COMPANY, LLC	REBEKAH RICH	2350 CYPRESS POND RD APT 1505 PALM HARBOR, FL 34683-1507
586	CINTEOT INC.	THOMAS HUNT	3000 PRESIDENTIAL DR STE 170 FAIRBORN, OH 45324-6817
587	VETS FIRE AND LIFE SAFETY, LLC	ERICKA OXFORD	7 SHERRI LN SAINT PETERS, MO 63376-2142
588	GREEN DESIGN TECHNOLOGIES, LLC	SPENCER PARKER	1952 HUNTINGTON HALL CT ATLANTA, GA 30338-5713
589	CAPROCK INDUSTRIAL LLC	TAZIA VAN JOHNSON	1100 W TOWN AND COUNTRY RD STE 1250 ORANGE, CA 92868-4633
590	ASTRALLIC INC.	HARIS MUNAWAR	6710 ELDERMILL LN GAINESVILLE, VA 20155-4435
591	LET US DO THIS, LLC	LISENNY RODRIGUEZ	1301 COPPER CT APT 1301 NEW WINDSOR, NY 12553-4504
592	ATT ELEVATOR CONSULTING LLC	ADELE MOLINARO	723 PINTA DR ST PETERSBURG, FL 33715-
593	K-EPPS LLC	KIM EPPS	251 STEVENS ST APPOMATTOX, VA 24522-8296
594	JO KELL INC	MARY KOPF	1010 W 19TH ST NATIONAL CITY, CA 91950-5410
595	G1 CONSTRUCTION INC.	TORRI GALAVIZ	3525 OLD CONEJO RD STE 119 NEWBURY PARK, CA 91320-6133

Notice of Opportunity



Jessica Monreal
To Jessica Monreal

Reply | Reply All | Forward | ...

Tue 5/6/2025 8:27 AM

Dear Vendor,

The Interlocal Purchasing System (TIPS) is required under Federal regulations to notify SBA vendors of our procurement solicitations. You were registered on the United States Small Business Administration website under one or more of the following NAICS Codes, 423830,333921,238290 which include the topic of this Solicitation.

The Interlocal Purchasing System (TIPS) has available now, at the link below, Solicitation 250502 Elevators and Servicing (2 Part with JOC. You are invited to participate.

https://tips.ionwave.net/HomePage.aspx

Please note that there is no specific project to award. TIPS utilizes IDIQ Contracts, where IDIQ is an abbreviation of the term "Indefinite Delivery/Indefinite Quantity". This is a type of contract that provides an indefinite quantity of supplies or services during a fixed period of time or for the life of the awarded agreement. This solicitation was issued as a prospective award for a pricing agreement to be used when a TIPS Member entity needs the goods or services offered under the agreement.

Thank you,

Jessica Monreal
Paralegal
Leon Alcala, PLLC
ESC Region 8/The Interlocal Purchasing System (TIPS)
4845 Highway 271 North
Pittsburg, TX,75686
Telephone: (866) 839-8477
Direct Line: (903) 575-2704
www.tips-usa.com

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Company Name	Contact Person	Mailing Address	City	State	Zip
ACUMEN ENTERPRISES, INC.	Wayne Boyter	PO BOX 673,	DESOTO	TX	75123-(
THE BUTLER ENTERPRISES	Cass Butler	104 E OVILLA RD,#2684	RED OAK	TX	75154-9
1ST CONSTRUCTION TRADES, LLC	Mike Jones	2021 GUADALUPE,STE. #260	AUSTIN	TX	78705-5
NORTHVIEW COMPANY LLC	Sarah Velten	6445 CEDAR SPRINGS RD,SUITE 213	DALLAS	TX	75235
EUPHORIA MOVING COMPANY	Victoria Bradley	3200 REXFORD DR,	AUSTIN	TX	78723-4
NEW LIFE INDUSTRIES, LLC	RODRICK ROBINSON	1402 S CUSTER RD,SUITE 504	MCKINNEY	TX	75072-1
OPTIMAL STRATEGIC SOLUTIONS	Robert Beasley	1277 JONES TRL,	LEWISVILLE	TX	75077-2
DENSITY6 LLC	Antonio T Smith Jr	16821 BUCCANEER LN,SUITE 200	HOUSTON	TX	77058-2
OPEN PRAIRIE PATRIOT ENTERPRISES LLC	Enrique Costas	121 SCENIC RIDGE DR,	WEATHERFORD	TX	76087-1
Mechanical Materials, LLC	Jackie Herrera	2250 Dickinson Ave,Building D	Dickinson	TX	77539-(
MAXA ELEVATOR SOLUTIONS, LLC	Xochitl P Aguilar	8310 BARKLEY ST,	HOUSTON	TX	77017-4

FIDIS SOLUTIONS GROUP, LLC	Antonia Murphy	5702 SPRING CYPRESS RD,SUITE C-7	SPRING	TX	77379-3
JS TOTAL SERVICE, INC.	Ivy M Lanier	478 TOWER ROAD,	SAN ANTONIO	TX	78223-6
K3 SALES AND SERVICES LLC	Jaclyn Hernandez	1321 S EDDY ST,	PECOS	TX	79772-5
TEJAS ELEVATOR CO.	Courtney Niemtschk	PO BOX 2172,	MANCHACA	TX	78652-2
ELEVATOR REPAIR SERVICE, INC.	Sandra Stafford	P.O. BOX 11037,	HOUSTON	TX	77293-1
JC BUILDING SOLUTIONS, LLC	Christy Crowson	3609 COUNTY ROAD 7660,	LUBBOCK	TX	79423-4
G2 CONSTRUCTION SERVICES, INC.	Jyl Gibson	3303 SHELL RD,SUITE 3	GEORGETOWN	TX	78628-9
PYTT SERVICE LLC	Stephanie Harris	13908 LYNDON B JOHNSON ST,	MANOR	TX	78653-4
MOVE SOLUTIONS, LTD.	Linda Monette	2201 CHEMSEARCH BLVD,	IRVING	TX	75062-6
PINION 91 CONTRACTING, LLC	John Gusti	15440 LANDING CREEK LN,	ROANOKE	TX	76262-3
RELIANT ELEVATOR INSPECTIONS & CONSULTIN	Shari Fricke	5020 RUNNING BROOK DRIVE,	JOSHUA	TX	76058-5
RIGHT CHOICE DEVELOPMENT AND CONSTRUCTIO	Danielle Wright	25626 SADDLEBROOK WAY,	KATY	TX	77494-5

LARGIN CONSTRUCTION SERVICES, LLC	President Jerry Jo Largin	6645 Long Meadow Dr.,	CORPUS CHRISTI	TX	78413-2
MID-TEX CONTRACTING LLC	GARY SIMS	2341 STATE HIGHWAY 22,	WHITNEY	TX	76692-3

HUB Notice of Opportunity



Jessica Monreal

To Jessica Monreal

Bcc 'wayne@acumen-enterprises.com'; 'cass@TheButlerEnterprises.com'; '1stcontructiontrades@gmail.com'; 'svelten@northviewco.com'; 'euphoriamovers@gmail.com'; 'RODRICK.ROBINSON@NEWLIFEHME.COM'; 'lewisbeasley381@gmail.com'; 'admin@densitysix.com'; 'partners@op2ellc.com'; 'Jackie@mechanicalmaterials.com'; 'maxaelevatorsolutions@gmail.com'; 'a.ramirez@fidis-s-group.com'; 'ivy@jstotalservice.com'; 'admin@k3salesandservices.com'; 'courtney@tejaselevator.com'; 'Sandie@elevatorsus.com'; **+9 others**

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Tue 5/6/2025 8:13 AM

Dear Vendor,

You were registered on the State of Texas CMBL website under one or more of the following NIGP codes, 295-00,910-13 which include the topic of the following solicitation.

The Interlocal Purchasing System (TIPS) has available now, at the link below, Solicitation 250502 Elevators and Servicing (2 Part with JOC). You are invited to participate.

https://tips.ionwave.net/CurrentSourcingEvents.aspx

Please note that there is no specific project to award. TIPS utilizes IDIQ Contracts, where IDIQ is an abbreviation of the term “Indefinite Delivery/Indefinite Quantity”. This is a type of contract that provides an indefinite quantity of supplies or services during a fixed period of time or for the life of the awarded agreement. This solicitation was issued as a prospective award for a pricing agreement to be used when a TIPS Member entity needs the goods or services offered under the agreement.

Thank you,

Jessica Monreal
Paralegal
Leon Alcala, PLLC
ESC Region 8/The Interlocal Purchasing System (TIPS)
4845 Highway 271 North
Pittsburg, TX,75686
Telephone: (866) 839-8477
Direct Line: (903) 575-2704
www.tips-usa.com

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Notice of Opportunity May 2025



Jessica Monreal
To ray@mbdadallas.com; admin@mbdadallas.com

Reply | Reply All | Forward | ...

Mon 5/5/2025 11:03 AM

Dear MBDA,

The Interlocal Purchasing System (TIPS) is required under Federal regulations to work with the MBDA in an effort to notify potential vendors of our procurement solicitations.

You are invited to notify and encourage the companies you assist to participate in these opportunities. TIPS present procurement solicitations are available at the following link:

https://www.tips-usa.com/rfp.cfm.

Thank you,

Jessica Monreal
Paralegal
Leon Alcala, PLLC
ESC Region 8/The Interlocal Purchasing System (TIPS)
4845 Highway 271 North
Pittsburg, TX,75686
Telephone: (866) 839-8477
Direct Line: (903) 575-2704
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TIPS VENDOR AGREEMENT (Part 2)

TIPS RCSP 250502 Elevators and Servicing (Part 2)

The following Vendor Agreement ("Agreement") creates a legal agreement between The Interlocal Purchasing System ("TIPS"), a government purchasing cooperative and Department of Texas Region 8 Education Service Center and (INSERT ENTITY NAME):

United Elevator Services, LLC

(ENTER ENTITY NAME)

its owners, agents, subsidiaries, and affiliates (together, "Vendor") (individually, "Party", and collectively the "Parties") and this agreement shall exclusively govern the contractual relationship ("Agreement") between the Parties for Part 2 of the related solicitation opportunity. If Vendor proposes and awarded on Part 1, a separate Part 1 Vendor Agreement shall control Part 1 terms.

TIPS, a governmental entity and a national purchasing cooperative seeks to provide a valuable and necessary solution to public entities and qualifying non-profits by performing the public procurement solicitation process and awarding compliant contracts to qualified vendors. Then, where the law of a customer's jurisdiction allows, instead of public entities and qualifying non-profits expending time, money, and resources on the extensive public procurement process, the use of TIPS allows public entities to quickly select and purchase their preferred products or services from qualified, competitively evaluated vendors through cooperative purchasing.

1. **Purpose.** The purpose of this Agreement is to identify the terms and conditions of the relationship between TIPS and Vendor. Public entities and qualifying non-profits that properly join or utilize TIPS ("TIPS Members") may elect to "piggyback" off of TIPS' procurements and agreements where the laws of their jurisdiction allow. TIPS Members are not contractual parties to this Agreement although terms and conditions of this Agreement may ensure benefits to TIPS Members.

2. **Authority.** The Parties agree that the signatories below are individual authorized to enter into this Agreement on behalf of their entity and that they are acting under due and proper authority under applicable law.

3. **Definitions.**

    a. **TIPS Pricing:** The specific pricing, coefficients, mark-ups, discounts, and other pricing terms and incentives which Vendor submitted and TIPS approved for each respective TIPS Contract awarded to Vendor and all permissible, subsequent pricing updates submitted by Vendor and accepted by TIPS, if any.

4. **Entire Agreement.** This Agreement resulted from TIPS posting a Part 2 "TIPS Solicitation" (RFP, RCSP, RFQ, or other) and Vendor submitting a proposal in response to that posted TIPS Solicitation for evaluation and award. The Parties agree that this Agreement consists of the provisions set forth herein and: (1) The Part 2 TIPS solicitation document resulting in this Agreement; (2) Any Part 2 addenda or clarifications issued in relation to the TIPS solicitation; (3) All Part 2 solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor's entire Part 2 proposal response to the TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, pricing, accepted responses to questions, and accepted written clarifications of Vendor's proposal, and; any properly included attachments to this Agreement. All documentation and information listed is hereby incorporated by reference as if set forth herein verbatim. In the event of conflict between the terms herein and one of the incorporated documents the terms and conditions herein shall control.

5. **Vendor's Specific Warranties, Terms, and License Agreements.** Because TIPS serves public entities and non-profits throughout the nation all of which are subject to specific laws and policies of their jurisdiction, as a matter of standard practice, TIPS does not typically accept a Vendor's specific "Sale Terms" (warranties, license agreements, master agreements, terms and conditions, etc.) on behalf of all TIPS Members. TIPS may permit Vendor to attach those to this Agreement to display to interested customers what terms may apply to their Supplemental Agreement with Vendor (if submitted by Vendor for that purpose). However, unless this term of the Agreement is negotiated and modified to state otherwise, those specific Sale Terms are not accepted by TIPS on behalf of all TIPS Members and each Member may choose whether to accept, negotiate, or reject those specific Sale Terms, which must be reflected in a separate agreement between Vendor and the Member in order to be effective.

6. **Vendor Identity and Contact Information.** It is Vendor's sole responsibility to ensure that all identifying vendor information (name, EIN, d/b/a's, etc.) and contact information is updated and current at all times within the TIPS eBid System and the TIPS Vendor Portal. It is Vendor's sole responsibility to confirm that all e-correspondence issued from tips-usa.com, ionwave.net, and tipsconstruction.com to Vendor's contacts are received and are not blocked by firewall or other technology security. Failure to permit receipt of

correspondence from these domains and failure to keep vendor identity and contact information current at all times during the life of the contract may cause loss of TIPS Sales, accumulating TIPS fees, missed rebid opportunities, lapse of TIPS Contract(s), and unnecessary collection or legal actions against Vendor. It is no defense to any of the foregoing or any breach of this Agreement that Vendor was not receiving TIPS' electronic communications issued by TIPS to Vendor's listed contacts.

7. **Initiation of TIPS Sales.** When a public entity initiates a purchase with Vendor, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Once verified, Vendor must include the TIPS Contract Number on all purchase communications and sales documents exchanged with the TIPS Member.

8. **TIPS Sales and Supplemental Agreements.** If awarded, when making a sale under this awarded contract, the terms of the specific TIPS order, including but not limited to: shipping, freight, insurance, delivery, fees, bonding, cost, delivery expectations and location, returns, refunds, terms, conditions, cancellations, defects, order assistance, etc., shall be controlled by the purchase agreement (Purchase Order, Contract, AIA Contract, Invoice, etc.) ("Supplemental Agreement" as used herein) entered into between the TIPS Member Customer and Vendor only. TIPS is not a party to any Supplemental Agreement. All Supplemental Agreements shall include Vendor's Name, as known to TIPS, and TIPS Contract Name and Number. Vendor accepts and understands that TIPS is not a legal party to TIPS Sales and Vendor is solely responsible for identifying fraud, mistakes, unacceptable terms, or misrepresentations for the specific order prior to accepting. Vendor agrees that any order issued from a customer to Vendor, even when processed through TIPS, constitutes a legal contract between the customer and Vendor only. When Vendor accepts or fulfills an order, even when processed through TIPS, Vendor is representing that Vendor has carefully reviewed the order for legality, authenticity, and accuracy and TIPS shall not be liable or responsible for the same. In the event of a conflict between the terms of this TIPS Vendor Agreement and those contained in any Supplemental Agreement, the provisions set forth herein shall control unless otherwise agreed to and authorized by the Parties in writing within the Supplemental Agreement. The Supplemental Agreement shall dictate the scope of services, the project delivery expectations, the scheduling of projects and milestones, the support requirements, and all other terms applicable to the specific sale(s) between the Vendor and the TIPS Member.

9. **Right of Refusal.** Vendor has the right not to sell to a TIPS Member under the awarded agreement at Vendor's discretion unless otherwise required by law.

10. **Reporting TIPS Sales**. If awarded on this TIPS Contract, for the duration of the contract, Vendor shall provide a RS Means line-item estimates to TIPS for each anticipated TIPS project or sale. TIPS Vendor shall never charge a TIPS Member a line-item charge or specific fee for providing an RS Means or estimate through the TIPS Program. When a TIPS Member Customer seeks a quote or proposal for a TIPS sale, Vendor shall always supply a line-item estimate to TIPS for review and approval. If awarded, Vendor must report all TIPS Sales to TIPS. If a TIPS sale is initiated by Vendor receiving a TIPS Member's purchase order from TIPS directly, Vendor may consider that specific TIPS Sale reported. Otherwise, with the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the line item quote and purchase order or similar purchase document (with Vendor's Name, as known to TIPS, the TIPS Contract Name and Number included, and authorized signatures on behalf of both the TIPS Member and Vendor) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion. Please refer to the TIPS Accounting FAQ's for more information about reporting sales and if you have further questions, contact the Accounting Team at accounting@tips-usa.com.

11. **TIPS Administration Fees.** The collection of administrative fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The administration fee ("TIPS Administration Fee") is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of the amount paid by the TIPS Member for each TIPS Sale, less shipping cost, bond cost, and taxes if applicable and identifiable, which is legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published in the corresponding solicitation and is incorporated herein by reference. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member, not on the Vendor's cost or on the amount for which the Vendor sold the item to a dealer or Authorized Reseller. Upon receipt of payment for a TIPS Sale, including partial payment (which renders TIPS Administration Fees immediately due), Vendor shall issue to TIPS the corresponding TIPS Administration Fee payment as soon as possible but not later than thirty-one calendar days following Vendor's receipt of payment. Vendor shall pay TIPS via check unless otherwise agreed to by the Parties in writing. Vendor shall include clear documentation with the issued payment dictating to which sale(s) the amount should be applied. Vendor may create a

payment report within their TIPS Vendor Portal which is the preferred documentation dictating to which TIPS Sale(s) the amount should be applied. Failure to pay all TIPS Administration Fees pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion as well as the initiation of collection and legal actions by TIPS against Vendor to the extent permitted by law. Any overpayment of participation fees to TIPS by Vendor will be refunded to the Vendor within ninety (90) days of receipt of notification if TIPS receives written notification of the overpayment not later than the expiration of six (6) months from the date of overpayment and TIPS determines that the amount was not legally due to TIPS pursuant to this agreement and applicable law. Any notification of overpayment received by TIPS after the expiration of six (6) months from the date that TIPS received the payment will render the overpayment non-refundable. Region 8 ESC and TIPS reserve the right to extend the six (6) month deadline if approved by the Region 8 ESC Board of Directors. TIPS reserves all rights under the law to collect TIPS Administration Fees due to TIPS pursuant to this Agreement.

12. **Term of the Agreement.** If awarded, the resulting Agreement with TIPS is for approximately two years with an option for renewal for an additional two consecutive one-year terms. The first renewal year shall be automatic unless Vendor notifies TIPS of its objection to the first one-year renewal. The second one-year renewal shall only be effective if offered by TIPS at its sole discretion. If TIPS offers the second renewal option, the Vendor will be notified via email issued to Vendor's then-listed Primary Contact. The renewal option shall be deemed accepted by Vendor unless Vendor notifies TIPS of its objection to the renewal option in writing and confirms receipt by TIPS.

Actual Effective Date: Agreement is effective upon signature by authorized representatives of both Parties. The Effective Date does not affect the "Term Calculation Start Date."

Term Calculation Start Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, Vendor shall calculate the foregoing term as starting on the last day of the month that "Award Notifications" are anticipated as published in the Solicitation, regardless of the actual Effective Date.

Example of Term Calculation Start Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 in this example.

Contract Expiration Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, the term expiration date shall be two-years from the Term Calculation Start Date.

Example of Contract Expiration Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023 and the Contract Expiration Date of the resulting initial "two-year" term, (which is subject to an extension(s)) will be May 31, 2025 in this example.

Option(s) for Renewal: Any option(s) for renewal shall begin on the Contract Expiration Date, or the date of the expiration of the prior renewal term where applicable, and continue for the duration specified for the renewal option herein.

Example of Option(s) for Renewal: In this example, if TIPS offers the second one-year renewal, and the Contract Expiration Date following the first automatic renewal is May 31, 2026, then the one-year renewal is effective from May 31, 2026 to May 31, 2027.

TIPS may offer to extend Vendor Agreements to the fullest extent the TIPS Solicitation resulting in this Agreement permits.

13. **TIPS Pricing.** Vendor agrees and understands that for each TIPS Contract that it is awarded, Vendor submitted, agreed to, and received TIPS' approval for pricing, coefficients, mark-ups, discounts, and other pricing terms and incentives which make up Vendor's TIPS Pricing for that TIPS Contract ("TIPS Pricing"). Vendor confirms that Vendor will not add the TIPS Administration Fee as a charge or line-item in a TIPS Sale. Vendor hereby certifies that Vendor shall only offer goods and services through this TIPS Contract if those goods and services fall within the scope of the TIPS Contract and are priced according to Vendor's TIPS Pricing. TIPS reserves the right to review Vendor's proposals and quotes line-item by line-item to determine compliance. However, Vendor contractually agrees that all TIPS quotes and proposals shall be within the original terms of the Vendor's TIPS Pricing (scope, coefficients, percentage markups, and other pricing terms and incentives originally proposed by Vendor) such that TIPS may approve Vendor's quotes and proposals without additional vetting at TIPS discretion.

14. **Indemnification of TIPS.** **VENDOR AGREES TO INDEMNIFY, HOLD HARMLESS, AND DEFEND TIPS, TIPS MEMBERS, TIPS OFFICERS, TIPS EMPLOYEES, TIPS DIRECTORS, AND TIPS TRUSTEES (THE "TIPS INDEMNITEES") FROM AND AGAINST ALL**

CLAIMS AND SUITS BY THIRD-PARTIES FOR DAMAGES, INJURIES TO PERSONS (INCLUDING DEATH), PROPERTY DAMAGES, LOSSES, EXPENSES, FEES, INCLUDING COURT COSTS, ATTORNEY'S FEES, AND EXPERT FEES, ARISING OUT OF OR RELATING TO VENDOR'S PERFORMANCE UNDER THIS AGREEMENT (INCLUDING THE PERFORMANCE OF VENDOR'S OFFICERS, EMPLOYEES, AGENTS, AUTHORIZED RESELLERS, SUBCONTRACTORS, LICENSEES, OR INVITEES), REGARDLESS OF THE NATURE OF THE CAUSE OF ACTION, INCLUDING WITHOUT LIMITATION CAUSES OF ACTION BASED UPON COMMON, CONSTITUTIONAL, OR STATUTORY LAW OR BASED IN WHOLE OR IN PART UPON ALLEGATIONS OF NEGLIGENT OR INTENTIONAL ACTS OR OMISSIONS ON THE PART OF VENDOR, ITS OFFICERS, EMPLOYEES, AGENTS, AUTHORIZED RESELLERS, SUBCONTRACTORS, LICENSEES, OR INVITEES. NO LIMITATION OF LIABILITY FOR DAMAGES FOR PERSONAL INJURY OR PROPERTY DAMAGE ARE PERMITTED OR AGREED TO BY TIPS. APART FROM THIS INDEMNIFICATION PROVISION REQUIRING INDEMNIFICATION OF THE TIPS INDEMNITEES' ATTORNEY'S FEES AS SET FORTH ABOVE, RECOVERY OF ATTORNEYS' FEES BY THE PREVAILING PARTY IS AUTHORIZED ONLY IF AUTHORIZED BY TEX. EDUC. CODE § 44.032(F).

15. **Indemnification and Assumption of Risk – Vendor Data.** **VENDOR AGREES THAT IT IS VOLUNTARILY PROVIDING DATA (INCLUDING BUT NOT LIMITED TO: VENDOR INFORMATION, VENDOR DOCUMENTATION, VENDOR'S PROPOSALS, VENDOR PRICING SUBMITTED OR PROVIDED TO TIPS, TIPS CONTRACT DOCUMENTS, TIPS CORRESPONDENCE, VENDOR LOGOS AND IMAGES, VENDOR'S CONTACT INFORMATION, VENDOR'S BROCHURES AND COMMERCIAL INFORMATION, VENDOR'S FINANCIAL INFORMATION, VENDOR'S CERTIFICATIONS, AND ANY OTHER VENDOR INFORMATION OR DOCUMENTATION, INCLUDING WITHOUT LIMITATION SOFTWARE AND SOURCE CODE UTILIZED BY VENDOR, SUBMITTED TO TIPS BY VENDOR AND ITS AGENTS) ("VENDOR DATA") TO TIPS. FOR THE SAKE OF CLARITY, AND WITHOUT LIMITING THE BREADTH OF THE INDEMNITY OBLIGATIONS IN SECTION 14 ABOVE, VENDOR AGREES TO PROTECT, INDEMNIFY, AND HOLD THE TIPS INDEMNITEES HARMLESS FROM AND AGAINST ANY AND ALL LOSSES, CLAIMS, ACTIONS, DEMANDS, ALLEGATIONS, SUITS, JUDGMENTS, COSTS, EXPENSES, FEES, INCLUDING COURT COSTS, ATTORNEY'S FEES, AND EXPERT FEES AND ALL OTHER LIABILITY OF ANY NATURE WHATSOEVER ARISING OUT OF OR RELATING TO: (I) ANY UNAUTHORIZED, NEGLIGENT OR WRONGFUL USE OF, OR CYBER DATA BREACH INCIDENT AND VIRUSES OR OTHER CORRUPTING AGENTS INVOLVING, VENDOR'S DATA, PRICING, AND INFORMATION, COMPUTERS, OR OTHER HARDWARE OR SOFTWARE SYSTEMS, AND; (II) ALLEGATIONS OR CLAIMS THAT ANY VENDOR DATA INFRINGES ON THE INTELLECTUAL PROPERTY RIGHTS OF A THIRD-PARTY OR VENDOR.**

16. **Intellectual Property Indemnification by Vendor. Procedures Related to Indemnification.** In the event that an indemnity obligation arises, Vendor shall pay all amounts set forth in Section 14 and 15 above (including any settlements) and – if it has accepted its indemnity obligation without qualification – control the legal defense to such claim or cause of action, including without limitation attorney selection, strategy, discovery, trial, appeal, and settlement, and TIPS shall, at Vendor's cost and expense (with respect to reasonable out of pocket costs and expenses incurred by TIPS which shall be reimbursed to TIPS by Vendor), provide all commercially reasonable assistance requested by Vendor. In controlling any defense, Vendor shall ensure that all assertions of governmental immunity and all applicable pleas and defenses shall be promptly asserted.

17. **Indemnity for Underlying Sales and Supplemental Agreements.** Vendor shall be solely responsible for any customer claims or any disputes arising out of TIPS Sales or any Supplemental Agreement as if sold in the open-market. The Parties agree that TIPS shall not be liable for any claims arising out of Vendor's TIPS Sales or Supplemental Agreements, including but not limited to: allegations of product defect or insufficiency, allegations of service defect or insufficiency, allegations regarding delivery defect or insufficiency, allegations of fraud or misrepresentation, allegations regarding pricing or amounts owed for TIPS sales, and/or allegations regarding payment, over-payment, under-payment, or non-payment for TIPS Sales. Payment/Drafting, overpayment/over-drafting, under-payment/under-drafting, or non-payment for TIPS Sales between customer and Vendor and inspections, rejections, or acceptance of such purchases shall be the exclusive respective obligations of Vendor/Customer, and disputes shall be handled in accordance with the terms of the underlying Supplemental Agreement(s) entered into between Vendor and Customer. Vendor acknowledges that TIPS is not a dealer, subcontractor, agent, or reseller of Vendor's goods and services and shall not be responsible for any claims arising out of alleged insufficiencies or defects in Vendor's goods and services, should any arise.

18. **Confidentiality of Vendor Data.** Vendor understands and agrees that by signing this Agreement, all Vendor Data is hereby released to TIPS, TIPS Members, and TIPS third-party administrators to effectuate Vendor's TIPS Contract except as provided for herein. The Parties agree that Vendor Data is accessible by all TIPS Members as if submitted directly to that TIPS Member Customer for purchase consideration. If Vendor otherwise considers any portion of Vendor's Data to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code (the "Public Information Act") or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form which is required to be submitted as part of Vendor's proposal resulting in this Agreement and incorporated by reference. The Confidentiality Claim Form included in Vendor's proposal and incorporated herein by reference is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a Public Information Request. If TIPS receives a request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor Data deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required

by law, including Attorney General determination and opinion. In the event that TIPS receives a written request for information pursuant to the Public Information Act that affects Vendor's interest in any information or data furnished to TIPS by Vendor, and TIPS requests an opinion from the Attorney General, Vendor may, at its own option and expense, prepare comments and submit information directly to the Attorney General stating why the requested information is exempt from disclosure pursuant to the requirements of the Public Information Act. Vendor is solely responsible for submitting the memorandum brief and information to the Attorney General within the time period prescribed by the Public Information Act. Notwithstanding any other information provided in this solicitation or Vendor designation of certain Vendor Data as confidential or proprietary, Vendor's acceptance of this TIPS Vendor Agreement constitutes Vendor's consent to the disclosure of Vendor's Data, including any information deemed confidential or proprietary, to TIPS Members or as ordered by a Court or government agency, including without limitation the Texas Attorney General. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation by TIPS Members or as required by law.

19. **Vendor's Subcontractors.** TIPS recognizes that many vendors operate in the open market through the use of subcontractors. For that reason, TIPS permits Vendor to utilize subcontractors as authorized and permitted by the TIPS Member Customer. However, all purchase documents must include: (1) Vendor's Name, as known to TIPS, and; (2) Vendor's TIPS Contract Name and Number under which it is making the TIPS Sale. Vendor must report the sale pursuant to the terms herein and Vendor agrees that it is legally responsible for all reporting and fee payment as described herein for TIPS Sales even when subcontractors are utilized. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member to Vendor. The Parties intend that Vendor shall be responsible and for actions of subcontractors during a TIPS Sale. Vendor agrees that it is voluntarily authorizing subcontractors and in doing so, Vendor agrees that it is doing so at its own risk and agrees to protect, indemnify, and hold TIPS harmless in accordance with Sections 14-17 above related to subcontractor TIPS Sales made pursuant to this Agreement or purporting to be made pursuant to this Agreement that may be asserted against Vendor whether rightfully brought or otherwise. The Parties further agree that it is no defense to Vendor's breach of this Agreement that a subcontractor caused Vendor of breach this Agreement.

20. **Circumvention of TIPS Sales**. When a public entity initiates a purchase with Vendor, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Any request for quote, customer communication, or customer purchase initiated through or referencing a TIPS Contract shall be completed through TIPS pursuant to this Agreement. Any encouragement or participation by Vendor in circumventing a TIPS sale being completed may result in immediate termination of Vendor's TIPS Contract(s) for cause as well as preclusion from future TIPS opportunities at TIPS sole discretion.

21. **State of Texas Franchise Tax.** By signature hereon, Vendor hereby certifies that Vendor is not currently delinquent in the payment of any franchise taxes owed to the State of Texas under Chapter 171 of the Texas Tax Code.

22. **Termination.**

A) Termination for Convenience. TIPS may, by written notice to Vendor, terminate this Agreement for convenience, in whole or in part, at any time by giving thirty (30) days' written notice to Vendor of such termination, and specifying the effective date thereof.

B) Termination for Cause. If Vendor fails to materially perform pursuant to the terms of this Agreement, TIPS shall provide written notice to Vendor specifying the default. If Vendor does not cure such default within thirty (30) days, TIPS may terminate this Agreement, in whole or in part, for cause. If TIPS terminates this Agreement for cause, and it is later determined that the termination for cause was wrongful, the termination shall automatically be converted to and treated as a termination for convenience.

C) Vendor's Termination. If TIPS fails to materially perform pursuant to the terms of this Agreement, Vendor shall provide written notice to TIPS specifying the default ("Notice of Default"). If TIPS does not cure such default within thirty (30) days, Vendor may terminate this Agreement, in whole or in part, for cause. If Vendor terminates this Agreement for cause, and it is later determined that the termination for cause was wrongful, the termination shall automatically be converted to and treated as a termination for convenience.

D) Upon termination, all TIPS Sale orders previously accepted by Vendor shall be fulfilled and Vendor shall be paid for all TIPS Sales executed pursuant to the applicable terms. All TIPS Sale orders presented to Vendor but not fulfilled by Vendor, prior to the actual termination of this agreement shall be honored at the option of the TIPS Member. TIPS shall submit to Vendor an invoice for any outstanding TIPS Administration Fees and

approved expenses and Vendor shall pay such fees and expenses within 30 calendar days of receipt of such valid TIPS invoice. Vendor acknowledges and agrees that continued participation in TIPS is subject to TIPS' sole discretion and that any Vendor may be removed from the TIPS program at any time with or without cause. This termination clause does not affect TIPS Sales Supplemental Agreements pursuant to this term regarding termination and the Survival Clause term.

E) Vendor hereby waives any and all claims for damages, including, but not limited, to consequential damages or lost profits, that might arise from TIPS' act of terminating this Agreement.

23. **Survival Clause.** It is the intent of the Parties that this Agreement and procurement method applies to any TIPS Sale made during the life of this Agreement even if made on or near the Contract Expiration Date as defined herein. Thus, all TIPS Sales, including but not limited to: leases, service agreements, license agreements, open purchase orders, warranties, and contracts, even if they extend months or years past the TIPS Contract Expiration Date, shall survive the expiration or termination of this Agreement subject to the terms and conditions of the Supplemental Agreement between Customer and Vendor or unless otherwise specified herein.

24. **Audit Rights.** Due to transparency statutes and public accountability requirements of TIPS and TIPS Members, Vendor shall at their sole expense, maintain documentation of all TIPS Sales for a period of three years from the time of the TIPS Sale. In order to ensure and confirm compliance with this agreement, TIPS shall have authority to conduct audits of Vendor's TIPS Pricing or TIPS Sales with thirty-days' notice unless the audit is ordered by a Court Order or by a Government Agency with authority to do so without said notice. Notwithstanding the foregoing, in the event that TIPS is made aware of any pricing being offered to eligible entities that is materially inconsistent with Vendor's TIPS Pricing, TIPS shall have the ability to conduct the audit internally or may engage a third- party auditing firm to investigate any possible non-compliant conduct or may terminate the Agreement according to the terms of this Agreement. In the event of an audit, the requested materials shall be reasonably provided in the time, format, and at the location acceptable to TIPS. TIPS agrees not to perform a random audit the TIPS transaction documentation more than once per calendar year, but reserves the right to audit for just cause or as required by any governmental agency or court with regulatory authority over TIPS or the TIPS Member. These audit rights shall survive termination of this Agreement for a period of one (1) year from the effective date of termination.

25. **Conflicts of Interest.** The Parties confirm that they have not offered, given, or accepted, nor intend to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, service to the other in connection with this Agreement. Vendor affirms that, to the best of Vendor's knowledge, this Agreement has been arrived at independently, and is awarded without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this Agreement. Vendor agrees that it has disclosed any necessary affiliations with Region 8 Education Service Center and the TIPS Department, if any, through the Conflict of Interest attachment provided in the solicitation resulting in this Agreement.

26. **Volume of TIPS Sales.** Nothing in this Agreement or any TIPS communication may be construed as a guarantee that TIPS or TIPS Members will submit any TIPS orders to Vendor at any time.

27. **Compliance with the Law.** The Parties agree to comply fully with all applicable federal, state, and local statutes, ordinances, rules, and regulations applicable to their entity in connection with the programs contemplated under this Agreement.

28. **Severability.** If any term(s) or provision(s) of this Agreement are held by a court of competent jurisdiction to be invalid, void, or unenforceable, then such term(s) or provision(s) shall be deemed restated to reflect the original intention of the Parties as nearly as possible in accordance with applicable law and the remainder of this Agreement, and the remainder of the provisions of this Agreement shall remain in full force and effect and shall in no way be affected, impaired or invalidated, unless such holding causes the obligations of the Parties hereto to be impossible to perform or shall render the terms of this Agreement to be inconsistent with the intent of the Parties hereto.

29. **Force Majeure.** If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement through no fault of its own then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon. Upon delivering such notice, the obligation of the affected party, so far as it is affected by such Force Majeure as described, shall be suspended during the continuance of the inability then claimed but for no longer period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch. In the event that Vendor's obligations are suspended by reason of Force Majeure, all TIPS Sales accepted prior to the Force Majeure event shall be the legal responsibility of Vendor and the terms of the TIPS Sale Supplemental Agreement shall control Vendor's failure to fulfill for a Force Majeure event.

30. **Immunity.** Vendor agrees that nothing in this Agreement shall be construed as a waiver of sovereign or government immunity; nor constitute or be construed as a waiver of any of the privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department. The failure to enforce, or any delay in the enforcement of, any privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department under this Agreement or under applicable law shall not constitute a waiver of such privileges, rights, defenses, remedies, or immunities or be considered as a basis for estoppel.

31. **Insurance Requirements.** Vendor agrees to maintain the following minimum insurance requirements for the duration of this Agreement. All policies held by Vendor to adhere to this term shall be written by a carrier with a financial size category of VII and at least a rating of "A-" by A.M. Best Key Rating Guide. The coverages and limits are to be considered minimum requirements and in no way limit the liability of the Vendor(s). Any immunity available to TIPS or TIPS Members shall not be used as a defense by the contractor's insurance policy. Only deductibles applicable to property damage are acceptable, unless proof of retention funds to cover said deductibles is provided. "Claims made" policies will not be accepted. Vendor's required minimum coverage shall not be suspended, voided, cancelled, non-renewed or reduced in coverage or in limits unless replaced by a policy that provides the minimum required coverage except after thirty (30) days prior written notice by certified mail, return receipt requested has been given to TIPS or the TIPS Member if a project or pending delivery of an order is ongoing. Upon request, certified copies of all insurance policies shall be furnished to the TIPS or the TIPS Member. Vendor agrees that when Vendor or its subcontractors are liable for any damages or claims, Vendor's policy, shall be primary over any other valid and collectible insurance carried by the Member or TIPS.

General Liability:	$1,000,000 each Occurrence/Aggregate
Automobile Liability:	$300,000 Includes owned, hired & non-owned
Workers' Compensation:	Statutory limits for the jurisdiction in which the Vendor performs under this Agreement. If Vendor performs in multiple jurisdictions, Vendor shall maintain the statutory limits for the jurisdiction with the greatest dollar policy limit requirement.
Umbrella Liability:	$1,000,000 each Occurrence/Aggregate

32. **Waiver.** No waiver of any single breach or multiple breaches of any provision of this Agreement shall be construed to be a waiver of any breach of any other provision. No delay in acting regarding any breach of any provision shall be construed to be a waiver of such breach.

33. **Binding Agreement.** This Agreement shall be binding and inure to the benefit of the Parties hereto and their respective heirs, legal successors, and assigns.

34. **Headings.** The paragraph headings contained in this Agreement are included solely for convenience of reference and shall not in any way affect the meaning or interpretation of any of the provisions of this Agreement.

35. **Choice of Law and Venue.** This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of Texas. Any proceeding, claim, action, or alternative dispute resolution arising out of or relating to this Agreement or involving TIPS shall be brought in a State Court of competent jurisdiction in Camp County, Texas, or if Federal Court is legally required, a Federal Court of competent jurisdiction in the Eastern District of Texas, and each of the Parties irrevocably submits to the exclusive jurisdiction of said court in any such proceeding, waives any objection it may now or hereafter have to venue or to convenience of forum, agrees that all claims in respect of the proceeding shall be heard and determined only in any such court, and agrees not to bring any proceeding arising out of or relating to this procurement process or any contract resulting from or and contemplated transaction in any other court. The Parties agree that either or both of them may file a copy of this paragraph with any court as written evidence of the knowing, voluntary and freely bargained for agreement between the Parties irrevocably to waive any objections to venue or to convenience of forum.

36. **Relationship of the Parties.** Nothing contained in this Agreement shall be construed to make one Party an agent of the other Party nor shall either party have any authority to bind the other in any respect, unless expressly authorized by the other party in writing. The Parties are independent contractors and nothing in this Agreement creates a relationship of employment, trust, agency or partnership between them.

37. **Assignment.** No assignment of this Agreement or of any duty or obligation of performance hereunder, shall be made in whole or in part by a Party hereto without the prior written consent of the other Party. Written consent of TIPS shall not be unreasonably withheld.

38. **Minimum Condition and Warranty Requirements for TIPS Sales.** All goods quoted or sold through a TIPS Sale shall be new unless clearly stated otherwise in writing. All new goods and services shall include the applicable manufacturers minimum standard warranty unless otherwise agreed to in the Supplemental Agreement.

39. **Minimum Customer Support Requirements for TIPS Sales.** Vendor shall provide timely and commercially reasonable support for TIPS Sales or as agreed to in the applicable Supplemental Agreement.

40. **Minimum Shipping Requirements for TIPS Sales.** Vendor shall ship, deliver, or provide ordered goods and services within a commercially reasonable time after acceptance of the order. If a delay in delivery is anticipated, Vendor shall notify the TIPS Member as to why delivery is delayed and provide an updated estimated time for completion. The TIPS Member may cancel the order if the delay is not commercially acceptable or not consistent with the Supplemental Agreement applicable to the order.

41. **Minimum Vendor License Requirements.** Vendor shall maintain, in current status, all federal, state, and local licenses, bonds and permits required for the operation of the business conducted by Vendor. Vendor shall remain fully informed of and in compliance with all ordinances and regulations pertaining to the lawful provision of goods or services under the TIPS Agreement. TIPS and TIPS Members reserve the right to stop work and/or cancel a TIPS Sale or terminate this or any TIPS Sale Supplemental Agreement involving Vendor if Vendor's license(s) required to perform under this Agreement or under the specific TIPS Sale have expired, lapsed, are suspended or terminated subject to a 30-day cure period unless prohibited by applicable statue or regulation.

42. **Minimum Vendor Legal Requirements.** Vendor shall remain aware of and comply with this Agreement and all local, state, and federal laws governing the sale of products/services offered by Vendor under this contract. Such applicable laws, ordinances, and policies must be complied with even if not specified herein.

43. **Minimum Site Requirements for TIPS Sales (*when applicable to TIPS Sale*).**

Cleanup: When performing work on site at a TIPS Member's property, Vendor shall clean up and remove all debris and rubbish resulting from their work as required or directed by the TIPS Member or as agreed by the parties. Upon completion of work, the premises shall be left in good repair and an orderly, neat, clean and unobstructed condition.

Preparation: Vendor shall not begin a project for which a TIPS Member has not prepared the site, unless Vendor does the preparation work at no cost, or until TIPS Member includes the cost of site preparation in the TIPS Sale Site preparation includes, but is not limited to: moving furniture, installing wiring for networks or power, and similar pre-installation requirements.

Registered Sex Offender Restrictions: For work to be performed at schools, Vendor agrees that no employee of Vendor or a subcontractor who has been adjudicated to be a registered sex offender will perform work at any time when students are, or reasonably expected to be, present unless otherwise agreed by the TIPS Member. Vendor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the TIPS Sale at the TIPS Member's discretion. Vendor must identify any additional costs associated with compliance of this term. If no costs are specified, compliance with this term will be provided at no additional charge.

Safety Measures: Vendor shall take all reasonable precautions for the safety of employees on the worksite, and shall erect and properly maintain all necessary safeguards for protection of workers and the public. Vendor shall post warning signs against all hazards created by the operation and work in progress. Proper precautions shall be taken pursuant to state law and standard practices to protect workers, general public and existing structures from injury or damage.

Smoking: Persons working under Agreement shall adhere to the TIPS Member's or local smoking statutes, codes, ordinances, and policies.

44. **Wage Rates:** TIPS Member Customers often have to designate either Davis Bacon Act wage rates or similar wage rates for their construction contracts. The RS Means Unit Price Book accounts for local wage rates and the contractor must comply with RS Means and any additional wage rate requirements of the TIPS Member Customer.

45. **Engineering and Architectural Services:** It is impermissible in Texas and some other jurisdictions for engineering and architectural services (A&E) to be procured or provided through an interlocal cooperative contract such as this one. The TIPS Member Customer, if required by law, must engage independent A&E providers according to the laws of their jurisdiction.

46. **Payment for TIPS Sales.** TIPS Members may make payments for TIPS Sales directly to Vendor, or as otherwise agreed to in the applicable Supplemental Agreement after receipt of the invoice and in compliance with applicable payment statutes. Regardless of how payment is issued or received for a TIPS Sale, Vendor is responsible for all reporting and TIPS Administration Fee payment requirements as stated herein.

47. **Marketing.** Vendor agrees that any logos, images, photos, writing, audio, clip art, music, data, promotional documents, or any other information or intellectual property ("Vendor Property") approved or provided by Vendor for TIPS' use are either the exclusive property of Vendor, or Vendor has all necessary rights, license, and permissions to allow TIPS use of Vendor Property. Vendor permits TIPS to use their name and logo to identify Vendor as a TIPS Awarded Vendor on the TIPS website only. All other use of Vendor's Property by TIPS shall require prior written Vendor approval. Any Vendor use of TIPS' logos, images, photos, writing, audio, clip art, music, data, promotional documents, or any other information or intellectual property ("TIPS Property") or reference to TIPS in marketing outreach requires Vendor to obtain prior written authorization from marketing@tips-usa.com which will not be unreasonably withheld. Vendor must execute a TIPS Marketing Waiver before specific, written authorization will be granted. For any marketing outreach taken by Vendor without proper TIPS' authorization and execution of the TIPS Marketing Waiver, **Vendor shall indemnify and hold harmless TIPS and its employees, officers, agents, representatives, contractors, assignees, designees, and TIPS Members from any and all claims, damages, and judgments involving:**
    i. **Infringement of patent, copyright, trade secrets, trade or services marks, and any other intellectual or intangible property rights and/or claims arising from the Vendor's (including Vendor's officers', employees', agents', authorized resellers', subcontractors', or invitees') unauthorized use or distribution of Vendor Property.**
    ii. **Violations of privacy and data laws; and**
    iii. **Unauthorized use or distribution of TIPS Property.**

48. **Tax Exempt Status of TIPS Members.** Most TIPS Members are tax exempt entities and the laws and regulations applicable to the specific TIPS Member customer shall control.

49. **Automatic Renewal Limitation for TIPS Sales.** No TIPS Sale may incorporate an automatic renewal clause that exceeds month to month terms with which the TIPS Member must comply. All renewal terms incorporated into a TIPS Sale Supplemental Agreement shall only be valid and enforceable when Vendor received written confirmation of acceptance of the renewal term from the TIPS Member for the specific renewal term. The purpose of this clause is to avoid a TIPS Member inadvertently renewing an Agreement during a period in which the governing body of the TIPS Member has not properly appropriated and budgeted the funds to satisfy the Agreement renewal. Any TIPS Sale Supplemental Agreement containing an "Automatic Renewal" clause that conflicts with these terms is rendered void and unenforceable.

50. **Choice of Law Limitation for TIPS Sales.** Vendor agrees that if any "Choice of Law" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Choice of Law" applicable to the TIPS Sale agreement/contract between Vendor and TIPS Member shall be the state where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Choice of Law" clause that conflicts with these terms is rendered void and unenforceable.

51. **Venue Limitation for TIPS Sales.** Vendor agrees that if any "Venue" provision is included in any TIPS Sale Agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Venue" for any litigation or alternative dispute resolution shall be in the state and county where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Venue" clause that conflicts with these terms is rendered void and unenforceable.

52. **Indemnity Limitation for TIPS Sales.** Texas and other jurisdictions restrict the ability of governmental entities to indemnify others. Vendor agrees that if any "Indemnity" provision which requires the TIPS Member to indemnify Vendor is included in any TIPS sales agreement/contract between Vendor and a TIPS Member, that clause must either be stricken or qualified by including that such indemnity is only permitted, "to the extent permitted by the laws and constitution of [TIPS Member's State]" unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing an "Indemnity" clause that conflicts with these terms is rendered void and unenforceable.

53. **Arbitration Limitation for TIPS Sales.** Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause may not require that the arbitration is mandatory or binding. Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause provides for only voluntary and non-binding arbitration unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Arbitration" clause that conflicts with these terms is rendered void and unenforceable.

In Witness Whereof, the parties hereto, each acting under due and proper authority, have signed this Agreement.

TIPS VENDOR AGREEMENT SIGNATURE FORM

TIPS 250502 Elevators and Servicing (Part 2)

Vendor Name: United Elevator Services, LLC

Vendor Address: PO Box 1308

City: Knoxville State: TN Zip Code: 37901

Vendor Authorized Signatory Name: Shawn Lyness

Vendor Authorized Signatory Title: Sales Manager

Vendor Authorized Signatory Phone: 865-223-3909

Vendor Authorized Signatory Email: shawnl@unitedelevator.com

Vendor Authorized Signature: Shawn Lyness Date: 6-13-2025

(The following is for TIPS completion only)

TIPS Authorized Signatory Name: Dr. Fitts

TIPS Authorized Signatory Title: Executive Director

TIPS Authorized Signature: David Wayne Fitts Date: 07/21/2025



250502
United Elevator Services
Supplier Response

Event Information

Number: 250502
Title: Elevators and Servicing (2 PART with JOC)
Type: Request for Proposal
Issue Date: 5/1/2025
Deadline: 6/20/2025 03:00 PM (CT)
Notes: This is a solicitation issued by The Interlocal Purchasing System (TIPS), a department of Texas Region 8 Education Service Center. It is an Indefinite Delivery, Indefinite Quantity ("IDIQ") solicitation. It will result in contracts that provide, through adoption/"piggyback" an indefinite quantity of supplies/services, during a fixed period of time, to TIPS public entity and qualifying non-profit "TIPS Members" throughout the nation. Thus, there is no specific project or scope of work to review. Rather this solicitation is issued as a prospective award for utilization when any TIPS Member needs the goods or services offered during the life of the agreement.

This is a two part solicitation. Part 1 is solicited for TIPS sales that are not considered a "public work" construction project. Part 1 permits the sale of goods and non-construction/non-"public work" services such as maintenance and minor repairs. Part 2 Job Order Contract (JOC) is solicited for projects considered by your TIPS Member Customers to be a "public work" construction project. The determination of whether or not a TIPS sale amounts to a "public work" construction project requiring a Part 2 JOC contract is made by the TIPS Member Customer at the time of each TIPS sale. Thus, Vendors are encouraged to respond to both Parts 1 and 2 in case your TIPS Member Customers require that a sale be made under one Part or the other. However, responding to both Parts is not required.

IF YOU CURRENTLY HOLD TIPS CONTRACT 220502 ELEVATORS PART 1, PART 2, OR BOTH ("220502"), YOU MUST RESPOND TO THIS SOLICITATION TO PREVENT LAPSE OF CONTRACT UNLESS YOU HOLD ANOTHER CURRENT TIPS CONTRACT THAT COVERS ALL OF YOUR ELEVATOR OFFERINGS. THIS AWARDED CONTRACT WILL REPLACE YOUR EXPIRING TIPS CONTRACT 220502. IF YOU HOLD ANOTHER TIPS CONTRACT OTHER THAN 220502 WHICH COVERS ALL OF YOUR ELEVATOR OFFERINGS AND YOU ARE SATISFIED WITH IT, THERE IS NO NEED TO RESPOND TO THIS SOLICITATION UNLESS YOU PREFER TO HOLD BOTH CONTRACTS.

Contact Information

Address: Region 8 Education Service Center
4845 US Highway 271 North
Pittsburg, TX 75686
Phone: +1 (866) 839-8477
Email: bids@tips-usa.com

United Elevator Services Information

Address: 4835 Airport Highway
Knoxville, TN 37920
Phone: (865) 573-0731
Toll Free: (800) 338-0064
Web Address: unitedelevator.com

By submitting your response, you certify that you are authorized to represent and bind your company.

Shawn Lyness
Signature

shawnl@unitedelevator.com
Email

Submitted at 6/18/2025 02:32:51 PM (CT)

Supplier Note

Please contact me directly if you have any questions. Shawn Lyness 865-223-3909

Requested Attachments

Vendor Agreement (Part 1)

250502 Vendor Agreement (Part 1).pdf

If responding to Part 1, the Vendor Agreement must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, Vendor Name placed in the line provided at the top, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 1), Vendor may assert so in the Attribute Questions and those shall be addressed during evaluation.

Vendor Agreement Signature Form (Part 1)

250502 Vendor Agreement Signature Form (Part 1) SIGNED.pdf

If responding to Part 1 the Vendor Agreement Signature Form (Part 1) must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 1), Vendor may leave the signature line of this page blank and assert so in the Attribute Questions and those shall be addressed during evaluation.

Pricing Form 1 (Part 1)

250502 Pricing Form 1 (Part 1) FILLED OUT.xlsx

If responding to Part 1, Pricing Form 1 (Part 1) must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed as instructed, and uploaded to this location.

Pricing Form 2 (Part 1)

Copy of 250502 Pricing Form 2 (Part 1) FILLED OUT.xlsx

If responding to Part 1, Pricing Form 2 (Part 1) must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed as instructed, and uploaded to this location.

Required Confidentiality Claim Form

250502 Required Confidentiality Claim Form SIGNED.pdf

The Required Confidentiality Claim Form must be downloaded from the “Attachments” section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. This is the only way for Vendor to assert confidentiality of any information submitted.

(3) Required Customer Reference Letters

TIPS Ref Letter.pdf

Whether responding to Part 1, Part 2, or both. Vendor is required to upload three Customer Reference Letters from three separate customers as described herein. Vendor will be scored on the aggregate Reference Letters received from customers as described in the solicitation. Vendor must provide three current letters (issued within the 12 months preceding the date on which the solicitation was posted) from its customers verifying Vendor's customer service and reputation as described herein. (Ex. if the solicitation/bid posted on February 4, 2024, the letters must be dated on or after February 1, 2023). The letters must be issued from customers who have received goods or services from the Vendor or its current corporate officials, on entity/company letterhead, must specify its customer experience with Vendor, and must be signed by an authorized representative of the customer. TIPS Reference Forms from past bids will no longer be accepted.

Alternate or Supplemental Pricing Documents (Part 1)

No response

Optional. If responding to Part 1, when completing Pricing Form 1 (Part 1) & Pricing Form 2 (Part 1), you direct TIPS to view additional, alternate, or supplemental pricing documentation, you may upload that Part 1 documentation.

Current Form W-9

2025 W-9.pdf

Vendor must upload their current IRS Tax Form W-9. The legal name, EIN, and d/b/a's listed should match the information provided herein exactly. This form will be utilized by TIPS to properly identify your entity.

Vendor Agreement (Part 2)

250502 Vendor Agreement (Part 2).pdf

If responding to Part 2, the Vendor Agreement (Part 2) must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 2), Vendor may assert so in the Attribute Questions and those shall be addressed during evaluation.

Vendor Agreement Signature Form (Part 2)

250502 Vendor Agreement Signature Form (Part 2) SIGNED.pdf

If responding to Part 2, the Vendor Agreement Signature Form (Part 2) must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement (Part 2), Vendor may leave the signature line of this page blank and assert so in the Attribute Questions and those shall be addressed during evaluation.

Part 2 Required Bonding Capacity Letter

2025 0616 United Elevator Ref Ltr.pdf

If proposing on Part 2, Vendor is required to upload a Bonding Capacity Letter from its surety, as described herein, at this location. Please see the attachment entitled "Instructions and Sample - Part 2 Required Bonding Capacity Letter" for complete instructions. . On Part 2, Vendor will be scored on the aggregate bonding capacity displayed in the accepted letter. Vendor must provide a current letter (issued on or after the first day of the month preceding the date on which the solicitation was posted) from its surety verifying Vendor's bonding capacity as described herein. (Ex. if the solicitation/bid posted on February 4, 2022, the letter must be dated on or after January 1 2022. The letter must be issued from Vendor's Surety companies, on surety company letterhead, must specify the maximum bonding capacity of the Vendor, and must be signed by an authorized representative of the surety company. The issuing surety must be authorized to do business in the State of Texas and must be listed on the Department of the Treasury's Listing of Approved Sureties (Department Circular 570).

Supplemental Vendor Information (Supplemental Vendor Information Only)

No response

Optional. If Vendor would like to display or include any brochures, promotional documents, marketing materials, or other Vendor Information for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Certificates & Licenses (Supplemental Vendor Information Only)

No response

Optional. If Vendor would like to display any applicable certificates or licenses (including HUB certificates) for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor's Warranties, Terms, and Conditions (Supplemental Vendor Information Only) *No response*

Optional. If Vendor would like to display any standard warranties, terms, or conditions which are often applicable to their offerings for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor Logo (Supplemental Vendor Information Only) 2009 logo.bmp

Optional. If Vendor desires that their logo be displayed on their public TIPS profile for TIPS and TIPS Member viewing, Vendor may upload that logo at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Disclosure of Lobbying Activities - Standard Form - LLL *No response*

Do not upload this form unless Vendor has reportable lobbying activities. There are Attributes entitled, "2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Disclosure of Lobbying Activities – Standard Form - LLL must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location.

Conflict of Interest Questionnaire - Form CIQ *No response*

Do not upload this form unless you have a reportable conflict with TIPS. There is an Attribute entitled "Conflict of Interest Questionnaire Requirement" immediately followed by an Attribute entitled "Conflict of Interest Questionnaire Requirement – Form CIQ – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Conflict of Interest Questionnaire – Form CIQ must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded at this location.

Bid Attributes

1	**Disadvantaged/Minority/Women Business & Federal HUBZone** Some participating public entities are required to seek Disadvantaged/Minority/Women Business & Federal HUBZone ("D/M/WBE/Federal HUBZone") vendors. Does Vendor certify that their entity is a D/M/WBE/Federal HUBZone vendor? If you respond "Yes," you must upload current certification proof in the appropriate "Response Attachments" location. NO
2	**Historically Underutilized Business (HUB)** Some participating public entities are required to seek Historically Underutilized Business (HUB) vendors as defined by the Texas Comptroller of Public Accounts Statewide HUB Program. Does Vendor certify that their entity is a HUB vendor? If you respond "Yes," you must upload current certification proof in the appropriate "Response Attachments" location. No
3	**National Coverage** Can the Vendor provide its proposed goods and services to all 50 US States? No

4 States Served

If Vendor answered "No" to the question entitled "National Coverage," please list all states where vendor can provide the goods and services proposed directly below. Your response may dictate which potential TIPS Member customers consider purchasing your offerings.

Entire state of Tennessee with select coverage areas in Kentucky, Virginia, West Virginia, North Carolina, South Carolina, Georgia, Alabama, and Mississippi.

5 Description of Vendor Entity and Vendor's Goods & Services

If awarded, this description of Vendor and Vendor's goods and services will appear on the TIPS website for customer/public viewing.

In business since 1958, United Elevator Services, LLC is an independent family owned, non-union, full-service company. We offer new installations, preventative maintenance control plans, modernizations, and repairs on elevators and accessibility equipment (residential and commercial).

6 Primary Contact Name

Please identify the individual who will be primarily responsible for all TIPS matters and inquiries for the duration of the contract.

Shawn Lyness

7 Primary Contact Title

Primary Contact Title

Sales Manager

8 Primary Contact Email

Please enter a valid email address that will definitely reach the Primary Contact.

shawnl@unitedelevator.com

9 Primary Contact Phone

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

Please provide the accurate and current phone number where the individual who will be primarily responsible for all TIPS matters and inquiries for the duration of the contract can be reached directly.

8655730731

10 Primary Contact Fax

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

11 Primary Contact Mobile

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652233909

12 Secondary Contact Name

Please identify the individual who will be secondarily responsible for all TIPS matters and inquiries for the duration of the contract.

Taylor Sawyer

13 **Secondary Contact Title**

Secondary Contact Title

Executive

14 **Secondary Contact Email**

Please enter a valid email address that will definitely reach the Secondary Contact.

taylors@unitedelevator.com

15 **Secondary Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

Please provide the accurate and current phone number where the individual who will be secondarily responsible for all TIPS matters and inquiries for the duration of the contract can be reached directly.

8655730731

16 **Secondary Contact Fax**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

17 **Secondary Contact Mobile**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652097775

18 **Administration Fee Contact Name**

Please identify the individual who will be responsible for all payment, accounting, and other matters related to Vendor's TIPS Administration Fee due to TIPS for the duration of the contract.

Shawn Lyness

19 **Administration Fee Contact Email**

Please enter a valid email address that will definitely reach the Administration Fee Contact.

shawnl@unitedelevator.com

20 **Administration Fee Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652233909

21 **Purchase Order and Sales Contact Name**

Please identify the individual who will be responsible for receiving and processing purchase orders and sales under the TIPS Contract.

Shawn Lyness

22 **Purchase Order and Sales Contact Email**

Please enter a valid email address that will definitely reach the Purchase Order and Sales Contact.

shawnl@unitedelevator.com

23 **Purchase Order and Sales Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

8652233909

24 **Company Website**

Company Website (Format - www.company.com)

unitedelevator.com

25 **Entity D/B/A's and Assumed Names**

You must confirm that you are responding to this solicitation under your legal entity name. Go now to your Supplier Profile in this eBid System and confirm that your profile reflects your "Legal Name" as it is listed on your W9.

In this question, please identify all of your entity's assumed names and D/B/A's. Please note that you will be identified publicly by the Legal Name under which you respond to this solicitation unless you organize otherwise with TIPS after award.

No response

26 **Primary Address**

Primary Address

4835 Airport Highway

27 **Primary Address City**

Primary Address City

Knoxville

28 **Primary Address State**

Primary Address State (2 Digit Abbreviation)

TN

29 **Primary Address Zip**

Primary Address Zip

37920

30 **Search Words Identifying Vendor**

Please list all search words and phrases to be included in the TIPS database related to your entity. ***Do not*** list words which are not associated with the bid category/scope (See bid title for general scope). This will help users find you through the TIPS website search function. You may include product names, manufacturers, specialized services, and other words associated with the scope of this solicitation.

Elevator, Elevators, Elevator Maintenance, Elevator Service, Elevator Repair, Elevator Installation, Elevator Upgrade, Elevator Modernization, Accessibility Lift, Accessibility Lifts, Accessibility Lift Maintenance, Accessibility Lift Service, Accessibility Lift Repair, Accessibility Lift Installation, New Construction, Modernization

31 **Certification of Vendor Residency (Required by the State of Texas)**

Does Vendor's parent company or majority owner:

(A) have its principal place of business in Texas; ***or*** (B) employ at least 500 persons in Texas?

Texas Education Code Section 44.031 requires that this information be considered in evaluation for certain contracts. However, Vendor response does not affect points, scoring, or potential award.

No

32 **Vendor's Principal Place of Business (City)**

In what city is Vendor's principal place of business located?

Knoxville, Tennessee

33 **Vendor's Principal Place of Business (State)**

In what state is Vendor's principal place of business located?

Tennessee

34 **Vendor's Years in Business**

How many years has the business submitting this proposal been operating in its current capacity and field of work?

67

35 **Certification Regarding Entire TIPS Agreement for Part 1 and Part 2 Contracts**

This is a two part solicitation. Part 1 is solicited for TIPS sales that are not considered a "public work" construction project. Part 1 permits the sale of goods and non-construction/non-"public work" services such as maintenance and minor repairs. Part 2 Job Order Contract (JOC) is solicited for projects considered by your TIPS Member Customers to be a "public work" construction project. The determination of whether or not a TIPS sale amounts to a "public work" construction project requiring a Part 2 JOC contract is made by the TIPS Member Customer at the time of each TIPS sale. Thus, Vendors are encouraged to respond to both Parts 1 and 2 in case your TIPS Member Customers require that a sale be made under one Part or the other. However, responding to both Parts is not required. If Vendor responds and is awarded to both Parts, Vendor will have one contract for Part 1 and a separate contract for Part 2.

Vendor agrees that, if awarded, Vendor's final TIPS Contract(s), for either Part 1, Part 2, or both Parts, will consist of the provisions set forth in the corresponding finalized TIPS Vendor Agreement, Vendor's responses to these attribute questions, and: (1) The TIPS solicitation document resulting in the Agreement; (2) Any addenda or clarifications issued in relation to the corresponding TIPS solicitation; (3) All solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor’s entire proposal response to the corresponding TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, accepted pricing, accepted responses to questions, and accepted written clarifications of Vendor’s proposal, and; any properly included attachments to the TIPS Contract.

Does Vendor agree?

Yes, Vendor agrees

36 **Minimum Percentage Discount Offered to TIPS Members on all Part 1 Goods and Services (READ CAREFULLY)**

Please read thoroughly and carefully as an error on your response can render your Part 1 contract award unusable. If you are not proposing on Part 1, you must still respond to proceed but it will not apply to you unless you decide to propose and are awarded on Part 1.

TIPS Members often turn to TIPS Contracts for ease of use and to receive discounted pricing.

If awarded on Part 1, what is the minimum percentage discount that you can offer TIPS Members off of all Part 1 goods and service pricing (whether offered through Pricing Form 1, Pricing Form 2, or in another accepted format) that you offer? Only limited goods/services specifically identified and excluded from this discount in Vendor's original proposal may be excluded from this discount.

Vendor must respond with a percentage from 0%-100%. The percentage discount that you input below will be applied to your Part 1 "Catalog Pricing", as defined in the solicitation, for all TIPS Sales made during the life of the contract. You cannot alter this percentage discount once the solicitation legally closes. You will always be required to discount every TIPS Sale by the percentage included below with the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal. If you add goods or services to your "Catalog Pricing" during the life of the contract, you will be required to sell those new items with this discount applied.

Example: In this example, you enter a 10% minimum percentage discount below. In year-one of your TIPS Contract, your published Part 1 "Catalog Pricing" (website/store/published pricing) for "Material A" is $100 and for "Material A Maintenance Service" is $100. In this example, you must sell those items under the Part 1 TIPS Contract at the proposed 10% discounted price of: "Material A" - $90, "Material A Maintenance Service" - $90. In year two of your TIPS Contract, you update your Part 1 "Catalog Pricing" with the market. You add "Material B" to your "Catalog Pricing" for $200 and have increased the price of "Material A" to $110 and the price of "Material A Maintenance Service" to $110. In this example, after the Part 1 "Catalog Pricing" update, you must still sell those items under the Part 1 TIPS Contract at the proposed 10% discounted price of: "Material A" - $99, "Material A Maintenance Service" - $99, and "Material B" - $180.00.

With the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal, if you cannot honor the discount on all Part 1 goods and items now included or which may be added in the future with certainty, then you should offer a lesser discount percentage below.

If awarded on Part 1, what is the minimum percentage discount that you can offer TIPS Members off of all Part 1 goods and service pricing (whether offered through Pricing Form 1, Pricing Form 2, or in another accepted format) that you offer?

0%

37 **Honoring Vendor's Part 1 Minimum Percentage Discount**

Vendor is asked in these Attribute Questions to provide a Minimum Percentage Discount offered to TIPS Members on all Part 1 goods and services sold under the TIPS Contract. If proposing on Part 1, points will be assigned for your response and scoring of your Part 1 proposal will be affected. On your Part 1 evaluation, a "YES" answer will be awarded the maximum 10 points and a "NO" answer will be awarded 0 points. If you are not proposing on Part 1, you must still answer to proceed but this term will not apply to you or affect your scoring unless you decide to propose and are awarded on Part 1.

If awarded on Part 1, does Vendor agree to honor the Minimum Percentage Discount off of their TIPS "Catalog Pricing" that Vendor proposed for all TIPS Sales made for the duration of the TIPS Contract?

Yes, Vendor agrees

38 **Volume and Additional Discounts**

In addition to the Part 1 Minimum Percentage Discount proposed herein, does Vendor ever expect and intend to offer additional, greater, or volume discounts to TIPS Members?

If proposing on Part 1, point(s) may be assigned for your response in the Part 1 category of "Pricing" during scoring and evaluation. If you are not proposing on Part 1, you must respond to proceed but no points will be assigned for your response.

Yes

39 **Part 1 "Catalog Pricing" and Pricing Requirements**

This is a requirement of the Part 1 TIPS Contract and is non-negotiable. If you are not proposing on Part 1, you must still agree to proceed but it will not apply to you unless you decide to propose and are awarded on Part 1.

In this solicitation and resulting contract, Part 1 "Catalog Pricing" shall be defined as:

"The then available list of goods or services, in the most current listing regardless of date, that takes the form of a catalog, price list, price schedule, shelf-price or other viewable format that:

A. is regularly maintained by the manufacturer or Vendor of an item; and

B. is either published or otherwise available for review by TIPS or a customer during the purchase process;

C. to which the Minimum Percentage Discount proposed by the proposing Vendor may be applied.

If awarded on Part 1 of this TIPS Contract, for the duration of the contract, Vendor agrees to provide, upon request, their then current "Catalog Pricing." Or, in limited circumstances where Vendor has proposed the Percentage Mark-Up method of pricing in this proposal, proof of Vendor's "cost" may be accepted by TIPS in place of catalog pricing.

YES

40 **REQUIRED FOR PART 2 - Vendor's Regular Hours RS Means Coefficient**

What is Vendor's Regular Hours RS Means Coefficient? **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

The RS Means Price Book is a unit price book adjusted for different geographic areas by using the City Cost Index for each location. You may visit https://www.rsmeans.com for more information.

You must review the TIPS Part 2 RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab prior to responding herein.

To propose the RS Means Price Book pricing exactly, Vendor would insert a 1.0 as their Regular Hours RS Means Coefficient below, to propose a 5% discount off of the RS Means Price Book Vendor would insert a .95 as their Regular Hours RS Means Coefficient below. To see the full scoring rubric and use TIPS scoring calculator, please view the TIPS RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab.

Insert Vendor's Regular Hours RS Means Coefficient below. **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

1.05

41 **REQUIRED FOR PART 2 - Vendor's After-Hours RS Means Coefficient**

What is Vendor's After-Hours RS Means Coefficient? **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

The RS Means Price Book is a unit price book adjusted for different geographic areas by using the City Cost Index for each location. You may visit https://www.rsmeans.com for more information.

You must review the TIPS Part 2 RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab prior to responding herein.

The most common After-Hours RS Means Coefficient is "time-and-a-half" of the standard RS Means Unit Price Book. For example, if Vendor's Regular Hours Coefficient above is .95, Vendor would assert an After-Hours RS Means Coefficient of 1.45 for "time-and-a-half" pricing. To see the full scoring rubric and use TIPS scoring calculator, please view the TIPS RS Means JOC Pricing Explanation & Rubric under the "Attachments" tab.

Insert Vendor's After-Hours RS Means Coefficient below. **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

1.55

42 **REQUIRED FOR PART 2 - Vendor's Percentage Markup of Items not Pre-Priced within the RS Means Price Book**

Here, Vendor must enter a percentage, not a coefficient. **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

If Vendor sells items which cannot be found in the RS Means Price Book, at what Percentage Markup does Vendor agree to sell those Non Pre-Priced items? This is a maximum Percentage Markup and Vendor may always offer customers a lesser markup.

Example: In this example, Vendor is selling a project to a TIPS Member school district and some of the contract pricing for special materials cannot be verified because it cannot be found in the RS Means Price book. Vendor may sell those specialty items to the Member this percentage markup from cost. In this example, if one of the specialty items cost Vendor $100 from the manufacturer and Vendor proposed a Percentage Markup of 30% here, then Vendor could sell the item to the TIPS Customer for $130.00 or less in this example.

Vendor must provide TIPS with manufacturer documentation reflecting the cost of any non pre-priced item at the time of the TIPS sale so that TIPS can verify that the proposed percentage markup is being honored.

What is Vendor's Percentage Markup of items not Pre-Priced within the RS Means Price Book? **If you do not intend to propose on Part 2, you may enter a "0" in order to continue.**

35%

43

REQUIRED FOR PART 2 - TIPS Pricing and Line Item Estimate Pricing Requirements

This is a requirement of the Part 2 TIPS Contract and is non-negotiable. If you are not proposing on Part 2, you must still agree to proceed but it will not apply to you unless you decide to propose and are awarded on Part 2.

Vendor must respond to the required pricing attributes above seeking RS Means coefficients and a percentage markup if seeking to propose on Part 2.

If awarded on Part 2 of this TIPS Contract, for the duration of the contract, Vendor agrees to provide a RS Means line-item estimate to TIPS for each anticipated Part 2 TIPS project or sale. Or, in limited circumstances in contracts where Xactimate pricing is also expressly permitted and Vendor also submits Xactimate pricing under Part 2, Vendor may instead provide an Xactimate line-item estimate to TIPS. However, Vendor agrees that when a TIPS Member Customer seeks a quote for a Part 2 TIPS sale, Vendor will always supply a line-item estimate to TIPS for review and approval.

Yes, Vendor agrees

44

EXCEPTIONS & DEVIATIONS TO TIPS STANDARD TERMS AND CONDITIONS

Vendor agrees that, if awarded, Vendor's final TIPS Part 1 and/or Part 2 Contract will consist of the provisions set forth in the finalized TIPS Vendor Agreement, Vendor's responses to these attribute questions, and: (1) The corresponding TIPS solicitation document resulting in this Agreement; (2) Any addenda or clarifications issued in relation to the corresponding TIPS solicitation; (3) All solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor’s entire proposal response to the corresponding TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, accepted pricing, accepted responses to questions, and accepted written clarifications of Vendor’s proposal, and; any properly included attachments to the TIPS Contract. In the event of conflict between the terms of the finalized Vendor Agreement and one of the incorporated documents the terms and conditions which are in the best interest of governmental/qualifying non-profit TIPS Members shall control at TIPS sole discretion.

If Vendor responds, "No, Vendor does not agree" to this Attribute, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration. This is the only proper way to submit proposed deviations for TIPS consideration. TIPS reserves the right to accept, decline, or modify Vendor's requested negotiated terms. For this reason, answering "No, Vendor does not agree" may ultimately delay or prevent award.

Does Vendor agree with TIPS standard terms and conditions as presented in the TIPS solicitation document (RFP, RCSP, RFQ, or other) and the TIPS Vendor Agreement document?

Yes, Vendor agrees

45	**TIPS Sales Reporting Requirements** **This is a requirement of the TIPS Contract and is non-negotiable.** By submitting this proposal, Vendor certifies that Vendor will properly report all TIPS sales. With the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the purchase order or similar purchase document (with Vendor's Name, as known to TIPS, and the TIPS Contract Name and Number included) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion.
46	**TIPS Administration Fee Requirement and Acknowledgment** **This is a requirement of the TIPS Contract and is non-negotiable.** The collection of fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The TIPS Administration Fee is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of each TIPS Sale legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published in the corresponding RFP or RCSP document. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. By submitting a proposal, Vendor agrees that it has read, understands, and agrees to the published TIPS Administration Fee amount, calculation, and payment requirements. By submitting a proposal Vendor further confirms that all TIPS Pricing includes the TIPS Administration Fee and Vendor will not show adding the TIPS Administration Fee as a charge or line-item in any TIPS Sale.
47	**TIPS Member Access to Vendor Proposal & Documentation** **This is a requirement of the TIPS Contract and is non-negotiable.** Notwithstanding any other information provided in this solicitation or Vendor designation of certain documentation as confidential or proprietary, Vendor's submission of this proposal constitutes Vendor's express consent to the disclosure of Vendor's comprehensive proposal, including any information deemed confidential or proprietary, **to TIPS Members**. The proposing Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation to TIPS Members or by TIPS Members. By submitting this proposal, Vendor certifies the foregoing.

48	**Non-Collusive Bidding Certificate** **This is a requirement of the TIPS Contract and is non-negotiable.** By submission of this proposal, the Vendor certifies that: 1) This proposal has been independently arrived at without collusion with any other entity, bidder, or with any competitor; 2) This proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other bidder, competitor or potential competitor: 3) No attempt has been or will be made to induce any other person, partnership or corporation to modify, submit, or not to submit a bid or proposal; and 4) The person signing this bid or proposal certifies that they are duly authorized to execute this proposal/contract on behalf of Vendor and they have fully informed themselves regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the bidder as well as to the person signing in its behalf;
49	**Antitrust Certification Statements (Tex. Government Code § 2155.005)** **This is a requirement of the TIPS Contract and is non-negotiable.** By submission of this bid or proposal, Vendor certifies under penalty of perjury of the laws of the State of Texas that: (1) I am duly authorized to execute this proposal/contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Vendor) identified herein; (2) In connection with this proposal, neither I nor any representative of Vendor has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15; (3) In connection with this proposal, neither I nor any representative of the Vendor has violated any federal antitrust law; (4) Neither I nor any representative of Vendor has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.
50	**Limitation on Out-of-State Litigation - Texas Business and Commerce Code § 272** **This is a requirement of the TIPS Contract and is non-negotiable.** Texas Business and Commerce Code § 272 prohibits a construction contract, or an agreement collateral to or affecting the construction contract, from containing a provision making the contract or agreement, or any conflict arising under the contract or agreement, subject to another state's law, litigation in the courts of another state, or arbitration in another state. If included in Texas construction contracts, such provisions are voidable by a party obligated by the contract or agreement to perform the work. By submission of this proposal, Vendor acknowledges this law and ***if Vendor enters into a construction contract with a Texas TIPS Member*** under this procurement, Vendor certifies compliance.

51 **Required Confidentiality Claim Form**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS provides the required TIPS Confidentiality Claim Form in the "Attachments" section of this solicitation. Vendor must execute this form by either signing and waiving any confidentiality claim, or designating portions of Vendor's proposal confidential. If Vendor considers any portion of Vendor's proposal to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form.
If TIPS receives a public information act or similar request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor documents deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law, including Attorney General determination and opinion.

Notwithstanding any other Vendor designation of Vendor's proposal as confidential or proprietary, Vendor's submission of this proposal constitutes Vendor's agreement that proper execution of the required TIPS Confidentiality Claim Form is the only way to assert any portion of Vendor's proposal as confidential.

52 **Non-Discrimination Statement and Certification**

This is a requirement of the TIPS Contract and is non-negotiable.

In accordance with Federal civil rights law, all U.S. Departments, including but not limited to the USDA, USDE, FEMA, are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by federal funds (not all bases apply to all programs).
Vendor certifies that Vendor will comply with applicable Non-Discrimination and Equal Opportunity provisions set forth in TIPS Member Customers' policies and other regulations at the local, state, and federal levels of governments.

☑ Yes, I certify

53 **Limitation of Vendor Indemnification and Similar Clauses**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS, a department of Region 8 Education Service Center, a political subdivision, and local government entity of the State of Texas, is prohibited from indemnifying third-parties (pursuant to the Article 3, Section 52 of the Texas Constitution) except as otherwise specifically provided for by law or as ordered by a court of competent jurisdiction. Article 3, Section 52 of the Texas Constitution states that "no debt shall be created by or on behalf of the State … " and the Texas Attorney General has opined that a contractually imposed obligation of indemnity creates a "debt" in the constitutional sense. Tex. Att'y Gen. Op. No. MW-475 (1982). Thus, contract clauses which require TIPS to indemnify Vendor, pay liquidated damages, pay attorney's fees, waive Vendor's liability, or waive any applicable statute of limitations must be deleted or qualified with ''to the extent permitted by the Constitution and Laws of the State of Texas."

Does Vendor agree?

☑ Yes, I Agree

54 **Alternative Dispute Resolution Limitations**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS, a department of Region 8 Education Service Center, a political subdivision, and local government entity of the State of Texas, does not agree to binding arbitration as a remedy to dispute and no such provision shall be permitted in this Agreement with TIPS. Vendor agrees that any claim arising out of or related to this Agreement, except those specifically and expressly waived or negotiated within this Agreement, may be subject to non-binding mediation at the request of either party to be conducted by a mutually agreed upon mediator as prerequisite to the filing of any lawsuit arising out of or related to this Agreement. Mediation shall be held in either Camp or Titus County, Texas. Agreements reached in mediation will be subject to the approval by the Region 8 ESC's Board of Directors, authorized signature of the Parties if approved by the Board of Directors, and, once approved by the Board of Directors and properly signed, shall thereafter be enforceable as provided by the laws of the State of Texas.

Does Vendor agree?

Yes, Vendor agrees

55 **No Waiver of TIPS Immunity**

This is a requirement of the TIPS Contract and is non-negotiable.

Vendor agrees that nothing in this Agreement shall be construed as a waiver of sovereign or government immunity; nor constitute or be construed as a waiver of any of the privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department. The failure to enforce, or any delay in the enforcement, of any privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department under this Agreement or under applicable law shall not constitute a waiver of such privileges, rights, defenses, remedies, or immunities or be considered as a basis for estoppel.

Does Vendor agree?

☑ Yes, Vendor agrees

56 **Payment Terms and Funding Out Clause**

This is a requirement of the TIPS Contract and is non-negotiable.

Vendor agrees that TIPS and TIPS Members shall not be liable for interest or late-payment fees on past-due balances at a rate higher than permitted by the laws or regulations of the jurisdiction of the TIPS Member.

Funding-Out Clause: Vendor agrees to abide by the applicable laws and regulations, including but not limited to Texas Local Government Code § 271.903, or any other statutory or regulatory limitation of the jurisdiction of any TIPS Member, which requires that contracts approved by TIPS or a TIPS Member are subject to the budgeting and appropriation of currently available funds by the entity or its governing body.

Does Vendor agree?

☑ Yes, Vendor agrees

57 **Certification Regarding Prohibition of Certain Terrorist Organizations (Tex. Gov. Code 2270)**

Vendor certifies that Vendor is not a company identified on the Texas Comptroller's list of companies known to have contracts with, or provide supplies or services to, a foreign organization designated as a Foreign Terrorist Organization by the U.S. Secretary of State.

Does Vendor certify?

Yes, Vendor certifies

58 **Certification Regarding Prohibition of Boycotting Israel (Tex. Gov. Code 2271)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has ten (10) or more full-time employees; and (c) this Agreement or any agreement with a TIPS Member under this procurement has value of $100,000 or more, the following certification shall apply; otherwise, this certification is not required. Vendor certifies, where applicable, that neither the Vendor, nor any affiliate, subsidiary, or parent company of Vendor, if any, boycotts Israel, and Vendor agrees that Vendor and Vendor Companies will not boycott Israel during the term of this Agreement. For purposes of this Agreement, the term "boycott" shall mean and include refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory but does not include an action made for ordinary business purposes.

When applicable, does Vendor certify?

Yes, Vendor certifies

59 **Certification Regarding Prohibition of Contracts with Certain Foreign-Owned Companies (Tex. Gov. Code 2274)**

Certain public entities are prohibited from entering into a contract or other agreement relating to critical infrastructure that would grant Vendor direct or remote access to or control of critical infrastructure in this state, excluding access specifically allowed by a customer for product warranty and support purposes.

Vendor certifies that neither it nor its parent company nor any affiliate of Vendor or its parent company, is (1) owned by or the majority of stock or other ownership interest of the company is held or controlled by individuals who are citizens of China, Iran, North Korea, Russia, or a designated country; (2) a company or other entity, including governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, Russia, or a designated country; or (3) headquartered in China, Iran, North Korea, Russia, or a designated country.

For purposes of this certification, "critical infrastructure" means "a communication infrastructure system, cybersecurity system, electric grid, hazardous waste treatment system, or water treatment facility." Vendor certifies that Vendor will not grant direct or remote access to or control of critical infrastructure, except for product warranty and support purposes, to prohibited individuals, companies, or entities, including governmental entities, owned, controlled, or headquartered in China, Iran, North Korea, Russia, or a designated country, as determined by the Governor.

When applicable, does Vendor certify?

Yes, Vendor certifies

60 **Certification Regarding Prohibition of Discrimination Against Firearm and Ammunition Industries (Tex. Gov. Code 2274)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has at least ten (10) full-time employees; and (c) this Agreement or any Supplemental Agreement with certain public entities have a value of at least $100,000 that is paid wholly or partly from public funds; (d) the Agreement is not excepted under Tex. Gov. Code 2274 and (e) the purchasing public entity has determined that Vendor is not a sole-source provider or the purchasing public entity has not received any bids from a company that is able to provide this written verification, the following certification shall apply; otherwise, this certification is not required.

Vendor certifies that Vendor, or association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary parent company, or affiliate of these entities or associations, that exists to make a profit, does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and will not discriminate during the term of this contract against a firearm entity or firearm trade association.

For purposes of this Agreement, “discriminate against a firearm entity or firearm trade association” shall mean, with respect to the entity or association, to: “(1) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; (2) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or (3) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.”

“Discrimination against a firearm entity or firearm trade association” does not include: “(1) the established policies of a merchant, retail seller, or platform that restrict or prohibit the listing or selling of ammunition, firearms, or firearm accessories; and (2) a company’s refusal to engage in the trade of any goods or services, decision to refrain from continuing an existing business relationship, or decision to terminate an existing business relationship to comply with federal, state, or local law, policy, or regulations or a directive by a regulatory agency, or for any traditional business reason that is specific to the customer or potential customer and not based solely on an entity’s or association’s status as a firearm entity or firearm trade association.”

When applicable, does Vendor certify?

Yes, Vendor certifies

61 **Certification Regarding Termination of Contract for Non-Compliance (Tex. Gov. Code 552.374)**

If Vendor is not a governmental body and (a) this Agreement or any Supplemental Agreement with a public entity has a stated expenditure of at least $1 million in public funds for the purchase of goods or services by certain public entities; or (b) this Agreement or any Supplemental Agreement results in the expenditure of at least $1 million in public funds for the purchase of goods or services by certain public entities in their fiscal year, the following certification shall apply; otherwise, this certification is not required.

As required by Tex. Gov. Code 552.374, the following statement is included in the RFP and the Agreement (unless the Agreement is (1) related to the purchase or underwriting of a public security; (2) is or may be used as collateral on a loan; or (3) proceeds from which are used to pay debt service of a public security of loan): “The requirements of Subchapter J, Chapter 552, Government Code, may apply to this solicitation and Agreement and the Vendor agrees that this Agreement and any applicable Supplemental Agreement can be terminated if Vendor knowingly or intentionally fails to comply with a requirement of that subchapter.”

Pursuant to Chapter 552 of the Texas Government Code, Vendor certifies that Vendor shall: (1) preserve all contracting information related to this Agreement as provided by the records retention requirements applicable to TIPS or the purchasing TIPS Member for the duration of the Agreement; (2) promptly provide to TIPS or the purchasing TIPS Member any contracting information related to the Agreement that is in the custody or possession of Vendor on request of TIPS or the purchasing TIPS Member; and (3) on completion of the Agreement, either (a) provide at no cost to TIPS or the purchasing TIPS Member all contracting information related to the Agreement that is in the custody or possession of Vendor, or (b) preserve the contracting information related to the Agreement as provided by the records retention requirements applicable to TIPS or the purchasing TIPS Member.

When applicable, does Vendor certify?

Yes, Vendor certifies

62 **Certification Regarding Prohibition of Boycotting Certain Energy Companies (Tex. Gov. Code 2274)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has ten (10) or more full-time employees; and (c) this Agreement or any Supplemental Agreement with certain public entities has a value of $100,000 or more that is to be paid wholly or partly from public funds, the following certification shall apply; otherwise, this certification is not required.

Vendor certifies that Vendor, or any wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of these entities or business associations, if any, do not boycott energy companies and will not boycott energy companies during the term of the Agreement or any applicable Supplemental Agreement.

For purposes of this certification the term “company” shall mean an organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, that exists to make a profit.

The term “boycott energy company” shall mean “without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company (a) engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law, or (b) does business with a company described by paragraph (a).” (See Tex. Gov. Code 809.001).

When applicable, does Vendor certify?

Yes, Vendor certifies

63 **Felony Conviction Notice - Texas Education Code 44.034**

Texas Education Code, Section 44.034, Notification of Criminal History, Subsection (a), states, "a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.”

Subsection (b) states, "a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract.”

Subsection (c) states, "This section does not apply to a publicly held corporation.

Vendor certifies one of the following:

A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable, or;

B. My firm is not owned nor operated by anyone who has been convicted of a felony, or;

C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony.

If Vendor responds with Option (C), Vendor is required to provide information in the next attribute.

B. My firm is not owned nor operated by felon.

64 **Felony Conviction Notice - Texas Education Code 44.034 - Continued**

If Vendor selected Option (C) in the previous attribute, Vendor must provide the following information herein:

1. Name of Felon(s)

2. The Felon(s) title/role in Vendor's entity, and

3. Details of Felon(s) Conviction(s).

No response

65 **Conflict of Interest Questionnaire Requirement**

Vendor agrees that it has looked up, read, and understood the current version of Texas Local Government Code Chapter 176 which generally requires disclosures of conflicts of interests by Vendor hereunder if Vendor:

(1) has an employment or other business relationship with a local government officer of our local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of our local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of our local governmental entity.

(4) Any other financial, commercial, or familial relationship with our local government that may warrant reporting under this statute.

Does Vendor certify that it has NO reportable conflict of interest?

Yes, Vendor certifies - VENDOR HAS NO CONFLICT

66 **Conflict of Interest Questionnaire Requirement - Form CIQ - Continued**

If you responded "No, Vendor does not certify - VENDOR HAS CONFLICT" to the Conflict of Interest Questionnaire question above, you are required by law to fully execute and upload the form attachment entitled "Conflict of Interest Questionnaire - Form CIQ." If you accurately claimed no conflict above, you may disregard the form attachment entitled "Conflict of Interest Questionnaire - Form CIQ."
Have you uploaded this form if applicable?

Not Applicable

67 **Upload of Current W-9 Required**

Vendors are required by TIPS to upload a current, accurate W-9 Internal Revenue Service (IRS) Tax Form for your entity. This form will be utilized by TIPS to properly identify your entity.

You must confirm that you are responding to this solicitation under your legal entity name. Go now to your Supplier Profile in this eBid System and confirm that your profile reflects your "Legal Name" as it is listed on your W9.

68 **Regulatory Good Standing Certification**

Does Vendor certify that its entity is in good standing will all government entities and agencies, whether local, state, or federal, that regulate any aspect of Vendor's field of work or business operations?

If Vendor selects "No", Vendor must provide explanation on the following attribute question.

Yes, Vendor certifies

69	**Regulatory Good Standing Certification - Explanation - Continued** If Vendor responded to the prior attribute that "No", Vendor is not in good standing, Vendor must provide an explanation of that lack of good standing here for TIPS consideration. *No response*

70	**Instructions Only - Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion** **Instructions for Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion** 1. By answering yes to the next Attribute question below, the vendor and prospective lower tier participant is providing the certification set out herein in accordance with these instructions. 2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment. 3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances. 4. The terms “covered transaction,” “debarred,” “suspended,” “ineligible,” “lower tier covered transaction,” “participants,” “person,” “primary covered transaction,” “principal,” “proposal” and “voluntarily excluded,” as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations. 5. The prospective lower tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated. 6. The prospective lower tier participant further agrees by submitting this form that it will include this clause titled “Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transaction” without modification in all lower tier covered transactions and in all solicitations for lower tier covered transactions. 7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List. 8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings. 9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment.

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Suspension or Debarment Certification

Read the instructions in the attribute above and then answer the following accurately.

Vendor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

Does Vendor certify?

Yes, Vendor certifies

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Vendor Certification of Criminal History - Texas Education Code Chapter 22

Texas Education Code Chapter 22 requires entities that contract with school districts to provide services to obtain criminal history record information regarding covered employees. Contractors must certify to the district that they have complied. Covered employees with disqualifying criminal histories are prohibited from serving at a school district pursuant to this law.

DEFINITIONS

Covered employees: Employees of a contractor or subcontractor who have or will have continuing duties related to the service to be performed at the District and have or will have direct contact with students. The District will be the final arbiter of what constitutes direct contact with students.

Disqualifying criminal history: Any conviction or other criminal history information designated by the District, or one of the following offenses, if at the time of the offense, the victim was under 18 or enrolled in a public school: (a) a felony offense under Title 5, Texas Penal Code; (b) an offense for which a defendant is required to register as a sex offender under Chapter 62, Texas Code of Criminal Procedure; or (c) an equivalent offense under federal law or the laws of another state.

Vendor certifies:

NONE (Section A): None of the employees of Vendor and any subcontractors are covered employees, as defined above. If this box is checked, I further certify that Contractor has taken precautions or imposed conditions to ensure that the employees of Vendor and any subcontractor will not become covered employees. Contractor will maintain these precautions or conditions throughout the time the contracted services are provided under this procurement.

OR

SOME (Section B): Some or all of the employees of Vendor and any subcontractor are covered employees. If this box is checked, I further certify that: (1) Vendor has obtained all required criminal history record information regarding its covered employees. None of the covered employees has a disqualifying criminal history; (2) If Vendor receives information that a covered employee subsequently has a reported criminal history, Vendor will immediately remove the covered employee from contract duties and notify the purchasing entity in writing within 3 business days; (3) Upon request, Vendor will provide the purchasing entity with the name and any other requested information of covered employees so that the purchasing entity may obtain criminal history record information on the covered employees; (4) If the purchasing entity objects to the assignment of a covered employee on the basis of the covered employee's criminal history record information, Vendor agrees to discontinue using that covered employee to provide services at the purchasing entity.

Which option does Vendor certify?

Yes, I certify - NONE (Section A)

73 **Certification Regarding "Choice of Law" Terms with TIPS Members**

Vendor agrees that if any "Choice of Law" provision is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Choice of Law" applicable to the sales agreement/contract between Vendor and TIPS Member shall be the state where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Choice of Law" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

74 **Certification Regarding "Venue" Terms with TIPS Members**

Vendor agrees that if any "Venue" provision is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Venue" for any litigation or alternative dispute resolution is shall be in the state and county where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Venue" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

75 **Certification Regarding "Automatic Renewal" Terms with TIPS Members**

Vendor agrees that no TIPS Sale may incorporate an "Automatic Renewal" clause that exceeds month to month terms with which the TIPS Member must comply. All renewal terms incorporated into a TIPS Sale Supplemental Agreement shall only be valid and enforceable when Vendor received written confirmation of acceptance of the renewal term from the TIPS Member for the specific renewal term. The purpose of this clause is to avoid a TIPS Member inadvertently renewing a Supplemental Agreement during a period in which the governing body of the TIPS Member has not properly appropriated and budgeted the funds to satisfy the Agreement renewal. Any TIPS Sale Supplemental Agreement containing an "Automatic Renewal" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

76

Certification Regarding "Indemnity" Terms with TIPS Members

Texas and other jurisdictions restrict the ability of governmental entities to indemnify others. Vendor agrees that if any "Indemnity" provision which requires the TIPS Member to indemnify Vendor is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must either be stricken or qualified by including that such indemnity is only permitted, "to the extent permitted by the laws and constitution of [TIPS Member's State]" unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing an "Indemnity" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

77

Certification Regarding "Arbitration" Terms with TIPS Members

Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause may ***not*** require that the arbitration is mandatory or binding. Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause provides for only voluntary and non-binding arbitration unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a “Arbitration” clause that conflicts with these terms is rendered void and unenforceable.
If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

78

2 CFR PART 200 AND FEDERAL CONTRACT PROVISIONS EXPLANATION

TIPS and TIPS Members will sometimes seek to make purchases with federal funds. In accordance with 2 C.F.R. Part 200 of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (sometimes referred to as “EDGAR”),Vendor's response to the following questions labeled "2 CFR Part 200 or Federal Provision" will indicate Vendor's willingness and ability to comply with certain requirements which may be applicable to TIPS purchases paid for with federal funds, if accepted by Vendor.

Your responses to the following questions labeled "2 CFR Part 200 or Federal Provision" will dictate whether TIPS can list this awarded contract as viable to be considered for a federal fund purchase. **Failure to certify all requirements labeled "2 CFR Part 200 or Federal Provision" will mean that your contract is listed as not viable for the receipt of federal funds. However, it will not prevent award.**

If you do enter into a TIPS Sale when you are accepting federal funds, the contract between you and the TIPS Member will likely require these same certifications.

79	**2 CFR Part 200 or Federal Provision - Prohibition of Cost Plus** Contracts paid with federal funds which exceed the simplified acquisition threshold currently set at $250,000 (2 CFR 200.320), which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, may not utilize a cost plus percentage of cost and percentage of cost method of contract pricing. Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members for a TIPS Sale resulting from this procurement process which exceeds the simplified acquisition threshold, Vendor shall not utilize a cost plus a percentage of cost and percentage of cost method of contract pricing for that expenditure. If Vendor fails to certify and proposes a Cost Plus Markup Method of pricing anywhere in their proposal, Vendor will **not** be listed as federally/EDGAR compliant for TIPS purposes. Does Vendor certify? Yes, Vendor agrees.
80	**2 CFR Part 200 or Federal Provision - Vendor Willingness to Accept Federal Funds** This certification is not required by federal law. However, TIPS Members are public entities and qualifying non-profits which often receive federal funding and grants (ESSER, CARES Act, EDGAR, etc.) ***Accepting such funds often requires additional required certifications and responsibilities for Vendor.*** The following attribute questions include these required certifications. Your response to this questions, the following certifications, and other factors will determine whether your contract award will be deemed as eligible for federal fund expenditures by TIPS Members. If awarded, is Vendor willing to accept payment for goods and services offered under this contract paid for by a TIPS Member with federal funds? Yes
81	**2 CFR Part 200 or Federal Provision - Contracts** Contracts for more than the simplified acquisition threshold currently set at $250,000 (2 CFR § 200.320), which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate. Notice: Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserve all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party. Does vendor agree? Yes, Vendor agrees

82

2 CFR Part 200 or Federal Provision - Termination

Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of $10,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserve the right to terminate any agreement in excess of $10,000 resulting from this procurement process for cause after giving the vendor an appropriate opportunity and up to 30 days, to cure the causal breach of terms and conditions. ESC Region 8 and TIPS Members reserve the right to terminate any agreement in excess of $10,000 resulting from this procurement process for convenience with 30 days notice in writing to the awarded vendor. The Vendor would be compensated for work performed and goods procured as of the termination date if for convenience of the ESC Region 8 and TIPS Members. Any award under this procurement process is not exclusive and the ESC Region 8 and TIPS reserves the right to purchase goods and services from other vendors when it is in the best interest of the ESC Region 8 and TIPS.

Does vendor agree?

Yes, Vendor agrees

83

2 CFR Part 200 or Federal Provision - Clean Air Act

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of $150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
Pursuant to the Clean Air Act, et al above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members require that the proposer certify that during the term of an award by the ESC Region 8 and TIPS Members resulting from this procurement process the vendor agrees to comply with all of the above regulations, including all of the terms listed and referenced therein.
Does vendor agree?

Yes, Vendor agrees

84

2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment

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

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members require the proposer certify that during the term and during the life of any contract with ESC Region 8 and TIPS Members resulting from this procurement process the vendor certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352).

Does Vendor agree?

Yes, Vendor agrees

85

2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment - Continued

Applicable to Grants, Subgrants, Cooperative Agreements, and Contracts Exceeding $100,000 in Federal Funds

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

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

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

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, “disclosure Form to Report Lobbying,” in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all covered subawards exceeding $100,000 in Federal funds at all appropriate tiers and that all subrecipients shall certify and disclose accordingly.

Does Vendor certify that it has NOT lobbied as described herein?

Yes, Vendor certifies - NO Reportable Lobbying

86

2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment - Continued

If you answered "No, Vendor does not certify - Lobbying to Report" to the above attribute question, you must download, read, execute, and upload the attachment entitled "Disclosure of Lobbying Activities - Standard Form - LLL", as instructed, to report the lobbying activities you performed or paid others to perform.

87

2 CFR Part 200 or Federal Provision - Federal Rule

Compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15). (Contracts, subcontracts, and subgrants of amounts in excess of $100,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members requires the proposer certify that in performance of the contracts, subcontracts, and subgrants of amounts in excess of $250,000, the vendor will be in compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).

Does vendor certify compliance?

Yes, Vendor certifies

88

2 CFR Part 200 or Federal Provision - Procurement of Recovered Materials

A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include: (1) procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; (2) procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Does vendor certify that it is in compliance with these provisions?

Yes, Vendor certifies

89

2 CFR Part 200 or Federal Provision - Rights to Inventions

If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.
Pursuant to the above, when the foregoing applies to ESC Region 8 and TIPS Members, Vendor certifies that during the term of an award resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in the Federal rule above.
Does vendor certify?

Yes, Vendor certifies

90

2 CFR Part 200 or Federal Provision - Domestic Preferences for Procurements and Compliance with Buy America Provisions

As appropriate and to the extent consistent with law, TIPS Member Customers, to the greatest extent practicable under a Federal award, may provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). Vendor agrees that the requirements of this section will be included in all subawards including all contracts and purchase orders for work or products under this award, to the greatest extent practicable under a Federal award. For purposes of 2 CFR Part 200.322, “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stag through the application of coatings, occurred in the United States. Moreover, for purposes of 2 CFR Part 200.322, “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum, plastics and polymer-based products such as polyvinyl chloride pipe, aggregates such as concrete, glass, including optical fiber, and lumber.

Vendor certifies that it is in compliance with all applicable provisions of the Buy America Act. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition. For purposes of 2 CFR Part 200.322,

“Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

“Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that to the greatest extent practicable Vendor will provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

Does Vendor Certify?

Yes, Vendor certifies

91

2 CFR Part 200 or Federal Provision - Ban on Foreign Telecommunications

ESC 8 and TIPS Members are prohibited from obligating or expending Federal financial assistance, to include loan or grant funds, to: (1) procure or obtain, (2) extend or renew a contract to procure or obtain, or (3) enter into a contract (or extend or renew a contract) to procure or obtain, equipment, services, or systems that use “covered telecommunications” equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. “Covered telecommunications” equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities), and physical security surveillance of critical infrastructure and other national security purposes, and video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities) for the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes detailed in 2 CFR § 200.216.

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that Vendor will not purchase equipment, services, or systems that use “covered telecommunications”, as defined by 2 CFR §200.216 equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

Does vendor certify?

Yes, Vendor certifies

92

2 CFR Part 200 or Federal Provision - Contract Cost & Price

For contracts more than the simplified acquisition threshold currently set at $250,000, a TIPS Member may, in very rare circumstances, be required to negotiate profit as a separate element of the price pursuant to 2 C.F.R. 200.324(b). Under those circumstances, Vendor agrees to provide information and negotiate with the TIPS Member regarding profit as a separate element of the price. However, Vendor certifies that the total price charged by the Vendor shall not exceed the Vendor's TIPS pricing and pricing terms proposed.

Does Vendor certify?

Yes, Vendor certifies

93

2 CFR Part 200 or Federal Provision - Equal Employment Opportunity

Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members on any federally assisted construction contract, the equal

opportunity clause is incorporated by reference here.

Does Vendor Certify?

Yes, Vendor certifies

94

2 CFR Part 200 or Federal Provision - Davis Bacon Act Compliance

Texas Statute requires compliance with Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146- 3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non- Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

Pursuant to state and federal requirements, Vendor certifies that it will be in compliance with all applicable Davis-Bacon Act provisions if/when applicable.

Does Vendor certify?

Yes, Vendor certifies

95

2 CFR Part 200 or Federal Provision - Contract Work Hours and Safety Standards

Where applicable, all contracts awarded by ESC 8 and TIPS Members in excess of $100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.
Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that during the term of an award for all contracts resulting from this procurement process, Vendor will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act.

Does Vendor certify?

Yes, Vendor certifies

96

2 CFR Part 200 or Federal Provision - FEMA Fund Certification & Certification of Access to Records

If and when Vendor accepts a TIPS purchase paid for in full or part with FEMA funds, Vendor certifies that:

(1) Vendor agrees to provide the TIPS Member, the FEMA Administrator, the Comptroller General of the United States, or any of their authorized representatives access to and rights to reproduce any books, documents, papers, and records of the Contractor which are directly pertinent to this contract, or any contract resulting from this procurement, for the purposes of making audits, examinations, excerpts, and transcriptions. This right also includes timely and reasonable access to Vendor's personnel for the purpose of interview and discussion relating to such documents. Vendor agrees to provide the FEMA Administrator or an authorized representatives access to construction or other work sites pertaining to the work being completed under the contract. Vendor acknowledges and agrees that no language in this contract or the contract with the TIPS Member is intended to prohibit audits or internal reviews by the FEMA Administrator or the Comptroller General of the United States.

(2) The Vendor shall not use the Department of Homeland Security's seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre-approval.

(3) The Vendor will comply with all applicable Federal law, regulations, executive orders, FEMA policies, procedures, and directives.

(4) The Federal Government is not a party to this contract and is not subject to any obligations or liabilities to the non-Federal entity, contractor, or any other party pertaining to any matter resulting from the contract.

(5) The Vendor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the Vendor's actions pertaining to this contract.

Does Vendor certify?

Yes, Vendor certifies

97

2 CFR Part 200 or Federal Provision - Certification of Compliance with the Energy Policy and Conservation Act

When appropriate and to the extent consistent with the law, Vendor certifies that it will comply with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq; 49 C.F.R. Part 18) and any state mandatory standards and policies relating to energy efficiency which are contained in applicable state energy conservation plans issued in compliance with the Act.

Does Vendor certify?

Yes, Vendor certifies

98

2 CFR Part 200 or Federal Provision - Certification of Compliance with Never Contract with the Enemy

Where applicable, all contracts awarded by ESC 8 and TIPS Members in excess of $50,000.00, within the period of performance, and which are performed outside of the United States, including U.S. territories, are subject to the regulations implementing Never Contract with the Enemy in 2 CFR part 183. Per 2 CFR part 183, in the situation specified, ESC 8 and TIPS Members shall terminate any contract or agreement resulting from this procurement which violates the Never Contract with the Enemy regulation in 2 CFR part 183, including if Vendor is actively opposing the United States or coalition forces involved in a contingency operation in which members of the the Armed Forces are actively engaged in hostilities. Vendor certifies that it is neither an excluded entity under the System for Award Management (SAM) nor Federal Awardee Performance and Integrity Information System (FAPIIS) for any contract terminated due to Never Contract with the Enemy as a Termination for Material Failure to Comply.

Does Vendor certify?

Yes, Vendor certifies

99

2 CFR Part 200 or Federal Provision - Certification of Compliance with EPA Regulations

For contracts resulting from this procurement, in excess of $100,000.00 and paid for with federal funds, Vendor certifies that Vendor will comply with all applicable standards, orders, regulations, and/or requirements issued pursuant to the Clean Air Act of 1970, as amended (42 U.S.C. 1857(h)), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15.

Does Vendor certify?

Yes, Vendor certifies

100

2 CFR Part 200 or Federal Provision - Record Retention Requirements

For contracts resulting from this procurement, paid for by ESC 8 or TIPS Members with federal funds, Vendor certifies that Vendor will comply with the record retention requirements detailed in 2 CFR § 200.334. Vendor certifies that Vendor will retain all records as required by 2 CFR § 200.334 for a period of three years after final expenditure or financial reports, as applicable, and all other pending matters are closed.

Does Vendor certify?

Yes, Vendor certifies

101

2 CFR Part 200 or Federal Provision - Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms.

Do you ever anticipate the possibility of subcontracting any of your work under this award if you are successful?

If you respond "Yes", you must respond to the following attribute question accurately. If you respond "No", you may skip the following attribute question.

~~YES~~ Vendor corrected response to 'NO' via email on 06.25.25.

102	**2 CFR Part 200 or Federal Provision - If "Yes" Response to Above Attribute - Continued - Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms.** **Only respond to this question if you responded "Yes" to the attribute question directly above. Skip this question if you responded "No" to the attribute question directly above.** Does Vendor certify that it will follow the following affirmative steps? Federal Regulation 2 CFR §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms. (a)The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. (b) Affirmative steps must include: (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists; (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources; (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises; (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises; (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce ; and (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs(1) through (5) of this section. Does Vendor certify? *No response*
103	**ACKNOWLEDGMENT & BINDING CORPORATE AUTHORITY** By submitting this proposal, the individual(s) submitting on behalf of the Vendor certify that they are authorized by Vendor to complete and submit this proposal on behalf of Vendor and that this proposal was duly submitted on behalf of Vendor by authority of its governing body, if any, and within the scope of its corporate powers. Vendor further certifies that it has read, examined, and understands all portions of this solicitation including but not limited to all attribute questions, attachments, solicitation documents, bid notes, and the Vendor Agreement(s). Vendor certifies that, if necessary, Vendor has consulted with counsel in understanding all portions of this solicitation.

KCS | DR. JON RYSEWYK
Superintendent
KNOX COUNTY SCHOOLS

June 17, 2025

RE: Reference Letter for United Elevator

To whom it may concern:

Please accept this reference for United Elevator who provided goods and services to Knox County Schools. They have provided elevator services including installations, monthly maintenance, and compliance inspections for Knox County Schools in 2024-25 as well as several years prior. We understand they have submitted a proposal to Education Service Center Region 8 and TIPS Cooperative.

Knox County Schools has been a customer of United Elevator for several years, and they have always exceeded commitments and expectations. We plan to continue to partner with them and would highly recommend United Elevator to TIPS public entity and non-profit members.

Thank you,

Lori Hall, Operations Supervisor
Knox County Schools
Maintenance & Operations Department
900 E. Fifth Avenue
Knoxville, TN 37917
(865) 594-3774

United Elevator Services
PO Box 1308
Knoxville, TN 37901

To whom it may concern

I am writing this letter to recommend United Elevator Services, LLC as a candidate for your TIPS program. They have proven to be dependable and consistently exceed expectations as a vendor for doing work in my schools. Their ability to analyze challenges, develop solutions, and collaborate with us makes them an asset to my workplace. The employees are friendly and very knowledgeable.

If you are looking for a company that is hardworking, dependable, and can-do problem-solving skills, I highly encourage you to consider United Elevator Services, LLC to be a member of your organization. Please do not hesitate to contact me if you need further insights.

Sincerely,

Mary Kington

Mary Kington

mkington@ccschools.k12tn.net
931-484-5763

CCBOE Maintenance Supervisor

736 Old Mail Road
Crossville, TN 38555

HAMBLEN COUNTY DEPARTMENT OF EDUCATION

210 East Morris Boulevard
Morristown, Tennessee 37813
Phone (423) 586-7700 • Fax (423) 586-7747

The mission of Hamblen County Schools is to educate students so they can be challenged to successfully compete in their chosen fields.

ARNOLD W. BUNCH, JR.
Superintendent of Schools

BOARD OF EDUCATION
Carolyn Clawson
Johnny Denton
Bradley Harville
Clyde Kinder
Darlene Smith
Jerrod Weems
Robert Workman

DATE: June 17, 2025

From: Jay Wilkes, supervisor of Maintenance Dept

Re: Reference letter for United Elevator

To whom it may concern, please accept this reference for United Elevator who has provided services for Hamblen County Dept of Education for several years. We understand that they have Submitted a proposal to Education Service Region 8 and the TIPS Cooperative.

United Elevator has performed outstanding service to our school Systems Elevators & we would highly recommend them to TIPS Public entity & non-profit members.

Hamblen County Dept of education would most certainly do business with United Elevator in the future.

Jay Wilkes

Jay Wilkes

JW/jas

TIPS CONTRACT 250502

REQUIRED CONFIDENTIALITY CLAIM FORM

(VENDOR MUST COMPLETE THE FOLLOWING VENDOR INFORMATION)

Vendor Entity Name: United Elevator Services, LLC

Vendor Authorized Signatory Name: Shawn Lyness

Vendor Authorized Signatory Title: Sales Manager

Vendor Authorized Signatory Email: shawnl@unitedelevator.com

Vendor Address: PO Box 1308

City: Knoxville State: TN Zip Code: 37901

Vendor agrees that it is voluntarily providing its data (including but not limited to: Vendor information, Vendor documentation, Vendor's proposal, Vendor pricing submitted or provided to TIPS, TIPS contract documents, TIPS correspondence, Vendor logos and images, Vendor's contact information, Vendor's brochures and commercial information, Vendor's financial information, Vendor's certifications, and any other Vendor information or documentation submitted to TIPS by Vendor and its agents) (Hereinafter, "Vendor Data") to TIPS. Vendor understands and agrees that TIPS is a government entity subject to public information laws including but not limited to Texas Government Code (TGC) Chapter 552. Vendor agrees that regardless of confidentiality designations herein, Vendor's submission of a proposal constitutes Vendor's consent to the disclosure and release of Vendor's Data and comprehensive proposal, including any information deemed confidential or proprietary herein, to and by TIPS Members.

Notwithstanding the foregoing permissible release to TIPS Members, if Vendor considers any portion of Vendor's proposal to be otherwise confidential and not subject to public disclosure pursuant to public information laws, including but not limited to TGC Chapter 552, Vendor must properly execute ***Option 1 only*** below, attach to this PDF all documents and information that Vendor deems confidential, and upload the consolidated documentation. Regardless of the Option selected below, this form must be completed and uploaded to the "Response Attachments" section of the eBid System entitled "Required Confidentiality Claim Form." Execution and submission of this form is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a request, a Public Information Request, or subpoena. If TIPS receives a request, any responsive documentation not deemed confidential by you through proper execution of Option 1 of this form will be automatically released. For information deemed confidential by you through proper execution of Option 1 of this form, TIPS will follow procedures of controlling statute(s) regarding withholding that documentation and shall not be liable for any release of information required by law, including Attorney General opinion or court order.

(VENDOR MUST COMPLETE ONE OF THE TWO OPTIONS AND UPLOAD IN THE EBID SYSTEM)

OPTION 1 – DESIGNATING CONFIDENTIAL MATERIALS – YES, VENDOR HAS ATTACHED CONFIDENTIAL MATERIALS

(Confirm each bullet point and sign below)

- Vendor claims some Vendor Data confidential to the extent permitted by TGC Chapter 552 and other applicable law.
- Vendor attached to this PDF all potentially confidential Vendor Data and listed the number of attached pages below.
- Vendor's authorized signatory has signed below and shall upload this document in the proper location in the eBid System.
- Vendor agrees that TIPS shall not be liable for any release of confidential information required by law.

Number of pages attached deemed confidential: _____

Authorized Signature: _____

OPTION 2 – WAIVER OF CONFIDENTIALITY – NO, VENDOR HAS NOT ATTACHED CONFIDENTIAL MATERIALS

(Confirm each bullet point and sign below)

By signing for Option 2 below, Vendor expressly waives any confidentiality claim for all Vendor Data submitted in relation to this proposal and resulting contract. Vendor confirms that TIPS may freely release Vendor Data submitted in relation to this proposal or resulting contract to any requestor. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of Vendor Data by TIPS or TIPS Members.

- Vendor's authorized signatory has signed below and shall upload this document in the proper location in the eBid System.
- Vendor agrees that TIPS shall not be liable for any release of confidential information required by law.

Authorized Signature: Shawn Lyness

BONDS
SOUTHEAST, INC.

June 16, 2025

Re: United Elevator Services, LLC
Knoxville, TN

To Whom It May Concern:

Please let this letter serve as our reference for United Elevator Services, LLC of Nashville and Knoxville, Tennessee pertaining to surety credit. We have provided surety bonds for United Elevator since 1995 and consider them to be an excellent organization. Currently, all surety bonds are written with Merchants Bonding Company (Mutual) who is licensed in all 50 states, is listed on the Department of the Treasury's Listing of Approved Sureties (Department Circular 570) and holds an "A" (Excellent) rating by A.M. Best Company.

During the time we have worked with United Elevator Services, LLC numerous bid, performance and payment bonds have been issued, and they are in good standing with our agency. United Elevator has a current bonding capacity to bond single jobs up to $1 million and aggregate up to $2.5 million with approximately $1.75 million currently available bonding capacity. Due to their highly valued relationship with United Elevator, Merchants Bonding Company has extended a special sliding premium rate for their bonds. The Surety's willingness to provide surety on this or any project is predicated upon specific criteria at the time of the bond request including, but not limited to, a review of all contract documents, bond forms, financing, and all other pertinent underwriting factors.

We highly value our relationship with United Elevator Services, LLC and consider them to be among the elite professionals in this area. If you should have any questions in this regard, please give us a call.

Sincerely,

Gregory E. Nash
President
GEN/klb

CONTRACT & COMMERCIAL SURETY BONDS
5550 FRANKLIN PIKE, STE 202 • NASHVILLE, TN 37220 • (615) 321-9700 • TOLL FREE: 1-877-99BONDS • FAX: (615) 321-9702

EMAIL PO & VENDOR QUOTE TO: TIPSPO@TIPS-USA.COM
PO AND QUOTE MUST REFERENCE VENDOR TIPS CONTRACT NUMBER
ATTACH PO AS A PDF - ONLY ONE PO (WITH QUOTE) PER ATTACHMENT

Notice:
Many Vendors utilize specific warranties, subscription agreements, license agreements, EULA's, etc. ("Supplemental Agreements") when you purchase specific goods or services from that Vendor. Since the Supplemental Agreements do not necessarily apply to every Member, every jurisdiction, or every purchase, TIPS does NOT now negotiate the terms of those agreements on Members' behalf. If you are required to sign such a supplementary agreement by the TIPS Vendor, TIPS strongly encourages Members not to proceed with a purchase until they have carefully reviewed and negotiated all applicable Supplemental Agreements. TIPS recommends you work with your entity's legal counsel to ensure compliance with the legal requirements of your entity and your jurisdiction.

TIPS Member PO Process

United Elevator Services

Print

Elevators and Servicing (25050201)
Exp.Date 07/31/2028 EDGAR: View Doc.

	Primary
Contact	Shawn Lyness
Title	Manager
Phone	(865) 573-0731
Email	shawnl@unitedelevator.com
	Secondary
Contact	Taylor Sawyer
Title	Executive
Phone	(865) 573-0731
Email	taylors@unitedelevator.com

Elevators and Servicing (JOC)(25050202)
Exp.Date 07/31/2027 EDGAR: View Doc.

DISADVANTAGED/MINORITY/WOMAN BUSINESS ENTERPRISE No

HISTORICALLY UNDERUTILIZED BUSINESS (HUB) No

STATES SERVED TN , KY , VA , WV , NC , SC , GA , AL , MS

Copyright 2005-2026 The Interlocal Purchasing System | Lead agency Region 8 ESC

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 04/08/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	**CONTACT NAME:** Connie Queener
Madison Insurance Group	**PHONE (A/C, No, Ext):** (865) 425-7300 **FAX (A/C, No):** (865) 483-5035
800 Oak Ridge Turnpike,	**E-MAIL ADDRESS:** connie.queener@miginsgroup.com
Suite B-200	
Oak Ridge TN 37830	

INSURER(S) AFFORDING COVERAGE		NAIC #
INSURER A :	Great American Insurance Company	16691
INSURER B :	Selective Insurance Co. of South Carolina	19259
INSURER C :	Zenith	13269
INSURER D :	Selective Insurance Company	12572
INSURER E :	National Union Fire Insurance Company	19445
INSURER F :	Technology Insurance Company	42376

INSURED

United Elevator Services, LLC 11442
P.O. Box 1308

Knoxville TN 37901

COVERAGES **CERTIFICATE NUMBER:** MASTER 2025-2026 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	[X] COMMERCIAL GENERAL LIABILITY [ ] CLAIMS-MADE [X] OCCUR [X] EMPLOYEE BENEFITS: $1M/1M, [ ] DEDUCTIBLE: $1,000 GEN'L AGGREGATE LIMIT APPLIES PER: [ ] POLICY [X] PRO-JECT [ ] LOC [ ] OTHER:			GLP132435809	04/01/2025	04/01/2026	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG Maximum Ann. Aggreg.	$ 1,000,000 $ 300,000 $ 10,000 $ 1,000,000 $ 4,000,000 $ 4,000,000 $ 10,000,000
B	AUTOMOBILE LIABILITY [X] ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [ ] HIRED AUTOS ONLY [ ] NON-OWNED AUTOS ONLY			S 2454443	04/01/2025	04/01/2026	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $
A	[X] UMBRELLA LIAB [X] OCCUR [ ] EXCESS LIAB [ ] CLAIMS-MADE [ ] DED [X] RETENTION $ 10,000			TUU490527902	04/01/2025	04/01/2026	EACH OCCURRENCE AGGREGATE	$ 10,000,000 $ 10,000,000 $
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N [Y] If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		M1145612	04/01/2025	04/01/2026	[X] PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ 1,000,000 $ 1,000,000 $ 1,000,000
D	EMPLOYMENT PRACTICES LIABILITY			MY 1015175	04/01/2025	04/01/2026	LIMIT: RETENTION EA CLAIM: PRIOR OR PNDG DATE:	$1,000,000 $7,500 7/10/2020

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Carrier E: Professional Liability Coverage / Policy#: 095054612 / Effective Date: 04/01/2025 / Expiration Date: 04/01/2026 / Limit of Insurance: $1,000,000 / Retention Amount: $5,000

Carrier F: Cyber Liability Coverage / Policy#TCL1741394-01 / Effective Date: 04/01/2025 / Expiration Date: 04/01/2026 / Aggregate Limit of Liability: $1,000,000 / Retention: $5,000

CONTRACT# 2472-3011

CERTIFICATE HOLDER

KNOX COUNTY PROCUREMENT DIVISION
1000 N CENTRAL STREET, STE 100

KNOXVILLE TN 37917

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Elizabeth King

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AFFIDAVIT OF COMPLIANCE

WITH

TENNESSEE CRIMINAL HISTORY RECORDS CHECK

TENNESSEE CODE ANNOTATED, SECTION 49-5-413

(To be submitted with bid by contractor)

I, John Tolar, president or other principal

Officer of United Elevator Services, LLC, swear or affirm that the
Name of Company
Company is in compliance with Public Chapter 587 of 2007, codified at Tennessee Code Annotated 49-5-413, in effect at the time of this bid submission at least to the extent required of governmental entities. I further swear or affirm that the company is in compliance with Tennessee Code Annotated, § 49-5-413.

President or Principal Officer John Tolar

For: United Elevator Services, LLC
Name of Company

STATE OF TENNESSEE}
COUNTY OF Knox }

Subscribed and sworn before me by John Tolar,

President or Principal Officer of United Elevator Services LLC

On this 13 day of December 2023.

Lori Gibson
Notary Public

My Commission expires: July 6, 2025

LORI GIBSON
STATE OF TENNESSEE NOTARY PUBLIC
KNOX COUNTY

KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

Maintenance and Inspections of KCS elevators and lifts.

Cost to Knox County Schools

$90,905 (Inspections) $80,166 (Maintenance)

Description and Type of Funding Source

141 172620 533400 (Inspections) 141 172610 533500 (Maintenance)

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

RLA-18202 **R-26-3-204**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	TERRI COATNEY, KNOX COUNTY SCHOOLS
Department:	KNOX COUNTY SCHOOLS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Fund Balance Designation (General Purpose School Fund) in the amount of $8,610,000.00 for the purchase of newly adopted textbooks and instructional materials for PE, Health and Wellness and Career and Technical Education.
(Schools)

Attachments

Resolution
Detail
Fiscal Note

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A FUND BALANCE DESIGNATION (GENERAL PURPOSE SCHOOL FUND) IN THE AMOUNT OF $8,610,000.00 FOR THE PURCHASE OF NEWLY ADOPTED TEXTBOOKS AND INSTRUCTIONAL MATERIALS FOR PE, HEALTH AND WELLNESS AND CAREER AND TECHNICAL EDUCATION.

RESOLUTION: **R-26-3-204**

REQUESTED BY: **SCHOOLS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, the General Purpose School Fund Balance currently exceeds the three percent (3%) of the budgeted annual operating expenses for the current fiscal year that is required by state law to be maintained in fund balance; and

WHEREAS, state law requires that an appropriation from funds in excess of three percent (3%) of the Knox County Schools operating budget be submitted to, and approved by, the Knox County Commission; and

WHEREAS, Knox County Schools has requested a General Purpose School Fund Balance Designation in the amount of $8,610,000.00 for the purchase of newly adopted textbooks and instructional materials for PE, Health and Wellness and Career and Technical Education; and

WHEREAS, the Knox County Board of Education approved this Fund Balance Designation at its regularly scheduled meeting on March 5, 2026.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby approves a Fund Balance Designation from the General Purpose School Fund in the amount of $8,610,000.00 for the purchase of newly adopted textbooks and instructional materials for PE, Health and Wellness and Career and Technical Education, as further detailed in the documentation attached hereto and incorporated herein by reference.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare, requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

KNOX COUNTY SCHOOLS
ACADEMIC SUPPORTS

Sarah Searles
Supervisor of Academic Resources

Candice Janco
Administrative Assistant

[865] 594-2975

MEMORANDUM

TO: Dr. Keith Wilson, Assistant Superintendent of Academics

FROM: Sarah Searles, Supervisor of Academic Resources

DATE: February 11, 2026

RE: PE Health & Wellness and Career & Technical Education Textbook Adoption

Dear Dr. Wilson et al,

In collaboration with Mr. Matthew Mosely, Director of Career & Technical Education, and Ms. Kara Rickard, PE Health & Wellness Specialist, I am writing to request that an item be added to the March 5, 2026 Board of Education agenda to approve their 2026 curriculum adoption.

Attached please find the following documents:

- ED-2153 Certification of Adoption
- ED-5099 Record of District Adopted Materials
- Local Addendum to ED-5099 for Middle School Health, which is not part of the State's Section E adoption cycle
- State panel reviews for each material, documenting quality and standards coverage

These curriculum selections reflect the work of the Adoption Committee members, who were approved by the Board on January 8, 2026. They evaluated each material using both Tennessee standards for high-quality instructional materials and practical experience implementing the materials. Opportunity was also provided for public review of materials via the State's website.

Respectfully submitted,

Sarah Culp Searles

Sarah Culp Searles

TN Department of Education

Return by June 30 via email to:
academics.instruction@tn.gov

Certification of Adoption by Local Board of Education

The Knox County Schools Board of Education approved the City, County, or Special School District adoption of the textbooks as indicated on the attached Local Adoption Report Abstract during the meeting of the board on March 5, 2026.

Month, Day, Year

If the LEA has chosen to adopt any materials not on contract, then we do hereby certify the following:

- ☑ The LEA's unique needs require adopting materials not on the state's official list.
- ☑ The materials adopted by this LEA were screened by a review committee, appointed in accordance with T.C.A. § 49-6-2207 and were determined to be aligned to the standards by evaluating the materials using the screening instrument approved by the Textbook and Instructional Materials Quality Commission.
- ☑ The adoption abstract, this certification of adoption, and the local panels' reviews will be posted to the LEA's website within 30 days of local board approval.
- ☑ All materials adopted by this LEA that are not on contract have been approved by waiver (if any waivers were granted, you must attach them to this form).
- ☑ The LEA agrees to furnish any materials requested by TDOE for review.

Date	**Chairman, Board of Education**
Date	**Director of Schools**

ED-2153

ED-5099

Form ED-5099 creates an official record of district adopted materials. In submitting this form, the district is ensuring that the materials selected adhere to the following state statutes governing the selection and adoption of instructional materials in the state of Tennessee: T.C.A. § 49-6-2206 (Prohibition of Common Core) and T.C.A. § 49-6-1019 (Prohibited Content).

Directions: To complete this form, fill in your name on row 8. Then use the drop down menus to complete the remaining elements. If you have an approved waiver, use the second tab on this form. Waiver selections must be hand entered. Submit documentation of the waiver approval along with this document.

System Name:	Knox County Schools
State System Number:	470
Intent to Purchase:	Yes
Submitted By:	Sarah Searles

Publisher	Book Title	Grade/Course	District Notes
Goodheart-Willcox Publisher	Essential Health Skills for High School	High School Wellness	Teachers are currently using as a pilot for the 2025-2026 school year
CodeHS	Tennessee Coding I	Coding	
CodeHS	Tennessee Cybersecurity I	Cybersecurity	

Local Addendum to ED-5099

This form will be submitted alongside ED-5099 to document materials selected by KCS for a course that is not part of the Section E adoption cycle.

System Name:	Knox County Schools
State System Number:	470
Intent to Purchase:	Yes
Submitted By:	Sarah Searles

Publisher	Book Title	Grade/Course	Notes
Goodheart-Willcox Publisher	Essential Health Skills for Middle School	Middle School 6th-8th Health	Teachers are currently using as a pilot for the 2025-2026 school year

Course Number & Name	Publisher
G08H02 Lifetime Wellness	Goodheart Wilcox
Table 1 - Instructional Focus	Compiled Reviewer Comments
Clear health goals and behavioral outcomes	•Goals and outcomes are reinforced throughout the materials.
Research-based and theory-driven	•Student and instructor resources are based on theory and research.
Focus on protective factors	•Focus on protective factors and risks of engaging in behaviors or exposure to unhealthy situations present. Module 6 p. 327
Skills-based	•Builds essential skills throughout all units.
Age appropriate and developmentally appropriate	•Age appropriate in developmental and emotional maturity and concepts.
Teacher information	•Teacher resources are ample in implementing strageties and facilitating skills based student assessments.
Table 2-Compliance with Relevant Health Education Laws	Compiled Reviewer Comments
T.C.A. 49-6-1302 Curriculum for Family Life Education	•Due to the criteria not being met for T.C.A. 49-6-1304 this is also not met.
T.C.A. 49-6-1304 Family Life Instruction	•According to T.C.A 49-6-1304 Family Life Instruction section 14 c. •The curriculum is missing a high quality computer generated animation or high-definition ultrasound of at least 3 minutes in duration. •That shows the development of the brain, heart, and other vital organs.
Table 3-Accessibility Features	Compiled Reviewer Comments
All lessons within the materials are available in digital form and include a printable option	No comments
In every lesson, materials include recommended supports, accomodations, and modifications for Students with Disabilities and English learners that will support their regular and active participation in accessing on grade level material (e.g., modifying vocabulary words within word problems, sentence starters, etc)	•Not present in every lesson

Table 4- Alignment of Content	Compiled Reviewer Comments
Conceptual Understanding: The materials support the intentional development of students' conceptual understanding of key health ideas, practice, and concepts.	•All materials work toward student understanding
HS.PW.1 identiify the relationship between healthy eating and total wellness	•Very detailed, informative charts - figures 4.1.4 & 4.1.5 p. 203-205 / Pairing proteins - figure 4.2.8 p. 217 •Has multiple comparisons of nutrition and health wellness
HS.PW.2 Evaluate personal nutritional and energy needs.	•covered in multiple lessons •Individual work and case studies
HW.PW.3 Examine the relationship between diet and disease (e.g. metabolic syndrome, hypertension, hyperlipidemia)	•nutrition sheet
HW.PW.4 Implement the health-related and skill-related components of fitness	•Research in action - p. 233, figure 4.4.1 p. 231 / Making a physical activity and fitness plan. p. 243 •Good fitness planning and goal setting
HS.PW.5 Analyze and engage in physical activities that are develpmentally appropriate and support achievement of personal fitness	•covered in lesson 12 •age appropriate and good ideas for all
HS.PW.6 Describe and apply principles related to physical activity (i.e, principles of training, target heart rate, warm-up/cool-down)	•covered in lesson 8 •no real warm up/cool down
HS.PW.7 Construct fitness goals (i.e. S.M.A.R.T.)	•Introduced early then used throughout lessons
HS.PW.8 Explain the importance of preventative health care and how it contribures to overall wellness	no comments
HS.PW.9 Identify and explain signs, symptoms, screenings, treatment, and prevention of chronic or non-infectious diseases (e.g. cardiovascular disease, cancer, diabetes)	no comments
HS.PW.10 Identify and explain signs, symptoms, screenings, treatment, and prevention of infectious diseases (e.g. Influenza, COVID, strep, hepatitis, measles, STIs, etc)	•Case study - Blocking germs everyday - p.434
HS.PW.11 Analyze the difference between infectious and non-infectious disease.	no comments

HS.PW.12 and implement the strategies for preventing disease (e.g. personal hygiene, health screenings, vaccination)	no comments
HS.MESH.1 Identify emotions and their effects on the mind and body	•Positive mindset - figure 2.6.2 / How does mindset affect aging. p. 123
HS.MESH.2 Recognize stressors and formulate personal stress management techniques	•ID then formulation of great progression
HS.MESH.3 Design useful strategies for suicide prevention	•Positive steps at all levels of assistance
HS.MESH.4 Identify ways to develop self-care behaviors	no comments
HS.MESH.5 Identify and explain adverse childhood experiences	no comments
HS.MESH.6 Examine characteristics of mental health conditions (i.e. anxiety, depression, and eating)	•Know when you need help. p. 179
HS.MESH.7 Describe the stages of grief	•Stages of grief. p.195 figure 3.6.5
HS.MESH. 8 Explain when to seek help for mental and emotional health concerns (provide local resources and national 988)	no comments
HS.MESH.9 Identify positive ways of resolving interpersonal conflict.	•Covered well
HS.MESH.10 Demonstrate appropriate refusal skills (e.g. drugs, relationships, sexual activity)	•Case study - Peer pressure in action. p. 74 •Covered well
HS.FAS.1 Identify and demonstrate the skills necessary in responding to medical emergencies (e.g. common injuries, AED, choking).	•Discussed, all basics covered
HS.FAS.2 Demonstrate hands-on CPR	•Hands only for right age
HS.VOS.1 Explain increased potential of injury when employing high risk behaviors while operating and occupying a vehicle (e.g. distracted driving, impaired driving, seat belt safety, and pedestrians).	•Motor vehicle safety. p. 332-333 figure 6.1.5 p. 333
HS.VOS.2 Explain the four levels of the Tennessee Graduated Driver's License laws.	no comments
HS.TS.1 Identify how people utilize technology to build relationships and to abuse and exploit relationships.	no comments
HS.TS.2 Identify the risks associated with sexting.	no comments

HS.TS.3 Define online sexual exploitation.	no comments
HS.TS.4 Explain ways to create and maintain a safe, positive online environment.	no comments
HS.HGD.1 Examine the aspects of positive relationships (e.g. family, dating, friendship, professional, community)	•Good lessons with both positive and negative sides
HS.HGD.2 Determine the influence of families, media, cultural tradition, and econimic factors on human development.	•Good development information
HS.HGD.3 Define types of abuse where the victim is a child, such as neglect, physical, emotional, and sexual abuse, including abuse that may occur in the home, and human trafficking.	no comments
HS.HGD.4 Evaluate how to reduce risks of becoming a victim of abuse and the process to report.	•Module 10 supplement
HS.HGD.5 Explain methods to reduce your risk of becoming a victim of abuse and identify methods for seeking help from a trusted adult and community resources for reporting.	•In supplement
HS.HGD.6 Discuss the detection, intervention, prevention, and treatment of human trafficking for children and adults.	•In supplemental material
HS.HGD.7 Explain basic structures and functions of the reproductive system as they relate to the human life cycle (e.g. conception, birth, childhood, adolescence, adulthood)	•Organs of the reproductive system. p. 3-9 figures 9.1.1 and 9.2.1
HS.HGD.8 Recgonize abstinence from all sexual activity as a positive choice.	•Lesson 9.7
HS.HGD.9 Identify preventative methods and potential outcomes of engaging in sexual behaviors (e.g. pregnancy, abstinence, adoption, Hepatitis B, STIs). Compare various contraceptive methods in accordance with state/district policy.	•information in two prongs abstinence in text then sent to family for more
HS.HGD.10 Research the skills necessary for maintaining reproductive health (e.g. self-examinations, annual doctor visits, prenatal care).	•throughout lessons

HS.HGD.11 Explain adoption and the types of adoption (open, semi-open, and closed).	•in supplemental material
HS.HGD.12 Analyze the benefits of adoption.	•in supplemental material
HS.HGD.13 Identify and give examples of multi-cultural, blended, or "different" families (adoption or foster).	•in supplemental material
HS.SUA.1 Describe the proper use of over the counter and prescription drugs.	•p. 255-256 figures 5.1.1 & 5.1.2 •does a great job with this standard
HS.SUA.2 Predict the benefits of a lifestyle free from chemical misuse (e.g. career goals, healthy relationships, life expectancy).	•Good goals and how all work together
HS.SUA.3 Summarize the consequences of drug use. (i.e. alcohol, tobacco, [e-cigs/vaping], prescription medications, marijuana, etc.).	•Case study - The impact of alcohol p. 291 / Research in action - your brain on drugs p.299
HS.SUA.4 Analyze the role of family, community, and cultural norms in deciding to use drugs.	•pgs 314-316
HS.SUA.5 Articulate the effects of substance misuse and abuse on society (e.g. on school, job, crime, physical enhancement).	•pgs 301-302
HS.SUA.6 Identify common warning signs of opioid and IV drug abuse.	•drug information good but warning signs minimal layout
HS.SUA.7 Identify common symptoms of opioid prescription and IV drug overdose.	•withdrawal negative effect but overdose s/s not there
HS.SUA.8 Demonstrate how to tell a trusted adult that someone you know may be misusing drugs.	•self help but practice of helping others minimal
HS.SUA.9 Identify ingredients present in e-cigarettes and vape devices.	•pg 278
HS.SUA.10 Recognize the myths about the safety of vaping.	•pgs 273/278
HS.SUA.11 Identify the health risks associated with vaping caused by both the vaping device mechanism and the ingredients.	•covered pg 278

Course		Publisher
Number	Name	
C10H13	Coding I	CodeHS
Table 1-Instructional Focus		Compiled Reviewer Comments
Student Engagement		•Aligned to grade level; •Has engaging graphs, charts, images, videos, slides throughout each lesson
Activity Aligned to Grade Level		•Activities build proficiency by having student practice and problem-solve coding issues
Use of Current Industry Practices		•Reflects current industry practices
Career Exploration		•One lesson found with overview of careers in computer science and coding
Instructional Materials		•Curriculum goes above and beyone with available resources and instructional materials (handouts, lesson plans, accomodations, solutions guides, etc) in both digital and printable versions.
Table 2-Attending to Skill		Compiled Reviewer Comments
Safety Practices		•No specific lesson regarding safety practices but cybersecurity threats and security are mentioned throughout the text
Proper Equipment and Tool Usage		•While proper computer and program usage is taught, it is not defined as 'Proper Equipment & Tool Usage'
Performance-Based Tasks		•Program allows for a multitude of hands on practice, projects, critical thinking opportunities in every section.
Developing Employability Skills		•One lesson gives an overview of careers in computer science and coding
Table 3-Accessibility Features		Compiled Reviewer Comments
All lessons within the materials are available in digital form and include a printable option.		
In every lesson, materials include recommended supports, accommodations, and modifications for Students with Disabilities and English language learners that will support their regular and active participation in accessing on grade level material (e.g. modifying vocabulary words witin word		•Accomodations were found
Table 5- Coding I Alignment of		Compiled Reviewer Comments

1.1 Development of Computers and Logical Devices	•Activities require the student to do research and create timeline
1.2 Programming Language	•Overview of programming languages, constants, variables, and data types; interpreters vs. compilers; •Students research programming languages, analyze benefits, compare uses, summarize findings
3.1 System Level and Application Practices	•Info regarding copyrights, hackers, creative commons, cybersecurity laws, open source software
3.2 System Management Tools	•Provides a multitude of practice opportunities throughout several sections of curriculum
3.3 Developing and Implementing Strategies	•CLI vs high-level language programming and best use for each
3.4 Flowchart	•Provides projects to create interactive flowcharts that require critical thinking and creativity skills and pseudocode
3.5 Data Values	•Discuss variables, string, numeric and integers; •Slides discuss arrays with activities for practicing coding arrays
3.6 Code Design	•Section has multiple projects that provide hands on practice, require critical thinking, and creativity regarding if/else statements, loops, rapid prototyping, flowcharting, pseudocode, and QA. •Offers activities for creating a paper prototype, flowchart, pseudocode and QAP.
3.7 Operation of Program Code	•Input validation, activities for student to identify program errors in looping and basic code validation
4.1 Computer Programming Problem and Client Specifications	•Provides multiple projects and opportunities for students to collaborate, research, and practice criticial thinking skills. •Also circles back to previous standards and reinforces them.
4.2 Project Plan	•Development life cycle; •Students create a simple app to solve an everyday problem using development process; •Analyze problems, explain quality assurance, testing, debugging, reviewing
4.3 Nature of the Program	•User testing, developing a plan, conducting testing, improving apps
4.4 Quality Assurance	
4.5 Security Risks	•Vulnerabilities, cyber threats, and attacks with activities simulating the identification and exploiting those vulnerabilities; •Cybersecurity laws, risk management

5.1 Team Project with Data Analysis	•Plentiful information in text for student to complete the problem and research activity identified

Course Number & Name	Publisher
C10H19 Cybersecurity I	CodeHS
Table 1-Instructional Focus	Compiled Reviewer Comments
Student Engagement	•Text is aligned to grade-level and have some engaging graphs, charts, and/or images.
Activity Aligned to Grade Level	•Activities reinforce knowledge and skills aligned with grade-level standards. •Most activities are CodeHS based (meaning they can only be submitted in CodeHS format).
Use of Current Industry Practices	•Industry practices in website development are relevant and reflect surrent industry practices.
Career Exploration	•Some videos about careers in cybersecurity are present in the content. •In addition to industry practices being used and mentioned throughout the materials, Industry Relevant Computer Science Certifications for Students are available for a fee as well
Instructional Materials	•Materials contain several types (lesson plans, differentiation techniques, handouts, solutions guides, etc.) of supplemental instructional materials.
Table 2-Attending to Skill Development	Compiled Reviewer Comments
Safety Practices	Safety is mentioned in lesson 11.4
Proper Equipment and Tool Usage	The materials mention different tools to implement practical cybersecurity.
Performance-Based Tasks	Every lesson has performance based tasks in the materials.
Developing Employability Skills	There is a CodeHS Career Center that has a welath of information inclusing employability skills.
Table 3-Accessibility Features	Compiled Reviewer Comments
All lessons within the materials are available in digital form and include a printable option.	All materials are digital and can be printed, but there is not an actual "printable option" available for my review.
In every lesson, materials include recommended supports, accommodations, and modifications for Students with Disabilities and English language learners that will support their regular and active participation in accessing on grade level material (e.g. modifying vocabulary words within word problems, sentence starters, etc)	There are supports there, but most of the supports are suggestive without actually providing the material itself. For example in lesson 1.1 there is the following modification: All materials are digital and can be printed, but there is not an actual "printable option"."Modification: English Language Learners Provide students with a handout that includes key words and their definitions: digital footprint, reputation, permanent, cyberbullying." also "Based on students' reading levels, differentiate the article in this lesson by decreasing the amount of unnecessary technical vocabulary and deleting unnecessary text; or, have students read the article with a peer." These modifications are suggestive but do not provide anything further as an actual copy of the document with the modifications already there. This is consistant throughout all of the materials.

Table - Alignment of Content	Compiled Reviewer Comments
1.1 Ethical Security Practices	•Security practices are in the following lessons 1.4 Cyber Ethics and Laws, yberethics, responsible internet use, and the impact of copyright and licenses on the digital world. •There is also a video on getting permission. 1.6 Cybersecurity Essentials- core concepts of cybersecurity, focusing on the importance of protecting information and devices in the digital world. •There is also a cyber bullying notebook video.
1.2 Breaches	•1.7 Common Cyber Attacks and Prevention-software licenses as well as the different methods of installing software based on the application's architecture are in this lesson.
1.3 Threats	•7.6 Checking for Vulnerabilities-vulnerabilities, cyber threats, and attacks on networks and organizations. •Students simulate identifying and exploiting vulnerabilities are in this lesson. 7.7 Risky Business- Students are introduced to the Risk Management process. They will learn how to identify, analyze, reduce, and monitor risk.
2.1 Risk Management	•7.6 Checking for Vulnerabilities- In this lesson students run and analyze simulated nmap scans, identify key vulnerabilities in a fictional organization, and develop plans to attack vulnerabilities. •Students also analyze a high-profile data breach to understand the threats, vulnerabilities, and exploits involved. 7.7 Risky Business- In this lesson students learn to identify and explain the major steps of Risk Management. They also utilize the Risk Management process to mitigate network threats and vulnerabilitie, and identify how the Risk Management process can prevent attacks. There is also a risk management video.
2.2 Risk Assessment	•7.6 Checking for Vulnerabilities Here there are activities for checking vulnerabilities 7.7 Risky BusinessIn this lesson, students are introduced to the Risk Management process. •They will learn how to identify, analyze, reduce, and monitor risk. 7.8 Risk Response-Students continue to deepen their understanding of risk assessment. •Students learn how to prioritize and respond to different threats by calculating risk, both quantitatively and qualitatively. •Students Explain the different ways to respond to risk: avoidance, transfer, mitigation, and acceptance. •Mitigation, avoidance, and transfer are not all mentioned in reference to using a simulation for the common industry framework from ISO.

3.1 Access Control	•1.5 Personal Data Security- Students will create an infographic to visually summarize the concepts of Access Control. •Students learn about the importance of personal data security and explore different forms of authentication and browser security settings. Students then consider the tradeoffs between ease of use and security when implementing different authentication methods. •In this lesson students define authentication terms: passphrase, multifactor authentication, 2FA, biometric authentication, and password managers. •Students evaluate different forms of authentication. •They will also explain how to use privacy settings on their browser to enhance security. •Students consider the tradeoffs between usability and security measures, define and explain the concepts of Access Control, Authentication, and Authorization using clear and concise language. 1.6 Cybersecurity -students are introduced to the core concepts of cybersecurity, focusing on the importance of protecting information and devices in the digital world. •Students will explore key vocabulary terms, security frameworks, and the potential risks associated with the Internet of Things (IoT). •Students also analyze how the AAA Security Framework (Authentication, Authorization, and Accounting) helps protect online information.
3.2 Principles of Access Controls	•1.5 Personal Data Security- Students define and explain the concepts of Access Control. •There is also an access control infographic activity. •Students learn about the importance of personal data security and explore different forms of authentication and browser security settings. •Students then consider the tradeoffs between ease of use and security when implementing different authentication methods. 1.6 Cybersecurity Essentials-students are introduced to the core concepts of cybersecurity, focusing on the importance of protecting information and devices in the digital world. Students will explore key vocabulary terms, security frameworks, and the potential risks associated with the Internet of Things (IoT).
3.3 Use of Access Controls	•3.9 System Administration-Students learn how to use user accounts and permissions to secure a device. •Students describe how creating user accounts and permissions enhances security, define system hardening and explain the importance of establishing baseline security, password complexity, account restrictions) in maintaining system security. Students also explain common security best practices related to password management, account control, and user access.

4.1 Local Area Network (LAN)	•5.9 Network Administrator-not covered 5.13 Private Networks- not covered 6.1 Project: The Inside Scoop on LANs All parts of the standard are covered in this lesson. •Common lLAN methodologies, LAN topologies, standards of Ethernet, and characteristics of land cabling are all mentioned in this lesson only.
4.2 Wireless Networks	•2.4 Authentication Methods Wireless networks are not mentioned here in reference to industry standards.
4.3 Routing Protocols	•4.6 Routing and Packets - In this lesson there is a video that has introduction to routing. •There are also HTML notes about static vs. dynamic routing. •There is also a task to create a visual display that compares and contrasts these two methods.
4.4 Installation	•5.15 Lab: Setting up Remote Access: There is a lab there but the link to access the lab does not work. •When clicked on the link it has "This page is not found."
4.5 WAN Networks	•5.13 Private Networks Topologies and technologies are not mentioned here in the lesson however they are referenced in the standards that associate with the lesson.
4.6 Internet Connectivity	•5.14 DMZs and VPNs The Changes throughtout history for small business and personal internet connectivity and how they have changed are not mentioned here.
5.1 OSI	•5.15 Lab: Setting up Remote Access- OSI model and functions are not available here in this lesson. •The ifgormation concerning OSI and the layers are in 4.8.
5.2 Networking Models	•4.8 OSI Model- There is a rapid research project where students research TCP/IP ans OSI, but the information for TCP/IP is not directly referenced in the material.
5.3 Data Transmission	•5.13 Private Networks 5.14 DMZs and VPNs The services DNS, NAT, and DHCP are mentioned but they are not defined here in the materials. •The activity suggest that studts research to find the definitions and descriptions.
5.4 Addressing Technologies	•4.5 IP Addresses There is an exercise here "The IT director at your company is considering upgrading from IPv4 to IPv6. •As the new technology consultant, you have been asked to write a brief presentation to help the team understand the differences and decide if upgrading is a good idea." •The information needed to complete the task must obtained from an outside source.
5.5 Subnets	• 5.9 Network Administrator Subnets are defined and a video is also provided about subnets. •There is also a research activity, where students will design a simple network with subnets for different organizational locations.5.13 Private Networks

5.6 Client Server Network	•5.9 Network Administrator- Research client server networks: In this research activity, students will research, analyze, and describe the features and requirements of a client-server network and how network services function in a Windows environment.
6.1 Types of Networks	•5.13 Private Networks: This lesson contains activities such as: 5.13.3 Coffee Shop: Design an Intranet, 5.13.4 What is an Extranet?, and 5.13.5 Internet, Intranets, and Extranets.
6.2 Secure Networks	•5.11 Network Management, 5.13 Private Networks, 5.16 More about Network: Students research and compare key network security protocols and services, design a secure network topology for a coffee shop and justify their choices, and analyze the history of internet connectivity and its impact on users and businesses. •Students also create a visual timeline showcasing major advancements in internet technology.
7.1 Network Security Devices	•5.9 Network Administrator Research: Network Security Devices and Storage Media exercise: In this research activity, students will research and analyze various network security devices and storage media, organizing their findings into a table or graphic organizer. •Students will explore the purpose, characteristics, and proper maintenance of each device and demonstrate correct installation and configuration.
7.2 Simple Secure Networks	•5.13 Private Networks 5.14 DMZs and VPNs 5.15 Lab: Setting up Remote Access 5.16 More about Networks 5.13 Private Networks 5.14 DMZs and VPNs 5.15 Lab: Setting up Remote Access 5.16 More about Networks Students complete a Coffee Shop: Network Diagram where they choose a network topology that includes a variety of security measures such as firewalls, a NAT device, MAC filtering, a DMZ, etc as well as the basic components of a functional network (servers, router, etc).
8.1 Networking Commands	•3.10 Command Line Interface: There is not a range of resources available. •There is only one chart and a video to synthesize the required information. •Outside sources must be used to address all parts of the standard.

8.2 Command Line Utilities	•3.10 Command Line Interface:There is a Command line interface video and quiz., 5.10 Network Communication:Iptables is a command-line firewall utility built for Linux operating systems. •There are GUI alternatives to iptables as well. •In the activity students will practice writing firewall settings in the command line., 5.11 Network Management There is a command line flow chart exercise where students construct a flowchart that a security analyst could use when troubleshooting or securing a network. •The flowchart should include decision points based on the output of networking commands.
9.1 Operating and File Systems	•3.1 Operating Systems There is an Introduction to operating systems video and a operating systems practice with a quiz as well as a step inside operating systems activity. •File systems are not mentioned here.
9.2 Security Threats	•1.7 Common Cyber Attacks and Prevention There is a presentation with embeded videos on protecting your computer.•There is also a phishing video., 7.5 Environmental Controls. •There is and exercise about designing a security system for a top secret government building. •All of the prevention methods are not included.
9.3 Recent Threats	•5.6 Network Options:Research: Threats to Networking Environments, In this research task, students will write a report on a recent cybersecurity threat that affects computer networks. •They must find a real-life example of a recent network cyberattack from a news report or blog. •Then explain the attack techniques or security problems that were used or faced in the article. •Some examples include ransomware, phishing, and denial-of-service (DoS) attacks., 7.6 Checking for Vulnerabilities, 7.7 Risky Business
9.4 Network Attacks	•5.6 Network Options HTML notes: Network versus application attacks: Threats vs. Vulnerabilities: Let's review some basic cybersecurity terminology. •A threat is a potential danger that could exploit a weakness in a system. •An example of a threat is a hacker trying to steal your personal data. •A vulnerability is a weakness in a system that a threat can take advantage of. For example, if your password is "123456," that's a vulnerability because it's easy to guess! You can think of it like this - if you leave your house unlocked (vulnerability), a burglar (threat) might break in. •There is also more information on network attacks and application attacks with buttons to click to see how each attack works with an example , 7.6 Checking for Vulnerabilities, 7.7 Risky Business

9.5 Anti-virus Software Installation	•3.6 Application Security 3.7 Lab: Anti-virus Software Installation:There is an activity on installing and configuring antivirus software but the directions are not directly inside of the materials. •Materials ask Students to research directions on how to install and configure the software.
10.1 Security Procedures	•1.7 Common Cyber Attacks and Prevention: Firewall is also mentioned along with commom tips to prevent attacks are mentioned, but Features and requirements of common security procedures used to protect system resources on a network are not mentioned here.
10.2 Baseline Security Measures	•3.9 System Administration:There was not enough information given to create a baseline security measure from the materials.
10.3 Storage Devices and Backup Media	•5.4 Storage Options: The materials provide a video and a list of items to research, but does not go into detail. •Outside research must be used to complete all parts of the standard.
10.4 File and Folder Permissions	•3.9 System Administration: There is not a Windows and Linux component.
10.5 Security Protocols	•5.13 Private Networks 5.16 More about Networks Protocols and services are in the materials but, all of the information needed to complete all parts of the standard are not included in the materials. •Outside research must be completed.
11.1 History of Cryptology	•10.2 Cryptography There is a quiz and a reflection but this lesson does not go into a detailed history of crytography.
11.2 Use of Cryptology	•5.13 Private Networks 5.16 More about Networks Cryptology not mentioned here.
12.1 Team Project with Data Analysis	•8.1 Engineering Design Process 8.2 Research and Analyze 8.3 Define 8.4 Ideate 8.5 Prototype 8.6 Test 8.7 Showcase Your Creation! Data analysis and teamwork is addressed here. •There is a research and analysis as well as a showcase here.

KNOX COUNTY BOARD OF EDUCATION

This Document is approved by the Knox County Board of Education on the 5th day of March, 2026 as reflected in its minutes, and certified by its Chairperson.

_____

Kristi Kristy, Chair

Date: _____

KNOX COUNTY GOVERNMENT

_____

Glenn Jacobs, Mayor

Date: _____

KNOX COUNTY LAW DEPARTMENT

CONTRACT #: 26-106

APPROVED AS TO LEGAL FORM

_____

Gary Dupler, Deputy Law Director

Date: 2/20/2026

KNOX COUNTY BOARD OF EDUCATION

Agenda Item Fiscal Note

Description

Approve adoption of textbooks and instructional materials for PE Health & Wellness and Career & Technical Education

Cost to Knox County Schools

n/a

Description and Type of Funding Source

n/a

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

RLA-18203 **R-26-3-205**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	TERRI COATNEY, KNOX COUNTY SCHOOLS
Department:	KNOX COUNTY SCHOOLS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving receipt of a Knox County Government Grant for Carter High School in the amount of $62,700.00, with required matching funds in the amount of $62,700.00. *(Schools)*

Attachments

Resolution

Detail

Fiscal Note

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING RECEIPT OF A KNOX COUNTY GOVERNMENT GRANT FOR CARTER HIGH SCHOOL IN THE AMOUNT OF $62,700.00 WITH REQUIRED MATCHING FUNDS IN THE AMOUNT OF $62,700.00.

RESOLUTION: **R-26-3-205**

REQUESTED BY: **SCHOOLS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, by means of Resolution R-22-10-801, the Knox County Commission approved an updated Knox County/Knox County Schools Grant Policy for the purpose of establishing guidelines for the distribution of funds to support various projects for the benefit of the students within the Knox County School System, to ensure proper oversight of all funds appropriated by the County, and to ensure proper administration and accounting of all grants; and

WHEREAS, Carter High School has been approved for funding from Knox County Government under the Knox County/Knox County Schools Grant Policy in the amount of $62,700.00 with required matching funds in the amount of $62,700.00; and

WHEREAS, at its regularly scheduled meeting on March 5, 2026, the Knox County Board of Education approved the receipt of a Knox County Government Grant for Carter High School in the amount of $62,700.00, with required matching funds in the amount of $62,700.00.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby approves Knox County Schools' receipt of a Knox County Government Grant for Carter High School in the amount of $62,700.00, with required matching funds in the amount of $62,700.00.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

KNOX COUNTY BOARD OF EDUCATION

INTERNAL SCHOOL FUNDS
PURCHASE APPROVAL REQUEST

1) School Carter High School Date 1/12/2026

2) Item(s) to be Purchased (Note 1)

1) Garage Doors (5) - Overhead Garage Door
2) Electronic Sign - SignCo
3) Parking Lot Striping - Stripe All
4) Campus Directional Signage - Sycamore Signs

Attach additional page(s) as necessary

3) Purchase Amount (Note 2) $ 120,221.30

4) Vendor Overhead Garage Door , SignCo, Stripe All , Sycamore Signs

5) Source(s) of Funding (Funds must be currently available)
(Examples: School Coupon Book Sales Receipts, PTO/PTA, Booster Club, General School Funds, etc.)

Source 1	Truist Rebate	Account Number	907.146	Amount $	6441.28
Source 2	Royalities	Account Number	907.182	Amount $	180.01
Source 3	Haslam Families	Account Number	907.233	Amount $	128.03
Source 4	Regular Instruction	Account Number	911.502	Amount $	7000.94

Total (Should Equal Item #3 Above) $ _____

I certify that the purchase(s) requested above will be made in accordance with all applicable provisions of Knox County Board of Education Policy and the Tennessee Internal School Financial Management Manual.

Signed: _____

Principal: Steve Kiellas

Date: 1/12/2026

Funds are available: _____
Supervisor of Student Activity Funds

NOTE: All purchases of supplies, materials, equipment, and contractual services at the school level of ten thousand dollars ($10,000) or greater shall be based on competitive bids and approved by the Board of Education.

Account Breakdown:

907.146 - $6,441.28 Truist Rebate
907.182 - $180.01 Royalties
907.223 - $128.03 Haslam Family Foundation
911.502 - $7000.94 Regular Instruction
912.789 - $38.40 Commissioner's Discretionary
913.949 - $22,298.31 SSO - Foundation
914.000 - $85.00 State of Tennessee
813.886 - $24,000 DECA Club
307.308 - $2,328.03 Unrestricted Gifts/Donations
601.601 - $200.00 General Athletics
TOTAL = $62,700.00

Items for Purchase	Budget Narrative	Status	Carter HS Matching	Knox Co Grant Funds	Total Cost
Total			**$60,010.80**	**$60,010.50**	**$120,021.30**
Directional signage on campus, LED lighting at gym & door vinyl branding	Installation of new lettering / directional signage on the side of the gymnasium (JIM WILLIAMS GYMNASIUM), auditorium (AUDITORIUM, with arrow), and main office (MAIN OFFICE, with arrow, below AUDITORIUM sign). Installation of new window vinyl on windows to cover/replace gold vinyl. Includes installation labor	Quote	$10,217.50	$10,217.50	$20,435.00
New electronic marquee	Replace damaged sign	Quote	$15,850.00	$15,850.00	$31,700.00
Parking lot re-striping	Re-stripe parking lot for clear communication to visitors	Quote	$3,804.30	$3,804.00	$7,608.30
Garage door replacement CTE	Purchase and install 5 620 Series garage doors for CTE Academy Pathway Areas, Overhead Garage with powder coating	Quote	$30,139.00	$30,139.00	$60,278.00
Grant Remainder on Hold	**Hold for contingency on projects**		**$2,689.20**	**$2,689.20**	**$5,378.40**
Balance Remaining			**$0.00**	**$0.00**	**$0.00**

From: Perry Benshoof
To: DOUGLAS SHOVER; CHRIS SIMONS
Cc: HEATHER HENDERLIGHT
Subject: RE: [External]Fw: Spreadsheet shared with you: "Carter HS Knox Co Facilities Grant"
Date: Wednesday, January 7, 2026 8:16:37 AM
Attachments: image002.png
image005.png
image006.png
image007.png
image008.png
image009.png

Doug,
I agree. I approve as well.
Can you send me the revised spreadsheet.

Thanks

Perry Benshoof, CPA, CCFO
Controller
Knox County Finance Department
400 Main Street, Suite 624A
Knoxville, TN 37902-2405
865-215-3118 (Office)
865-335-8219 (Cell)

KNOX COUNTY
TENNESSEE

From: DOUGLAS SHOVER <douglas.shover@knoxschools.org>
Sent: Wednesday, January 7, 2026 7:39 AM
To: CHRIS SIMONS <chris.simons@knoxschools.org>; Perry Benshoof <Perry.Benshoof@knoxcounty.org>
Cc: HEATHER HENDERLIGHT <heather.henderlight@knoxschools.org>
Subject: [External]Fw: Spreadsheet shared with you: "Carter HS Knox Co Facilities Grant"

Chris & Perry -
Based on the email confirmation below from Knox County Schools Maintenance Department, in conjunction with the revised spreadsheet, I recommend that the grant committee approve the proposed projects at Carter High School.

Thank you.
Douglas Shover, Executive Director
Facilities and New Construction Department

KCS | KNOX COUNTY SCHOOLS
Office: 865.594.1825
Mobile: 865.385.2077

Mailing Address
Knox County Schools - Facilities Department
ATTN: Douglas Shover
505 Summer Place - UTT 2nd Floor, Room 281H
Knoxville, Tennessee 37902

From: HEATHER HENDERLIGHT <heather.henderlight@knoxschools.org>
Sent: Tuesday, January 6, 2026 3:14 PM
To: DOUGLAS SHOVER <douglas.shover@knoxschools.org>; CHRIS SIMONS <chris.simons@knoxschools.org>
Subject: FW: Spreadsheet shared with you: "Carter HS Knox Co Facilities Grant"

From: CHRIS TOWE <chris.towe@knoxschools.org>
Sent: Tuesday, January 6, 2026 3:13 PM
To: HEATHER HENDERLIGHT <heather.henderlight@knoxschools.org>
Cc: STEVE KILLIAN <steve.killian@knoxschools.org>; MIKE POLLARD <mike.pollard@knoxschools.org>; JOHN SAMAR <john.samar@knoxschools.org>
Subject: Re: Spreadsheet shared with you: "Carter HS Knox Co Facilities Grant"

Heather,

I've talked with John Samar and he has had some discussions with the folks at Carter High and KCS Maintenance has agreed to cover the cost of necessary power for the garage doors and the new sign.

Thanks,

Chris Towe

Director of Maintenance & Operations

Knox County Schools

865-594-1667

865-594-1352 Fax

http://knoxschools.org/

KNOX COUNTY BOARD OF EDUCATION

This Document is approved by the Knox County Board of Education on the 5th day of March, 2026 as reflected in its minutes, and certified by its Chairperson.

_____

Kristi Kristy, Chair

Date: _____

KNOX COUNTY GOVERNMENT

_____

Glenn Jacobs, Mayor

Date: _____

KNOX COUNTY LAW DEPARTMENT

CONTRACT #: 26-101

APPROVED AS TO LEGAL FORM

_____

Gary Dupler, Deputy Law Director

Date: _____

KNOX COUNTY BOARD OF EDUCATION

Agenda Item Fiscal Note

Description

Approve receipt of $62,700 in grant funds from Knox County Government Facilities Grant for Carter High School, with matching funds of $62,700 from Carter High Internal School Funds.

Cost to Knox County Schools

$62,700

Description and Type of Funding Source

Knox County Government Facilities Grant

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

RLA-18205 **R-26-3-206**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	TERRI COATNEY, KNOX COUNTY SCHOOLS
Department:	KNOX COUNTY SCHOOLS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Letter of Extension to the Grant Agreement with Lawson Family Foundation to extend the Grant Period to April 10, 2026 for Knox County Schools' Project SEARCH Transition-to-Work Program.
(Schools)

Attachments

Resolution
Letter of Extension
Fiscal Note
Original Grant Documentation

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A LETTER OF EXTENSION TO THE GRANT AGREEMENT WITH LAWSON FAMILY FOUNDATION TO EXTEND THE GRANT PERIOD TO APRIL 10, 2026 FOR KNOX COUNTY SCHOOLS' PROJECT SEARCH TRANSITION-TO-WORK PROGRAM.

RESOLUTION: R-26-3-206

REQUESTED BY: SCHOOLS

PREPARED BY: KNOX COUNTY LAW DIRECTOR'S OFFICE

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, by means of Resolution R-25-4-208, the Knox County Commission approved a Grant Agreement with the Lawson Family Foundation for Knox County Schools' Project SEARCH Transition-to-Work Program for the term of February 11, 2025 to February 10, 2026; and

WHEREAS, Knox County Schools and Lawson Family Foundation desire to extend the grant period to April 10, 2026, as further detailed in the attached Letter of Extension; and

WHEREAS, at its regularly scheduled meeting on March 5, 2026, the Knox County Board of Education approved the Letter of Extension with Lawson Family Foundation to extend the grant period to April 10, 2026.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Letter of Extension to the Grant Agreement with Lawson Family Foundation to extend the Grant Period to April 10, 2026 for the Knox County Schools' Project SEARCH Transition-to-Work Program is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Letter of Extension to the Grant Agreement with Lawson Family Foundation to extend the Grant Period to April 10, 2026 for the Knox County Schools' Project SEARCH Transition-to-Work Program shall be executed subject to such amendment or action not affecting the substantive provisions of the document as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Lawson Family Foundation

February 4, 2026

Knox County Schools
400 W. Summit Hill Drive
Knoxville, TN 37902

Subject: Lawson Family Foundation / Project SEARCH Grant Period Extension

To Whom it May Concern:

Thank you for your ongoing stewardship of the Grant Funds awarded by the Lawson Family Foundation (the "Foundation") to Knox County Schools on behalf of Project SEARCH. We understand that circumstances occasionally require additional time to complete planned activities or finalize expenditures.

This letter confirms that the Foundation has approved an extension of the Grant Period until **April 10, 2026**. All other terms and reporting requirements outlined in the Grant Agreement remain unchanged.

Please feel free to contact me at darning@lawsonfamilyfoundation.org if you have any questions or need further clarification. We appreciate your continued partnership and the important work you do on behalf of students!

Capitalized terms used herein shall have the meaning(s) set forth in the Grant Agreement dated February 11, 2025, by and between the Lawson Family Foundation and Knox County Schools.

Sincerely,

David R. Arning, President

Acknowledge and accepted by:

KNOX COUNTY SCHOOLS

_____

By: _____

Its: _____

Date: _____

KNOX COUNTY BOARD OF EDUCATION

This Document is approved by the Knox County Board of Education on the 5th day of March, 2026 as reflected in its minutes, and certified by its Chairperson.

_____

Kristi Kristy, Chair

Date: _____

KNOX COUNTY GOVERNMENT

_____

Glenn Jacobs, Mayor

Date: _____

KNOX COUNTY LAW DEPARTMENT

CONTRACT #: _____

APPROVED AS TO LEGAL FORM

_____

Gary Dupler, Deputy Law Director

Date: _____

Lawson Family Foundation

GRANT AGREEMENT

THIS GRANT AGREEMENT (the "**Agreement**") is made effective as of February 11, 2025 (the "**Effective Date**"), by and between the **LAWSON FAMILY FOUNDATION**, a private foundation (the "**Foundation**"), and **KNOX COUNTY SCHOOLS**, a governmental agency, (the "**Grantee**"), in accordance with the terms and conditions outlined below:

I. **Grant / Grant Funds.** Within thirty (30) days following the Effective Date, the Foundation shall transfer to Grantee the sum of Thirty Thousand Dollars and No/100 ($30,000.00).

II. **Grant Purpose.** Grantee agrees to use the Grant Funds solely for the purpose(s) specified in the grant application dated February 3, 2025 (the "**Application**"). The Foundation reserves the right to require total or partial repayment of Grant Funds used for purposes that deviate from the Grant Purpose without written approval from the Foundation, or for any of the Prohibited Uses listed in Section III hereof. Unless otherwise specified in writing, no goods or services were provided in exchange for the Grant.

III. **Prohibited Uses**. Grantee shall not use any of the Grant Funds: (a) to carry on propaganda or otherwise attempt to influence legislation; (b) to influence the outcome of any specific public election; (c) to carry on, directly or indirectly, any voter registration drive; (d) to award grants to individuals for travel, study, or other similar purposes; (e) to award grants to any other organization(s), unless preapproved by the Foundation in writing; or (f) for any purpose other than religious, charitable, scientific, literary, or educational within the meaning of Section 501(c)(3) of the Code.

IV. **Grant Period.** The twelve (12) month Grant Period shall run from February 11, 2025, to February 10, 2026. Grantee acknowledges that new funding from the Foundation may not be made available to Grantee until after expiration of the Grant Period and submission of a Final Report as described in Section VII hereof.

V. **Termination.** The Foundation reserves the right to terminate this Agreement prior to the end of the Grant Period if Grantee fails to comply with the terms and conditions herein and such failure is not cured within thirty (30) days following receipt of written notice. In such event, any unspent Grant Funds shall be returned immediately to the Foundation.

VI. **Notification Requirements.** Grantee agrees to notify the Foundation in writing immediately in the event of any changes to the: (a) Grant Purpose; (b) Grantee's tax status; or (c) Grantee's chief executive officer.

VII. **Reporting Requirements.** Not later than thirty (30) days following the end of the Grant Period, Grantee shall submit to the Foundation a written report documenting how the Grant Funds were used and measuring the Grant impact based on the metrics specified in the Application (the "**Final Report**").

VIII. **Recordkeeping.** During the Grant Period and for a period of three (3) years thereafter, Grantee shall maintain accurate financial records of the Grant and make such records available to the Foundation upon request.

IX. **Donor Recognition and Publicity.** Grantee agrees to acknowledge the Foundation in public communications or materials related to the Grant. Both the Foundation and Grantee may disclose each other's name and the Grant amount and either may use the other's logo in internal and external communications.

X. **Representations and Warranties.** Grantee represents, covenants, and warrants that: (a) it is a tax-exempt governmental agency or charitable organization under Section 501(c)(3) of the Code, qualified to receive charitable contributions; (b) it is in compliance with all applicable laws, regulations, statutes, and other legal requirements of any governmental, municipal, statutory, or regulatory authority, and Grantee has not received any notice or communication from any governmental authority regarding any actual, alleged, or potential violation of or failure to comply with any Legal Requirements; (c) it shall exercise due care and act

in good faith at all times in performance of its obligations under this Agreement; (d) it possesses all right, power and authority to enter into this Agreement; and (e) it does not discriminate against any individual or entity on the basis of any protected characteristic. DRM

XI. **~~Indemnification.~~** To the extent allowed by Tennessee law, Grantee shall indemnify, defend, and hold harmless the Foundation and its officers, directors, employees, agents, affiliates, successors, and permitted assigns from and against all claims, actions, costs, expenses (including reasonable attorneys' fees), or liabilities arising out of or caused by (a) the negligent act or omission or willful misconduct of Grantee, its affiliates, directors, officers, employees, or agents; (b) Grantee's breach of this Agreement, or any covenants, representations or warranties herein; or (c) any infringement of the intellectual property rights of a third party including patent, copyright, trademark, trade secret, or other proprietary right by Grantee.

XII. **No Assignment or Modifications.** This Agreement and the obligations hereunder may not be assigned by Grantee without prior written approval from the Foundation. This Agreement shall constitute the complete understanding of the parties and shall supersede all prior written or oral agreements or understandings. This Agreement shall not be modified or amended except in writing signed by the authorized representatives of each party.

IN WITNESS WHEREOF, the parties hereto have executed this Grant Agreement as of the Effective Date.

LAWSON FAMILY FOUNDATION

By: David R. Arning
Its: President

KNOX COUNTY SCHOOLS

By: Dr. Jon Rysewyk
Its: Superintendent

Mailing Address:
PO Box 314
Knoxville, TN 37901

KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

Approve letter of extension for spending Lawson Family Foundation Grant for Project SEARCH at Sarah Moore Greene Magnet Academy grant until April 10, 2026.

Cost to Knox County Schools

0

Description and Type of Funding Source

Lawson Family Foundation

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

Lawson Family Foundation

GRANT AGREEMENT

THIS GRANT AGREEMENT (the "**Agreement**") is made effective as of February 11, 2025 (the "**Effective Date**"), by and between the **LAWSON FAMILY FOUNDATION**, a private foundation (the "**Foundation**"), and **KNOX COUNTY SCHOOLS,** a governmental agency, (the "**Grantee**"), in accordance with the terms and conditions outlined below:

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III. **Prohibited Uses**. Grantee shall not use any of the Grant Funds: (a) to carry on propaganda or otherwise attempt to influence legislation; (b) to influence the outcome of any specific public election; (c) to carry on, directly or indirectly, any voter registration drive; (d) to award grants to individuals for travel, study, or other similar purposes; (e) to award grants to any other organization(s), unless preapproved by the Foundation in writing; or (f) for any purpose other than religious, charitable, scientific, literary, or educational within the meaning of Section 501(c)(3) of the Code.

IV. **Grant Period.** The twelve (12) month Grant Period shall run from February 11, 2025, to February 10, 2026. Grantee acknowledges that new funding from the Foundation may not be made available to Grantee until after expiration of the Grant Period and submission of a Final Report as described in Section VII hereof.

V. **Termination.** The Foundation reserves the right to terminate this Agreement prior to the end of the Grant Period if Grantee fails to comply with the terms and conditions herein and such failure is not cured within thirty (30) days following receipt of written notice. In such event, any unspent Grant Funds shall be returned immediately to the Foundation.

VI. **Notification Requirements.** Grantee agrees to notify the Foundation in writing immediately in the event of any changes to the: (a) Grant Purpose; (b) Grantee's tax status; or (c) Grantee's chief executive officer.

VII. **Reporting Requirements.** Not later than thirty (30) days following the end of the Grant Period, Grantee shall submit to the Foundation a written report documenting how the Grant Funds were used and measuring the Grant impact based on the metrics specified in the Application (the "**Final Report**").

VIII. **Recordkeeping.** During the Grant Period and for a period of three (3) years thereafter, Grantee shall maintain accurate financial records of the Grant and make such records available to the Foundation upon request.

IX. **Donor Recognition and Publicity.** Grantee agrees to acknowledge the Foundation in public communications or materials related to the Grant. Both the Foundation and Grantee may disclose each other's name and the Grant amount and either may use the other's logo in internal and external communications.

X. **Representations and Warranties.** Grantee represents, covenants, and warrants that: (a) it is a tax-exempt governmental agency or charitable organization under Section 501(c)(3) of the Code, qualified to receive charitable contributions; (b) it is in compliance with all applicable laws, regulations, statutes, and other legal requirements of any governmental, municipal, statutory, or regulatory authority, and Grantee has not received any notice or communication from any governmental authority regarding any actual, alleged, or potential violation of or failure to comply with any Legal Requirements; (c) it shall exercise due care and act

in good faith at all times in performance of its obligations under this Agreement; (d) it possesses all right, power and authority to enter into this Agreement; and (e) it does not discriminate against any individual or entity on the basis of any protected characteristic. To the extent allowed by Tennessee law, DRA

XI. **Indemnification.** Grantee shall indemnify, defend, and hold harmless the Foundation and its officers, directors, employees, agents, affiliates, successors, and permitted assigns from and against all claims, actions, costs, expenses (including reasonable attorneys' fees), or liabilities arising out of or caused by (a) the negligent act or omission or willful misconduct of Grantee, its affiliates, directors, officers, employees, or agents; (b) Grantee's breach of this Agreement, or any covenants, representations or warranties herein; or (c) any infringement of the intellectual property rights of a third party including patent, copyright, trademark, trade secret, or other proprietary right by Grantee.

XII. **No Assignment or Modifications.** This Agreement and the obligations hereunder may not be assigned by Grantee without prior written approval from the Foundation. This Agreement shall constitute the complete understanding of the parties and shall supersede all prior written or oral agreements or understandings. This Agreement shall not be modified or amended except in writing signed by the authorized representatives of each party.

IN WITNESS WHEREOF, the parties hereto have executed this Grant Agreement as of the Effective Date.

LAWSON FAMILY FOUNDATION

By: David R. Arning
Its: President

KNOX COUNTY SCHOOLS

By: [signature]
Its: Superintendent

Mailing Address:
PO Box 314
Knoxville, TN 37901

RLA-18206 **R-26-3-207**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	TERRI COATNEY, KNOX COUNTY SCHOOLS
Department:	KNOX COUNTY SCHOOLS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, authorizing the acceptance of grant funds and donations for the Knox County Schools as shown on the attached list and in the total amount of $199,765.46.
(Schools)

Attachments

Resolution
Grant/Donation Listing
1-Rocky Hill Elementary School Foundation Donation
2-TDOE Early Literacy Tutoring Grant
3-TDOE Title III Grant
4-Vernier Science Education Inspiration Grant

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, AUTHORIZING THE ACCEPTANCE OF GRANT FUNDS AND DONATIONS FOR THE KNOX COUNTY SCHOOLS AS SHOWN ON THE ATTACHED LIST AND IN THE TOTAL AMOUNT OF $199,765.46.

RESOLUTION: **R-26-3-207**

REQUESTED BY: **SCHOOLS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, the Knox County Board of Education has deemed it in the best interest of the Knox County Schools to apply for and receive public and private grants for the benefit of the Knox County Schools; and

WHEREAS, the Knox County Board of Education is also thankful for the generous donations it receives to help further the important work of the Knox County Schools; and

WHEREAS, the attached list itemizes the (1) grantor/donor; (2) the amount of the grant or donation; (3) the school to which the grant or donation applies; and (4) the purpose of each grant or donation; and

WHEREAS, the Knox County Commission desires to authorize the acceptance of the grant funds and donations; and

WHEREAS, at its regularly scheduled meeting on March 5, 2026, the Knox County Board of Education individually approved the grants and donations listed on the attached document.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby authorizes the acceptance of grant funds and donations for the Knox County Schools as specifically shown on the list of grants and donations attached hereto and incorporated herein by reference and in the total amount of $199,765.46. A copy of the grant or donation notification letter and/or other information provided with each grant or donation is also attached hereto.

BE IT FURTHER RESOLVED, that the Knox County Mayor is hereby authorized to execute any and all contracts or other documents which may be required to signify Knox County's acceptance of the listed grants or donations, subject to the review and approval of the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

KNOX COUNTY SCHOOLS
Grant and Donation Listing
March 2026

No.	Grantor/Donor	School/Program/ Dept Benefitted	Designation	Matching Funds	Personnel Funded	Amount
1	Rocky Hill Elementary School Foundation	Rocky Hill Elementary School	Replacing two basketball courts and installing basketball goals on school's playgrounds	N/A	N/A	$78,613.00
2	Tennessee Department of Education Early Literacy Tutoring Grant	Districtwide	Tutoring Programs	N/A	N/A	$68,500.00
3	Tennessee Department of Education Title III Immigrant Grant	Districtwide	Instructional Supplies and Materials	N/A	N/A	$51,652.46
4	Vernier Science Education Inspiration Grant	Karns High School	Science Program	N/A	N/A	$1,000.00
			TOTAL AMOUNT			**$199,765.46**

KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

There are two basketball courts that are crumbling and need repair. These areas will serve all K-5 students no matter on which playground they play. We obtained three quotes to demo the existing concrete and dispose of the debris, installation of gravel/stone, install form, pour new concrete and cut out expansion joints for both courts. The large court on the 3rd-5th grade playground is 45 X 107 and the small court on the K-2 playground is 58 X 44. Along with the demo and pouring of new concrete, we obtained a quote from Funscapes to install 4 basketball goals, two on each court. They agreed to partner with the concrete installers to set the anchor and oversee the pouring of concrete around the goal base. We would like to have demo begin over Spring Break and anticipate the job being completed before students return to campus.

Cost to Knox County Schools

$78,613.00

Description and Type of Funding Source

RHES Foundation

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

[redacted]

TO: **Doug Shover**
Director of New Facilities and Construction

FROM: Dia Holt, Principal

DATE: 1-29-26

SUBJECT: **Request for Board of Education Approval of a School Funded Project**

I request you recommend this project to the Board of Education for approval. Supporting documentation is attached.

Site	Rocky Hill Elementary
Requested By:	Dia Holt and RHES Foundation Board
Approved By: **(School Principal)**	Dia M. Holt
Phone	(865) 539-7844
Nature of the Project	3 100 basketball courts need replacing on both playgrounds. There will be 4 basketball goals installed (2 on each court). The demo of the existing courts will result in the debris being removed from the site. Concrete was chosen over asphalt due to it lasting longer. Riverbend Concrete with Greg Smothers is who we have selected; Jenscapes will provide the goals.
Cost of the Project	demo and installation of concrete = $66,750 Purchase + installation of basketball goals = $11,863 Total = $78,613.
Funded By ☑ Check box if project is funded in whole or in part by money contained in a school account and submit a completed form BO-107 with this form.	account = foundation 913.949
Cost to Knox County Schools	no cost to KCS

KNOX COUNTY BOARD OF EDUCATION

INTERNAL SCHOOL FUNDS
PURCHASE APPROVAL REQUEST

1) School Rocky Hill Elementary Date 1-29-26

2) Item(s) to be Purchased (Note 1)
1) Demo & Concrete for 2 basketball Courts
2) Basketball Goals
3)
4)
Attach additional page(s) as necessary - See uploaded quote

3) **Purchase Amount (Note 2)** $ $78,613

4) Vendor Riverbend Power Cleaning and Concrete - Greg Smothers

5) Source(s) of Funding (Funds must be currently available)
(Examples: School Coupon Book Sales Receipts, PTO/PTA, Booster Club, General School Funds, etc.)

Source 1	Foundation	Account Number	913.949	Amount $	$78,613
Source 2		Account Number		Amount $	
Source 3		Account Number		Amount $	
Source 4		Account Number		Amount $	
Total (Should Equal Item #3 Above)				$	$78,613

I certify that the purchase(s) requested above will be made in accordance with all applicable provisions of Knox County Board of Education Policy and the Tennessee Internal School Financial Management Manual.

Signed: Jayne Gustafson
Principal: Jim M. Holt
Date: 1-29-26

Funds are available: _____
Supervisor of Student Activity Funds

NOTE: All purchases of supplies, materials, equipment, and contractual services at the school level of ten thousand dollars ($10,000) or greater shall be based on competitive bids and approved by the Board of Education.

BO–107 (5/15)


1873 Lyons Bend Road
Knoxville, TN 37919
(865) 740-1700

12/12/25

Project: ROCKY HILL ELEMENTARY SCHOOL

Scope of Work Includes:

EXTERIOR		
Main Court - remove asphalt and remove debris provide excavation provide disposal of debris	$	17,600.00
New Basketball Court - approx. 4400 SF provide and place form material provide and place 4" stone base provide and place 4" fiber reinforced concrete provide control joints provide pump for concrete placement	$	34,248.00
Area #2 - remove asphalt and remove debris provide excavation provide disposal of debris	$	6,000.00
Area #2 - approx. 2000 SF provide and place form material provide and place 4" stone base provide and place 4" fiber reinforced concrete provide control joint cuts provide pump for concrete placement	$	19,800.00
TOTAL BASE BID	**$**	**77,648.00**

* steel pricing is good for 15 days from the date of this estimate. Should this estimate be accepted after that date, steel pricing is subject to change due to a flucuating market.
* concrete pricing is good for 30 days from the date of this estimate. Should this estimate be accepted after that date, concrete pricing is subject to change due to a flucuating market.

OPTION 1:

ADD Slab winter concrete, if needed, will be additional
ADD Exterior winter concrete, if needed, will be additional

Items included in the above work:

concrete
stone
all labor to perform said work

Items excluded in the above work:

anchor bolts
brick/block material or labor
joint sealant
hauling of spoils
termite pretreatment
job permits

trench drains, footing drains or fabric
extruded curbing
preparation of subgrade
dewatering from underground water sources
bollards
light pole bases
curb and gutter
bonding, GC to provide of required
retaining walls unless otherwise noted
lightweight concrete unless otherwise noted
colored or stained concrete unless otherwise noted
any embeds that are needed to be set within concrete
mandated wage rates, unless otherwise noted
high early concrete unless otherwise noted
other speciality concrete mixes unless otherwise noted
waterproofing treatments
soil/concrete testing
flatness testing
inspection fees
verifying and relocating utilities
flowable fill
form liners
hardeners
spillways
any cold weather concrete additives
any hot weather concrete additives

General Notes: GC to locate building corners and column lines. Should bad soils be encountered additional charges for excavation will be incurred. If excavation is required and hammering or other means are necessary to remove rock, additional charges will apply. Soils from footing excavation to be stored onsite unless otherwise noted. Site grade to be within .1' of subgrade before forming work will commence. SMC will not warranty exterior concrete surfaces from spalding if de-icing products have been used. SMC will not warranty cracks in the slab due to natural curing or shrinkage etc.

Pricing is valid for 30 days from the date of this proposal. If not accepted within 30 days prices are subject to change. All work will be performed in a workmanship like manner. A certificate of insurance will be provided to the GC before work commences.

Estimate Prepared By: *Jason Dunaway*
SMC Commercial LLC
Date: 12/12/25
Office: 865-851-9236
Cell: 865-851-6122
Email: jason@smcknox.net

Proposal Prepared By: *Amy Pyle*
SMC Commercial LLC
Date: 12/12/25
Office: 865-851-9236
Cell: 865-209-8735
Email: amy@smcknox.net

Acceptance of proposal:

By signing below, I accept the proposal submitted by SMC Commercial, Inc. I have initialed the portions of the above bid that are to be included in this acceptance. Work will not commence until a signed agreement has been received by SMC Commercial, Inc. All payments are due 10 days after completion of work unless other contract arrangements have been made. Should payment not be made timely; further action can be taken by Contractor and the Owner will be responsible for any and all fees incurred by the Contractor.

Company Name: _____

Signature: _____

Print Name: _____

Date: _____

VOLUNTEER PAVING & CONCRETE

CONTRACT/PROPOSAL

P.O. Box 1545
Powell, TN 37849
(865) 938-2172 • Fax (865) 947-2789
Email Address: vol_pave8001@yahoo.com

DATE 12-18-2025

Proposal Submitted to: Maci Oconner / Kelie Pickle **Work to be Performed at:**

Name Rocky Hill Elementary
Street 1200 Merrell Rd
City Knoxville State TN Zip
Phone 865-806-1050
Fax

Street
City State
Email tina.holt@knoxschools.org
maci.oconner1@gmail.com
kelie.kpickle@gmail.com

Scope of Work

We hereby propose to furnish the materials and perform the labor necessary for the completion of

1) Main basketball court 45'x107'. Demo the existing asphalt and excavate the additions as needed. Install 2" of base stone. Form and pour 4" of 3500 psi concrete. Broom finish and cut joints 10' on centers.
Demo - $9000.00 Stone, form, pour - $34,300

2) Excavate the 45'x107'. Install 4" of base stone. Pave with 2.5" of hot commercial asphault. Demo - 9000.00 Stone, Asp - $26,075.00

3) Back area. 58'x44'. Excavate as needed. Install 2" stone. Form and Pour 4" of 3500 psi, concrete. Broom finish and cut joints.
Demo - $4000.00 Stone, Concrete $21,160.00

4) Excavate the 58'x44'. Install 4" of base stone. Pave with 2.5" of hot Commercial asphault. Demo $4000.00 Stone, Asp $16,225.00

The above prices do not include removal of unsuitable soil, if any is encountered, rock excavation, seeding disturbed areas, backfill of pavement or concrete, landscaping repairs, or anything else not specified in scope of work.

Volunteer Paving and Concrete cannot be held responsible for germination, acts of God, heavy rainfall, wind, drought, or other conditions that can adversely affect the scope of work.

Volunteer Paving and Concrete cannot,be held responsible for any damage to existing such as asphalt, curbs, sidewalks, driveways, etc if they have to be used for access to the work area or are in the work area.

Volunteer Paving and Concrete will not be responsible for any damages associated with non marked or unlocated existing utilities, water, electrical lines, irrigation systems, or anything else buried beneath work area.

Volunteer Paving and Concrete not responsible for any permits unless listed under Scope of Work.

All material is guaranteed to be as specified, and the above work is to be performed in accordance with the drawings and specifications submitted for above work and completed in a substantial workmanlike manner for the sum of

Dollars ($)

Any alteration or deviation from above specifications involving extra costs will be executed only upon written orders, and will become an extra charge over and above the estimate. All agreements contingent upon strikes, accidents or delays beyond our control. Owner to carry fire, tornado and other necessary insurance upon above work. Volunteer Paving and Concrete will carry appropriate workman's comp and general liability insurance and will provide certificates of insurance if asked.

Respectfully submitted Stanley Lee
Per

Proposal Valid 90 Days

ACCEPTANCE OF PROPOSAL

The above prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above. TERMS: C.O.D. unless prior arrangements have been made. A 1.5% monthly interest charge, plus a $20.00 per month billing charge, is added to all past due balances. If this bill is placed with an attorney for collection, then all expenses and reasonable attorneys fees will be paid by the customer.

The property owner will secure any permits necessary for scope of work.

The property owner is responsible for any unknown buried trash, debris, illegal chemicals, and/or any associated clean up costs, or permits if discovered on site during construction operations.

Date

Signature

Name Printed

PC-107

RHES: BASKETBALL COURT(s) RENOVATION PROJECT

		SMC Concrete		VOL Paving CONCRETE		VOL Paving ASPHALT		Riverbend Concrete (Greg)**		Vendor 5		
Item	Description	Price1	Qty1	Price2	Qty2	Price3	Qty3	Price4	Qty	Price5	Qty5	List
Large Court	Demo & Concrete	51,848.00	1	43,300.00	1	35,075.00	1	42,750.00	1			x
Small Court	Demo & Concrete	25,800.00	1	25,160.00	1	20,225.00	1	24,000.00	1			x
												-
												-
												-
												-
	*Demo is same price with VOL Paving for asphalt and/or concrete											-
	**Can do spring break, weather permitting											-
												-
												-
												-
												-
												-
												-
												-
												-
Subtotal		77,648.00		68,460.00		55,300.00		66,750.00		0.00		
Tax (%)												
Tax		0.00		0.00		0.00		0.00		0.00		
Shipping												
Total		**77,648.00**		**68,460.00**		**55,300.00**		**66,750.00**		**0.00**		

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RHES: BASKETBALL COURT(s) RENOVATION PROJECT

	FunMakers	All American		X-560		ole Pads (either goal				Vendor 5		
Item	Description	Price1	Qty1	Price2	Qty2	Price	Qty4	Price32	Qty33	Price5	Qty5	List
All-American	60" backbaord, 5" post (acrylic bb)	2,349.00	4	2,049.00	4							x
	Installation (includes concrete)	499.00	4	499.00	4							x
	Pin Locks (makes goals fixed height)	50.00	4	50.00	4							x
Optional	*RH Pole Pads*					349.00	4					x
	Initial Set up Fee for Pole Pads (artwork)					75.00	1					-
												-
												-
												-
												-
												-
												-
												-
												-
												-
												-
	Subtotal	11,592.00		10,392.00		1,471.00		0.00		0.00		
	Tax (%)											
	Tax	0.00		0.00		0.00		0.00		0.00		
	Shipping											
	Total	**11,592.00**		**10,392.00**		**1,471.00**		**0.00**		**0.00**		

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KNOX COUNTY BOARD OF EDUCATION

This Document is approved by the Knox County Board of Education on the 5th day of March, 2026 as reflected in its minutes, and certified by its Chairperson.

_____

Kristi Kristy, Chair

Date: _____

KNOX COUNTY GOVERNMENT

_____

Glenn Jacobs, Mayor

Date: _____

KNOX COUNTY LAW DEPARTMENT

CONTRACT #: _____

APPROVED AS TO LEGAL FORM

_____

Gary Dupler, Deputy Law Director

Date: _____

KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

Early Literacy Tutoring Grant from the Tennessee Department of Education

Cost to Knox County Schools

No cost to KCS

Description and Type of Funding Source

Tennessee Department of Education

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

Program Details

Knox County (470) Public District - FY 2026 - TN Tutoring Grant Application - Rev 0 - Early Literacy Tutoring Grant

(a) Qualifying Student Projections. Enter the projected number of qualifying students to be served through tutoring in ELA grades K-2 in the Winter-Spring semester of FY2025-26.

Grade	LEA Number of Qualifying Students
K	86
1	36
2	15
Total	137

(b) Scheduling. Select the scheduling model for tutoring currently utilized. Select **all** that apply.

- [x] Tutoring during an intervention block
- [ ] before/after school;
- [ ] extended day master schedule
- [ ] other*

Other

* **(c) Frequency.** Select the number of tutoring sessions tutoring students receive per week, on average.

- (●) 2 sessions per week
- ( ) 3 sessions per week
- ( ) 4 sessions per week
- ( ) 5 sessions per week

* **(d) Duration** Select the most common duration of tutoring sessions, on average.

- (●) 30-44 minutes per session
- ( ) 45-59 minutes per session
- ( ) 60+ minutes per session

(e) Staffing. Select the staffing that your LEA is currently utilizing for tutoring. Select all that apply.

- [x] Current certified staff
- [x] Current educational assistants
- [x] Retired teachers
- [x] Additional tutoring staff
- [ ] Educational preparation providers/College Students
- [ ] Community partners
- [ ] Volunteers
- [ ] High school students in Teaching as a Profession

* **(f) Content.** Select the best description of tutoring content delivered in tutoring sessions:

- ○ The same HQIM materials used in core content
- ◉ Materials designed to supplement our HQIM core series, created by the same publisher
- ○ Ancillary Materials from a program or publisher different from our HQIM core series (e.g.- TNFSCS)
- ○ Materials my district has created for tutoring

(g) Learning Acceleration Strategies. Which learning acceleration strateg(ies) does your district plan to implement? See the Learning Acceleration Strategies Guidance 2025 for examples. Select ***all*** that apply.

Project Narrative

1. Tutoring Curriculum. Describe the curricular resources/materials that are used in tutoring in order to provide grade-level instruction aligned to district-adopted HQIM. In your response, please include the name of the resource/material, whether it is core curriculum or an ancillary material, and how the resource/material was selected.

Tutoring materials for students in grades K-2 are Benchmark Advance materials pulled from either the core content or intervention ancillary materials. Core content materials are vocabulary practice passages that provide practice with vocabulary, fluency, and comprehension. Students are also provided additional grade-level support with phonics and phonological awareness lessons from Benchmark Advance ancillary intervention materials that are aligned to core content. Materials and pacing were selected and put together by the Academic Supports and Literacy Departments and provided to schools each semester.

2. Instructional Coherence. Describe the district's plan for creating instructional coherence, ensuring that there is alignment between Tier I classroom content and tutoring so that students are working on grade-level, Tier-I aligned content within tutoring.

Knox County Schools has been dedicated to providing instructionally coherent instruction to students in tutoring since the beginning of the tutoring initiative. All tutoring materials come from either the core content resources or the ancillary intervention materials from Benchmark Advance. Suggested pacing of lessons is provided to tutors in order to align with classroom instruction. Tutors at individual schools work with the school-based instructional coach to ensure alignment and pacing are maintained.

Resources

2025-26 Early Literacy Tutoring Technical Application

2025-26 ELTG Recommended Line Items and Account

Budget Overview

Knox County (470) Public District - FY 2026 - TN Tutoring Grant Application - Rev 0 - Early Literacy Tutoring Grant

Filter by Location: All - $68,500.00

Account Number Line Item Number	71100 - Regular Instruction Program	Total
189 - Other Salaries & Wages	68,500.00	68,500.00
Total	68,500.00	68,500.00
	Adjusted Allocation	68,500.00
	Remaining	0.00

KNOX COUNTY BOARD OF EDUCATION

This Document is approved by the Knox County Board of Education on the 5th day of March, 2026 as reflected in its minutes, and certified by its Chairperson.

_____

Kristi Kristy, Chair

Date: _____

KNOX COUNTY GOVERNMENT

_____

Glenn Jacobs, Mayor

Date: _____

KNOX COUNTY LAW DEPARTMENT

CONTRACT #: _____

APPROVED AS TO LEGAL FORM

_____

Gary Dupler, Deputy Law Director

Date: _____

KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

FY26 Title III Immigrant Grant award to serve immigrant students enrolled in Knox County Schools.

Cost to Knox County Schools

No Cost to Knox County Schools

Description and Type of Funding Source

Title III Immigrant Grant

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

Budget Overview

Knox County (470) Public District - FY 2026 - Title III Immigrant - Rev 1 - Title III Immigrant

Indirect Cost Guide	
Total Allocation	$51,652.46
Existing Budget in Categories Not Eligible for Indirect Cost	$0.00
Total Available for Budgeting in Categories Eligible for Indirect Cost and Indirect Cost	$51,652.46
Indirect Cost Rate	3.43%
Max Available Budget in Categories Eligible for Indirect Cost	$49,939.54
Max Indirect Cost	$1,712.92

Filter by Location: All - $51,652.46

Account Number / Line Item Number	71100 - Regular Instruction Program	72130 - Other Student Support	99100 - Transfers Out	Total
429 - Instructional Supplies & Materials	40,695.87			40,695.87
499 - Other Supplies and Materials	0.00	10,137.45		10,137.45
504 - Indirect Cost			819.14	819.14
Total	40,695.87	10,137.45	819.14	51,652.46
			Adjusted Allocation	51,652.46
			Remaining	0.00

KNOX COUNTY BOARD OF EDUCATION

This Document is approved by the Knox County Board of Education on the 5th day of March, 2026 as reflected in its minutes, and certified by its Chairperson.

_____

Kristi Kristy, Chair

Date: _____

KNOX COUNTY GOVERNMENT

_____

Glenn Jacobs, Mayor

Date: _____

KNOX COUNTY LAW DEPARTMENT

CONTRACT #: 26-100

APPROVED AS TO LEGAL FORM

_____

Gary Dupler, Deputy Law Director

Date: 2/20/2026

KNOX COUNTY BOARD OF EDUCATION
Agenda Item Fiscal Note

Description

Approve receipt of Venier Science Education Inspiration Grant for Karns High School/Byington Solway for $1,000 of Venier technology and professional development.

Cost to Knox County Schools

0

Description and Type of Funding Source

Venier Science Education

For Grants: Letter of Approval from the KCS Grants Department must be attached.
AS-105B (6/23)

Subject: Re: 2025 Vernier Inspiration Grant | Joshua, Confirm Your Information Before December 31, 2025
Date: Monday, January 5, 2026 at 5:12:02 PM Eastern Standard Time
From: Kristen Paniagua
To: JOSHUA CAMERON
Attachments: image001.png

CAUTION: External Email. This message originated from outside of the KCS e-mail system.

Hello Joshua,

I hope that your winter break was refreshing and that your new year is off to a good start.

As a recipient of a 2025 Vernier Science Education Inspiration Grant, here are the next steps to follow to claim your award. Each grant consists of up to $1,000 in Vernier technology of your choice, a one-year subscription to Vernier Graphical Analysis® Pro, and three hours of virtual professional development.

- A credit of $1,000 toward Vernier technology is available to you and can be used through December 1, 2026. To redeem your coupon on our online store:
  - Go to www.vernier.com/cart
  - Add the item(s) you wish to order to the cart.
  - Enter the coupon code "VSEInspiration2025" in the field at the bottom of the screen. The coupon code can be applied to one order only.
  - Click "Apply Coupon."
  - Click "Proceed to Checkout."
- Alternatively, you can include the coupon code if you place an order by email, phone, mail or fax. If you have any questions about using this code, please let us know through Chat.
- Within the next two weeks, we will send you a separate email containing the license key and instructions for your one-year subscription to Vernier Graphical Analysis Pro.
- To claim your three hours of professional development:
  - Submit a request using the Professional Development Request Form
  - For the last question "Describe your desired session focus including grade level(s) and subject area(s) and number of participants.", add: "VSE Inspiration Grant Awardee"
  - Hours can be used for multiple shorter sessions throughout the calendar year.
  - These professional development hours can be requested and used through December 1, 2026.

We are excited to hear about your next steps in incorporating data-collection technology in your instruction, and we look forward to hearing more about how the grant is being used in your classroom. If you have any questions, please contact me at your earliest convenience. I'm happy to help.

Congratulations, again!

Subject: 2025 Vernier Inspiration Grant | Joshua, Confirm Your Information Before December 31, 2025
Date: Thursday, December 18, 2025 at 3:12:46 PM Eastern Standard Time
From: Kristen Paniagua
To: JOSHUA CAMERON
CC: Kaitlin Stodola

CAUTION: External Email. This message originated from outside of the KCS e-mail system.

Hello Joshua,

On behalf of everyone at Vernier Science Education, I'm excited to inform you that you have been selected as a recipient of one of our 2025 Inspiration Grants! Each grant consists of up to $1,000 in Vernier technology of your choice, a one-year subscription to Vernier Graphical Analysis® Pro, and three hours of virtual professional development.

On January 5, I'll be sending you the next steps to claim your grant award. In the meantime, we are preparing to announce the names of the grantees and their educational institutions on our website, through a press release, and on social media. Please take a look at the line below and **verify that your information is correct by the end of the day on Wednesday, December 31**. If we don't hear from you by that time, we'll use the name and school name that you've submitted in your application.

- Joshua Cameron, Byington–Solway CTE Center at Karns High School in Knoxville, TN

We appreciate the time you have taken to submit an application for our grant program, and we are excited to hear about your next steps in incorporating data-collection technology in your instruction.

If you have questions, please don't hesitate to reach out. I'm happy to help.

Congratulations, again!

All the best,
Kristen

Kristen Paniagua
Delight Marketing Manager
Trendsetters Program Lead

Vernier Science Education
13979 SW Millikan Way
Beaverton, OR 97005
www.vernier.com

Vernier Software & Technology
is now Vernier Science Education
Find out why

2025 Vernier Science Education Inspiration Grants

Thank you for your interest in Vernier's 2025 Inspiration Grants for STEM educators! This grant program recognizes innovative STEM educators who engage—or seek to engage—their students through creative implementation of Vernier technology. These educators deliver hands-on STEM education that inspires scientific curiosity and fosters STEM literacy.

Vernier Science Education will award 10 Inspiration Grants this year. Each grant will include

- $1,000 in Vernier technology
- A one-year license for our award-winning Vernier Graphical Analysis® Pro app
- Three hours of virtual professional development.

Important Dates & Eligibility

- **Deadline:** Application submissions are due by **11:59 p.m. PST on November 30, 2025.**
- Applicants must be educators who are actively teaching in a middle school, high school, or college educational institution within the United States.
- Grant requests must be endorsed by the building administrator or department head prior to submission.
- The opportunity is only open to educators who have never received a Vernier grant.
- Grantees will be announced on January 6, 2026.

Applications will be reviewed after the submission deadline by a panel of educators and Vernier employees. Grantees will be selected based on various factors, including how they currently or plan to engage their students through creative implementation of Vernier technology and the needs of their school.

Please complete the application below. You may want to consider drafting your answers in a separate document before pasting them here. All fields are required unless noted otherwise.

Section 1: Applicant and Educational Institution Information

First Name *

Joshua

Last Name *

Cameron

Email Address *

joshua.cameron@knoxschools.org

Phone Number *

865-804-2605

Institution Name *

Byington-Solway CTE Center at Karns High

Institution Address *

2700 Byington Solway Road

Is your school located within the United States? *

Dropdown

Yes, my school is located within the United States.

Subject(s) Taught *

- [ ] General Science
- [ ] Biology
- [ ] Chemistry
- [ ] Physics
- [ ] Physical Science
- [ ] Engineering
- [ ] Earth Science
- [ ] Environmental Science
- [ ] Physiology
- [x] Career and Technical Education
- [x] Other: Agriscience, Small Animal, Large Animal, Veterinary Science

Do you currently use Vernier technology in your instruction? (You do not need to be a current Vernier customer to apply.) *

- (●) Yes, I use Vernier technology in my instruction.
- ( ) No, I do not use Vernier technology in my instruction.

Do you plan to involve colleagues in the included professional development sessions? *

- (●) Yes, I plan to involve colleagues in the included professional development sessions.
- ( ) No, I do not plan to involve colleagues in the included professional development sessions.
- ( ) I am not sure if I will involve colleagues in the included professional development sessions.

(Optional) If you've answered yes to involving colleagues in the included professional development, please briefly describe their roles/number of people.

Section 2: Grant Proposal Questions

For each of the following questions, please keep your responses to **~250–300 words**. Be specific and clear—we're interested in the challenges you face, the ideas you're excited about, and how Vernier tools could support your goals. You may wish to prepare your responses in a separate document and copy/paste them when you are ready to submit.

Teaching Environment & Challenges: Tell us more about the educational institution at which you instruct and your classroom or lab setting. What are the current challenges you face in delivering hands-on STEM instruction? *

I teach agricultural and animal science courses at a CTE Center where our students engage in hands-on learning through an outdoor lab and classroom simulations. Our program blends traditional agricultural education with modern STEM instruction, aligning with Tennessee state standards and the National FFA Organization's three-circle model of classroom instruction, supervised agricultural experiences (SAE), and leadership development.

While our students are highly motivated, many come from non-agricultural backgrounds and have limited access to real-world laboratory experiences outside of school. This makes it essential that our classroom provides authentic, inquiry-based learning that connects scientific concepts—such as data collection, animal physiology, and environmental systems—to tangible, real-world applications. However, one of our greatest challenges is a lack of modern, data-driven tools that allow students to perform precise measurements and analyze results like scientists.

Currently, most of our labs rely on visual observation and manual data recording, which limits accuracy and student engagement. We often simulate experiments that could be truly transformative if supported by digital sensors and probeware. For instance, Vernier tools could help students gather real-time temperature, respiration, and heart-rate data in animal physiology units, or collect environmental data from soil and water samples to analyze ecosystem health.

By incorporating more Vernier technology, we could elevate our program from demonstration-based learning to true experimental inquiry—empowering students to see the connection between science, technology, and agriculture while building critical STEM and data-analysis skills that prepare them for college and career pathways in animal science, veterinary medicine, and agricultural engineering.

Technology Plan: What Vernier equipment or technology would you request with the $1,000 grant? Explain how you plan to implement it in your curriculum, labs, or instruction. *

With the $1,000 Vernier grant, I would request LabQuest 3 interfaces along with several of the Vernier sensors—specifically the Temperature Probe, Respiration Rate Sensor, Dissolved Oxygen Sensor, and CO_2 Gas Sensor. Together, these tools would transform our agricultural science labs into authentic, data-driven learning environments that blend biology, chemistry, and environmental science with real-world agriculture.

In our Animal Systems and Veterinary Science courses, students would use the temperature and respiration sensors to investigate thermoregulation, metabolic rate, and animal stress responses during handling labs. The CO_2 Gas Sensor would allow them to measure respiration and fermentation processes—connecting cellular biology to animal nutrition and feed efficiency studies. Meanwhile, the Dissolved Oxygen Sensor would help students monitor water quality in livestock runoff and aquaculture systems, supporting environmental-stewardship and sustainability lessons.

The LabQuest 3 serves as the digital hub for all data collection. Its portability allows students to collect, graph, and analyze data in our outdoor lab and school farm areas in real time, encouraging collaboration and critical thinking. We also plan to pair it with the Conductivity Probe in plant-science and soil-health experiments, giving students a deeper understanding of nutrient balance and environmental impacts.

Integrating Vernier technology into our curriculum aligns perfectly with Tennessee agricultural standards and FFA's experiential-learning model. These tools will elevate our classroom from demonstration-based instruction to inquiry-based experimentation—empowering students to design investigations, interpret authentic data, and connect STEM principles directly to modern animal-science and agri-tech careers.

Broader Relevance & Student Engagement: How does the proposed project tie to real-world STEM issues or socially relevant problems? How will it foster scientific curiosity or STEM literacy among your students? *

This project directly connects classroom learning to real-world STEM issues such as food security, animal welfare, environmental sustainability, and agricultural innovation—all topics central to our community and the global economy. Agriculture today is deeply rooted in science and technology, and understanding data-driven systems is essential for addressing challenges like efficient livestock management, climate change, and resource conservation. By integrating Vernier technology into our animal and environmental science curriculum, students will explore these issues through authentic, measurable investigations rather than abstract concepts.

For example, students can use Vernier sensors to monitor environmental conditions in livestock areas, test water quality affected by agricultural runoff, and analyze respiration and temperature data to study animal physiology. These experiments mirror the work of agricultural scientists, veterinarians, and environmental engineers, helping students see how STEM applies directly to their world and future careers.

This approach will foster scientific curiosity by giving students ownership of their investigations. Instead of simply following lab instructions, they will design questions, collect and analyze real-time data, and interpret results that have visible, meaningful outcomes. Students who may not initially view themselves as "scientists" will develop confidence in using technology, interpreting data, and making evidence-based decisions—all critical skills for STEM literacy.

Ultimately, this project bridges the gap between classroom learning and real-world problem solving, helping students understand that science is not confined to a lab—it's the foundation for the systems that feed, sustain, and innovate our world.

Measuring Impact: How will you assess or measure the impact of using Vernier technology outlined in your proposal? *

The impact of integrating Vernier technology will be assessed through both quantitative and qualitative measures that reflect improvements in student learning, engagement, and technical skill development.

Quantitatively, students will demonstrate mastery by collecting, analyzing, and interpreting accurate data using Vernier sensors and the LabQuest 3 interface. Pre- and post-lab assessments will measure gains in scientific reasoning, data literacy, and understanding of core STEM and agricultural concepts such as respiration rate, temperature regulation, water quality, and environmental impact. Lab reports and digital portfolios will document each student's ability to connect data to real-world agricultural applications.

Qualitatively, I will gather student feedback through reflection journals and surveys to gauge how hands-on data collection influences their confidence and curiosity in science. Observations during labs will help identify growth in collaboration, critical thinking, and problem-solving—skills that are essential for success in animal science and related STEM careers.

Program-level outcomes will include the integration of new, data-driven labs into our curriculum, increased participation in FFA agriscience projects, and improved connections between classroom instruction and supervised agricultural experiences (SAEs). We will also track student enrollment in advanced STEM and agricultural courses as an indicator of long-term impact.

Ultimately, success will be measured not only by test scores or lab accuracy but by the excitement students bring to scientific discovery. Vernier technology will allow them to think and work like real scientists—collecting authentic data, drawing meaningful conclusions, and recognizing how science drives innovation in agriculture and beyond.

By submitting this form, you agree to receive communications about Vernier's products and services. You may unsubscribe from these communications at any time.
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This form was created inside of Vernier Software & Technology.

Google Forms

RLA-18187 **R-26-3-110**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Jill Rosberg, LAW DEPARTMENT
Department:	COUNTY MAYOR
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee confirming the Knox County Mayor's appointment of Cameron Bolin to serve in the seat of an architect on the Knox County Historic Zoning Commission. (Term expires March 1, 2031) *(County Mayor)*

Attachments

Resolution

Bio of Cameron Bolin

Mayor's Appointment Letter

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, CONFIRMING THE KNOX COUNTY MAYOR'S APPOINTMENT OF CAMERON BOLIN TO SERVE IN THE SEAT OF AN ARCHITECT ON THE KNOX COUNTY HISTORIC ZONING COMMISSION. (TERM EXPIRES MARCH 1, 2031)

RESOLUTION: **R-26-3-110**

REQUESTED BY: **COUNTY MAYOR**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Section 5.80.06 of the Knox County Zoning Ordinance (the "Zoning Ordinance") establishes the Knox County Historic Zoning Commission (the "Historic Zoning Commission") and provides for the appointment, terms of office, jurisdiction, and powers of members; and

WHEREAS, pursuant to said Section, the Knox County Mayor shall appoint members to the Historic Zoning Commission, subject to confirmation by the Knox County Commission; and

WHEREAS, the term of George Ewart on the Historic Zoning Commission expires March 1, 2026; and

WHEREAS, the Knox County Mayor has appointed Cameron Bolin to succeed George Ewart who is not eligible for reappointment due to term limits; and

WHEREAS, Cameron Bolin satisfies the requirement that the membership of the Historic Zoning Commission include an architect, if available; and

WHEREAS, the Knox County Commission desires to confirm this appointment.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby confirms the Knox County Mayor's appointment of Cameron Bolin to serve in the seat of an architect on the Knox County Historic Zoning Commission for a five (5) year term expiring March 1, 2031.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

CAMERON S. BOLIN, AIA, LFA, CPHC, LEED GA
BIOGRAPHY

EDUCATION
Master of Architecture | University of Tennessee
2014 | Knoxville, Tennessee
Bachelor of Science, Construction Management
2011 East Tennessee State University | Johnson City, Tennessee

REGISTRATIONS
2017 Registered Architect - State of Tennessee #105169

CREDENTIALS
2022 Living Future Accreditation - ILFI
2022 LEED Green Associate – USGBC
2021 Certified Passive House Consultant - PHIUS (#3419)

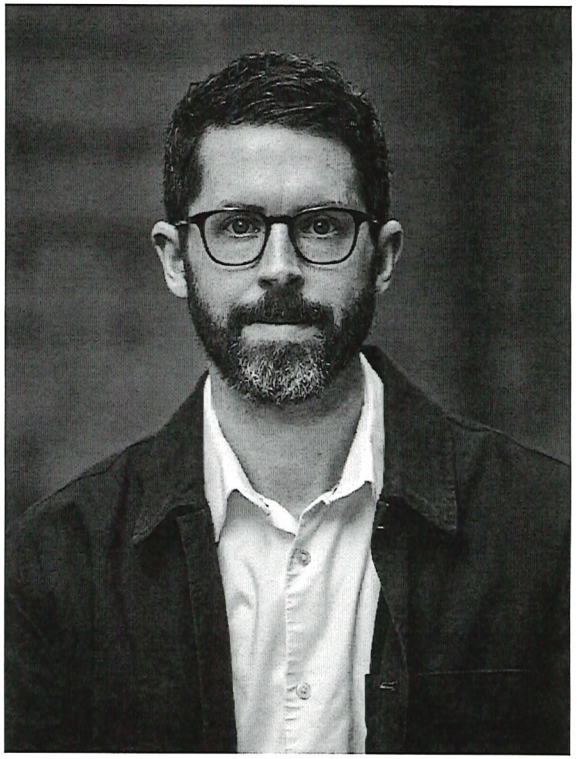
WORK EXPERIENCE
Project Manager, Senior Associate | BarberMcMurry Architects
2026 - present
Project Director, Senior Associate | Sanders Pace Architecture
2024 – 2026, 2014 – 2021
Project Manager, Associate | McCarty Holsaple McCarty
2021 - 2024

INVITED ACADEMIC REVIEWS AND JURIES
Visiting Jury Critic - University of Tennessee
2022 - Current | Invited Critic for Design Studios
Invited Jury Critic - AIA South Carolina
2025 AIA South Carolina Design Awards
Invited Jury Member - DiscoverE Future Cities Program
2025 Tennessee Regional Middle School Competition
Invited Jury Critic - University of Tennessee
2024 - James Rose, Zero Spec | Workshop
Invited Jury Critic - UARK Fay Jones School of Architecture
2024 Ken McCown, Design Studio Final Review
Invited Jury Member - DiscoverE Future Cities Program
2024 Tennessee Regional Middle School Competition

PRESENTATIONS AND LECTURES
Bentonville Workforce Housing | Invited Lecturer
2025 Prof. Andrew Moddrell, KU School of Architecture & Design
UTK Zero Spec | Invited Lecturer
2025 Prof. James Rose, University of Tennessee COAD
Design Excellence: AIA Housing Award Winners | Presenter
2025 AIA National Conference, Boston, MA
Arch 462 Professional Practice - Invited Lecturer
2025 Prof. J. Akerman, University of Tennessee COAD
AIA ETN HOUSING ETN ADU Design Competition | Presenter
2025 PechaKucha Knoxville, TN 54
UTK Zero Spec | Invited Lecturer
2024 Prof. James Rose, University of Tennessee COAD
In Process-Framing a Sustainable Design Practice | Presenter
2024 AIA TN State Conference
Taking Stock | Systemic Interventions of Reuse | Presenter
PechaKucha Knoxville, TN 51 – Knox Heritage 50th Anniversary
Taking Stock | Systemic Interventions of Reuse | Selected Short Form
2024 Congress for New Urbanism Conference - Cincinnati, OH
Arch 5026 Design Studio | Invited Lecturer
2024 Prof K. McCown | UARK Fay Jones School of Arch. and Design
Regional Resiliency Roundtable | Invited Panelist
2024 AIA East Tennessee Committee on the Environment
Residential and Commercial 2024 Buildings Panelist
2024 TN Volunteer Emission Reduction Strategy

SERVICE TO THE PROFESSION
2025 President, AIA East Tennessee
2024 President-Elect, AIA East Tennessee
2024 Conference on Architecture Committee, AIA Tennessee
2024 Design Awards Evaluation Task Force, AIA Tennessee
2024 Founder, Regional Resilience Sub-Committee, AIA East Tennessee
2024-ongoing Tennessee AIA Leadership Network
2023-ongoing Founder & Chair, AIA ETN Committee on the Environment
2022-ongoing Design Awards Committee, AIA East Tennessee
2021-ongoing Board of Directors, AIA East Tennessee
2018-2020 Volunteer for AIA ETN Architecture Week events
2017 Architecture History Tour Organizer, AIA ETN Architecture Week
2015-2017 Volunteer, Design Slam Knoxville, AIA East Tennessee
2014-ongoing Member of AIA East Tennessee

SERVICE TO THE COMMUNITY
City of Knoxville Design Review Board | AIA ETN Representative
2021 - current City of Knoxville, Tennessee
Insight for Revit Total Carbon Workshop | Founder / Organizer
2025 AIA ETN Committee on the Environment
Housing ETN - Single Stair Housing Design Competition | Organizer
2025 AIA East Tennessee - Knoxville, Tennessee
Middle School Career Fair | AIA Representative
2024 Vine Middle Magnet Middle School Knoxville, Tennessee
Housing ETN - ADU Design Competition | Founder / Organizer
2024 AIA East Tennessee - Knoxville, Tennessee
City of Knoxville Facade Improvement Design Review Committee
2021 - 2023 City of Knoxville, Tennessee



Cameron Bolin elevates the potential of design through a practice of empathy, professional service, and community impact. Cameron's leadership in sustainability, housing reform, and mentorship inspires a collective action to advance the profession of architecture.

CAMERON S. BOLIN, AIA, LFA, CPHC, LEED GA
SUMMARY STATEMENT

OFFICE OF COUNTY MAYOR GLENN JACOBS

February 20, 2026

David Buuck
Knox County Law Director
400 Main Street, Suite 612
Knoxville, TN 37902

RE: Appointment to the Historic Zoning Commission

Dear Mr. Buuck,

I would like to appoint Cameron S. Bolin to the Historic Zoning Commission to serve his first five-year term expiring on March 1, 2031. Please see the attached resume.

Please let me know if you have any questions.

Sincerely,

Glenn Jacobs
Knox County Mayor

cc: Files
Cameron S. Bolin

RLA-18181 **R-26-3-111**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Jill Rosberg, LAW DEPARTMENT
Department:	COUNTY MAYOR
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting the resignation of Nancy Barger (serving in the seat of a member of the Local Planning Commission) from the Knox County Historic Zoning Commission and confirming the Knox County Mayor's appointment of Matthew Anderson to complete the unfulfilled term of Ms. Barger on the Historic Zoning Commission. (Term expires March 1, 2030) *(County Mayor)*

Attachments

Resolution

Resignation of Nancy Barger

Resume - Matthew Anderson

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, ACCEPTING THE RESIGNATION OF NANCY BARGER (SERVING IN THE SEAT OF A MEMBER OF THE LOCAL PLANNING COMMISSION) FROM THE KNOX COUNTY HISTORIC ZONING COMMISSION AND CONFIRMING THE KNOX COUNTY MAYOR'S APPOINTMENT OF MATTHEW ANDERSON TO COMPLETE THE UNFULFILLED TERM OF MS. BARGER ON THE HISTORIC ZONING COMMISSION. (TERM EXPIRES MARCH 1, 2030)

RESOLUTION: **R-26-3-111**

REQUESTED BY: **COUNTY MAYOR**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Section 5.80.06 of the Knox County Zoning Ordinance (the "Zoning Ordinance") establishes the Knox County Historic Zoning Commission (the "Historic Zoning Commission") and provides for the appointment, terms of office, jurisdiction, and powers of members; and

WHEREAS, pursuant to said Section, the Knox County Mayor shall appoint members to the Historic Zoning Commission, subject to confirmation by the Knox County Commission; and

WHEREAS, Nancy Barger recently resigned from the Historic Zoning Commission, leaving an unfulfilled term expiring March 1, 2030 in the seat of a member of the local planning commission; and

WHEREAS, the Knox County Mayor has appointed Matthew Anderson to complete the unfulfilled term of Ms. Barger; and

WHEREAS, Matthew Anderson satisfies the requirement that the membership of the Historic Zoning Commission consist of a person who is a member of the local planning commission at the time of such person's appointment; and

WHEREAS, the Knox County Commission desires to confirm this appointment.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby accepts the resignation of Nancy Barger from the Knox County Historic Zoning Commission.

BE IT FURTHER RESOLVED, that the Commission hereby confirms the Knox County Mayor's appointment of Matthew Anderson to serve in the seat of a person who is a member of the local planning commission and complete the unfulfilled term of Ms. Barger on the Historic Zoning Commission with such term to expire on March 1, 2030.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor **Date**

Vetoed:_____

County Mayor **Date**

Planning
KNOXVILLE | KNOX COUNTY

Memorandum

FROM: Knoxville-Knox County Planning Staff
DATE: January 30, 2025
SUBJECT: Knox County HZC, Commissioner resignation

Per the attached email, Nancy Barger resigned from the Knox County Historic Zoning Commission on January 28, 2026. There is now a vacant seat to be filled on the five-member Commission.

From: Nancy Barger <nancy@bargerconcepts.com>
Sent: Wednesday, January 28, 2026 6:38 AM
To: Amy Brooks <amy.brooks@knoxplanning.org>; Dallas DeArmond <dallas.dearmond@knoxplanning.org>
Subject: HZC

Good morning! Unfortunately due to my work schedule and being on-air until 10am daily, I cannot attend HZC meetings and therefore need to resign my position. I am so sorry that I did not check the times of the meetings prior to accepting the nomination.

--
Nancy Barger
Barger Concepts, LLC

02-06-26A09:51 RCVD

OFFICE OF COUNTY MAYOR GLENN JACOBS

February 3, 2026

David Buuck
Knox County Law Director
400 W. Main Street, Suite 612
Knoxville, TN 37902

RE: Historic Zoning Commission

Dear Director Buuck,

Nancy Barger has resigned from her position on the Historic Zoning Commission effective January 28, 2026.

I would like to appoint Mr. Matthew Anderson, a member of local Planning Commission, to serve the remainder of her term that expires March 1, 2030. His resume is attached.

Sincerely,

Glenn Jacobs
Knox County Mayor

cc: Files
Mr. Matthew Anderson

Matthew T. Anderson matt@ywlawfirm.com
2004 Heather Glen Road 865-548-5176
Knoxville, TN 37919

SUMMARY

Attorney licensed in Tennessee, Georgia, and Kentucky with a diverse business background experienced in navigating complex corporate and real estate issues with a focus on finding practical solutions.

WORK EXPERIENCE

Young, Williams & Theiss, PC and **LeConte Title, LLC**, Knoxville, Tennessee
Attorney and Vice President of LeConte Title, May 2015-current

- Practice primarily focused in real estate, corporate, and transactional law focusing on solving complex legal issues.
- Act as title agent for LeConte Title in East Tennessee, Kentucky, and Georgia, for approximately one thousand closings annually.
- Manage LeConte's staff of closers and processors and assist with strategic growth of business operations.
- Assist real estate developers, investors, and home builders with development projects, acquisitions, risk assessment, due diligence, and title related issues.

Holrob Commercial Realty, LLC, Knoxville, Tennessee
Broker, March 2006-August 2012, July 2014-May 2015

- Lease and sell commercial real estate.
- Assist clients with development feasibility including projected rental rates, estimating hard and soft costs, and site selection.

Advance America Cash Advance Centers, Inc., Spartanburg, South Carolina
Associate Corporate Counsel, September 2012-July 2014

EDUCATION

University of Tennessee College of Law, Knoxville, Tennessee
Juris Doctor *cum laude*, May 2012

University of Tennessee, Knoxville, Tennessee
Bachelor of Science in Business Studies, *cum laude*, December 2005

COMMUNITY

Leadership Knoxville, Knoxville, Tennessee
Introduction Knoxville, Winter 2017, Introduction Knoxville Planning Committee, 2018-2020

Friends of Great Smoky Mountains, Kodak, Tennessee
Evergreen Ball Fundraising Committee, 2019-2023

Matthew Anderson (Matt) is a Knoxville native that received both his undergraduate and law degrees from the University of Tennessee. Matt has always been passionate about real estate and community development. He began his career working for a Knoxville based commercial real estate development and brokerage firm in 2006, where he quickly learned that successfully developing and managing real estate is a balancing act and the consequences of a poorly planned development are far reaching.

Matt has been with the Knoxville law firm Young, Williams & Theiss, PC, and its affiliate, LeConte Title, LLC, since 2015. Matt primarily focuses his law practice on real estate and transactional law. As Vice President of LeConte Title, Matt oversees daily operations of the title company and acts as the company's primary closing agent and title attorney. Through his practice, Matt has helped home builders, realtors, and consumers close approximately 1,000 transactions during each of the last several years in East Tennessee.

Matt believes Knoxville's natural beauty, resources, location, and numerous other attributes make it the ideal place to call home. This sentiment has been echoed by a multitude of home buyers migrating to Knoxville from other areas that Matt has encountered over the last several years and highlights the need for development and growth in Knox County to be simultaneously responsible, sustainable, and effective.

Matt's civic engagement includes supporting the Friends of the Great Smoky Mountains in various roles, including serving on the Friends' Evergreen Ball Steering Committee for the past several years. In addition, Matt served on the Leadership Knoxville Introduction Knoxville Planning Committee from 2018-2020 after completing Introduction Knoxville himself in Winter 2017.

Matt is married to Andi, a Tax Officer at Pugh CPAs who is also of counsel at Young, Williams & Theiss, PC. Matt and Andi welcomed their first child in October 2022.

RLA-18137 **R-26-3-301**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Allison Rogers, SHERIFF
Department:	SHERIFF
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the Addendum to the Memorandum of Understanding between Knoxville Leadership Foundation and the Knox County Sheriff's Office outlining the financial commitment of $135,000.00 from July 1, 2025 to December 31, 2027 for facility utilization and access to inmate clientele at the Roger D. Wilson Detention Facility.
(Sheriff)

Attachments

Resolution

Addendum to KLF MOU

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING THE ADDENDUM TO THE MEMORANDUM OF UNDERSTANDING BETWEEN KNOXVILLE LEADERSHIP FOUNDATION AND THE KNOX COUNTY SHERIFF'S OFFICE OUTLINING THE FINANCIAL COMMITMENT OF $135,000.00 FROM JULY 1, 2025 TO DECEMBER 31, 2027 FOR FACILITY UTILIZATION AND ACCESS TO INMATE CLIENTELE AT THE ROGER D. WILSON DETENTION FACILITY.

RESOLUTION: **R-26-3-301**

REQUESTED BY: **SHERIFF**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, by means of Resolution R-24-3-304, the Knox County Commission approved an agreement between Knoxville Leadership Foundation ("KLF") and the Knox County Sheriff's Office to support the KLF's Growth Opportunities program ("KLF-GO") and the rehabilitation of adult offenders by providing office space, referrals, and access to inmates currently incarcerated at the Roger D. Wilson Detention Facility; and

WHEREAS, Knoxville Leadership Foundation and the Knox County Sheriff's Office desire to enter into an addendum to outline KLF's financial commitment of $135,000.00 from July 1, 2025 to December 31, 2027 for continued facility utilization and access to inmate clientele at the Roger D. Wilson Detention Facility; and

WHEREAS, the proposed Addendum to Memorandum of Understanding formalizes the agreement between the Knox County Sheriff's Office and KLF with respect to the KLF-GO program; and

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Addendum to Memorandum of Understanding with Knoxville Leadership Foundation outlining KLF's financial commitment from July 1, 2025 to December 31, 2027 for facility utilization and access to inmate clientele at the Roger D. Wilson Detention Facility in connection with the KLF Growth Opportunities program is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Addendum to Memorandum of Understanding with Knoxville Leadership Foundation outlining KLF's financial commitment from July 1, 2025 to December 31, 2027 for facility utilization and access to inmate clientele at the Roger D. Wilson Detention Facility in connection with the KLF Growth Opportunities program shall be executed subject to such amendment or action not affecting the substantive provisions of the agreement as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor **Date**

Vetoed:_____

County Mayor **Date**

ADDENDUM TO MEMORANDUM OF UNDERSTANDING

Between

KNOXVILLE LEADERSHIP FOUNDATION
318 North Gay Street, #210
Knoxville, TN 37919

and

KNOX COUNTY SHERIFF'S OFFICE
ROGER D. WILSON DETENTION FACILITY
5001 Maloneyville Road
Knoxville, TN 37918

This Addendum modifies and supplements the Memorandum of Understanding of July 1, 2025 through December 31, 2028, Subaward Agreement of February 1, 2023 through July 31, 2025 and the Memorandum of Understanding of March 1, 2025 through December 31, 2028 between the Knoxville Leadership Foundation (KLF) and the Knox County Sheriff's Office – Roger D. Wilson Detention Facility (KCSO) in connection with the KLF Growth Opportunities (KLF-GO) Project.

Purpose of Addendum
The purpose of this Addendum is to outline the financial commitment between the parties to ensure a clear understanding of contractual obligations during the grant period.

Financial Agreement

1. **Contract Amount:** KLF agrees to provide the Rogert D. Wilson Detention Facility with a total of One Hundred Thirty-Five Thousand Dollars ($135,000.00) over the period July 1, 2025 – December 31, 2027, distributed as follows:
    - Fifteen Thousand Dollars ($15,000.00) during the period of July 1, 2025 – December 31, 2025;
    - Sixty Thousand Dollars ($60,000.00) during the period of January 1, 2026 – December 31, 2026;
    - Sixty Thousand Dollars ($60,000.00) during the period of January 1, 2027 – December 31, 2027.
2. **Payment Terms:**
    - Payments will be disbursed in accordance with the services outlined in the signed MOU. Invoices shall be submitted at least quarterly.
    - KCSO will submit invoices to KLF for services rendered under the scope of work described in the MOU.
    - KLF will remit payments within thirty (30) days of receipt of invoice, subject to compliance with grant requirements.
3. **Use of Funds:** Funds shall be used solely to support KCSO's responsibilities under the MOU, including referrals, pre-release introductions, facilities usage, training of KLF staff, and related services provided to KLF staff and participants.

4. **SAM.gov Registration:** KCSO agrees to maintain an active and current registration in the System for Award Management (SAM.gov) throughout the entire contract period. A copy of the active SAM.gov registration must be attached with the signed Addendum. Failure to maintain active registration may result in suspension of payments until compliance is restored.

Duration
This Addendum remains in effect for the duration of the grant period, July 1, 2025 – December 31, 2028, unless modified in writing and signed by both parties.

All Other Terms
All other terms and conditions of the Memorandum of Understanding remain unchained and in full effect.

AGREED AND ACCEPTED:

KNOXVILLE LEADERSHIP FOUNDATION
Christopher L. Martin, President

_____ _____
Signature Date

KNOX COUNTY SHERIFF'S OFFICE
ROGER D. WILSON DETENTION FACILITY

_____
Name and Title of Signer

_____ _____
Signature Date

KNOX COUNTY, TENNESSEE

_____ _____
GLENN JACOBS, KNOX COUNTY MAYOR Date

Contract No.: 26-020
APPROVED AS TO LEGAL FORM:

_____ _____
DAVID S. WIGLER, SENIOR DEPUTY Date
KNOX COUNTY LAW DIRECTOR

RLA-18138 **R-26-3-302**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Allison Rogers, SHERIFF
Department:	SHERIFF
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the FY2026 Homeland Security Task Force Overtime Cost Reimbursement Agreement not to exceed $30,000.00 per investigation in overtime expenses incurred by the Knox County Sheriff's Office.
(Sheriff)

Attachments

Resolution
FY26 Homeland Security Overtime Agreement

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING THE FY 2026 HOMELAND SECURITY TASK FORCE OVERTIME COST REIMBURSEMENT AGREEMENT NOT TO EXCEED $30,000.00 PER INVESTIGATION IN OVERTIME EXPENSES INCURRED BY THE KNOX COUNTY SHERIFF'S OFFICE.

RESOLUTION: R-26-3-302

REQUESTED BY: SHERIFF

PREPARED BY: KNOX COUNTY LAW DIRECTOR'S OFFICE

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, the Knox County Sheriff's Office desires to enter into an agreement with the Federal Bureau of Investigation supporting the Homeland Security Task Force Program; and

WHEREAS, the proposed FY 2026 Homeland Security Task Force Strategic Initiatives/Local Overtime Cost Reimbursement Agreement provides reimbursement of overtime expenses incurred by the Knox County Sheriff's Office in an amount not to exceed $30,000.00 per investigation, as further detailed in the attached agreement; and

WHEREAS, the FY 2026 Homeland Security Task Force Strategic Initiatives/Local Overtime Cost Reimbursement Agreement sets forth the terms and conditions under which the Knox County Sheriff's Office may receive reimbursement of overtime expenses in assisting with Homeland Security Task Force investigations.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The FY 2026 Homeland Security Task Force Strategic Initiatives/Local Overtime Cost Reimbursement Agreement with the Federal Bureau of Investigation for the reimbursement of not to exceed $30,000.00 per investigation in overtime expenses incurred by the Knox County Sheriff's Office is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the FY 2026 Homeland Security Task Force Strategic Initiatives/Local Overtime Cost Reimbursement Agreement with the Federal Bureau of Investigation shall be executed subject to such amendment or action not affecting the substantive provisions of the agreement as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

FY 2026 Homeland Security Task Force
Strategic Initiatives/Local Overtime
Cost Reimbursement Agreement

This Agreement is between the below-named State/Local Law Enforcement Organization and Sponsoring Federal Agency directly supporting the Homeland Security Task Force (HSTF) Program. Pursuant to the Congressional appropriations, the Federal Bureau of Investigation (FBI) receives authority to pay overtime for police officers assigned to the formal HSTF, who are incurring necessary expenses for detection, investigation, and prosecution of crimes against the United States.

It is hereby agreed between the Federal Bureau of Investigation , and

State/Local Agency: Knox County Sheriff's Office (KCSO)
Street Address: 400 Main Street, Suite L-165
City, State, Zip code, Telephone: Knoxville, TN 37902, 865-215-2444
Financial Contact (POC): Candace Brandt
Financial Contact Telephone/email: 865-215-4508
Tax EIN: 62-6007979

1. Commencing upon execution of this Agreement, the FBI will, subject to the availability of required funding, reimburse KCSO for overtime payments made to officers assigned to/or and working HSTF Investigations or Strategic Initiatives.

2. Reimbursement requests must be submitted to FBI via KCSO within thirty (30) days of the close of the month in which the overtime was worked. [For example, if overtime is incurred in December, the Reimbursement Request for the December overtime should be submitted no later than January 30th. The reimbursement request must be approved by the appropriate Supervisor (or designee) at FBI prior to reimbursement.

3. Overtime reimbursement payments from the sponsoring agency will be made via electronic funds transfer (EFT) directly to KCSO . To facilitate EFT, KCSO shall establish an account online in the System for Award Management (SAM) at www.SAM.gov. A verification of banking information is required on an annual basis to keep payment information current. For additional information regarding procedures related to reimbursements, contact your agency's Regional Coordinator or Program Analyst.

4. Overtime reimbursements will be calculated at the usual rate for which the individual officer's time would be compensated in the absence of this agreement. However, overtime payments, including all other, non-HSTF Federal sources (such as Safe Streets, HIDTA, IRS, FEMA, etc.) may not, on an annual/fiscal year basis exceed 25% of the current approved Federal salary rate in effect at the time the overtime is performed. The Federal fiscal year runs from October 1st through September 30th. The pay cap amount changes annually and State/Local entities should reference the current fiscal year amount on their

HSTF Case and Participant Form. The State/Local Organization is responsible for ensuring the annual payment is not exceeded.

5. The KCSO must complete annually the HSTF Case and Participant Request Form, listing the law enforcement officers assigned full-time/part-time to the HSTF and as such are entitled to overtime reimbursement. Based on the needs of the HSTF, this number may change periodically, upward or downward, as approved in advance.

6. The request for reimbursement shall include an invoice number, invoice date, the officer's name, overtime compensation rate, number of reimbursable hours for overtime claimed, and the dates of those hours for each officer for whom reimbursement is sought. This information must be submitted to the KCSO for reimbursement to be paid.

7. Requests for reimbursement shall be submitted monthly, and all requests shall be received no later than December 31st of the next fiscal year for which the reimbursement applies. For example, reimbursements for the fiscal year ending September 30, 2026, shall be received monthly and not later than December 31, 2026. The FBI is not obligated to reimburse any requests received untimely and not in accordance herewith.

8. If an Agreement does not have a bill submitted within ninety (90) days of the Agreement funding date, or within sixty (60) days of when the last bill was submitted, funds will be de-obligated. Furthermore, if a State/Local Law Enforcement Organization determines there will be no additional work performed under a particular Agreement, a funding change notification email should be sent to the Regional Coordinator/Program Analyst, identifying the amount to be de-obligated as soon as possible.

9. Only sworn law enforcement officers are eligible for reimbursement in this program. Officers who are not deputized shall possess no Law Enforcement authority other than that conferred by virtue of their position as a commissioned officer of their parent Agency.

10. HSTF will only reimburse an actual dollar ($) amount paid to the officer for overtime worked, any additional benefit or administrative fees (including compensation time) will NOT be reimbursed.

11. The State/Local Organization will comply with Title VI of the Civil Rights Act of 1964 and requirements applicable to HSTF Agreements pursuant to the regulations of the Department of Justice (see, 28C.F.R. Part 42, Subparts C and G; 28C.R.R.50.3 (1993)) relating to discrimination of the grounds of race, color, sex, age, national origin, or handicap.

12. The Agreement is effective upon signatures of all parties and will remain in effect for the duration of KCSO's participation on the HSTF, contingent upon approval of necessary funding, and unless terminated in accordance with the provisions herein. This Agreement may be modified at any time by written consent of the parties or based on changing business operations and practices of the HSTF. It may be terminated at any time upon mutual consent of the parties, or unilaterally upon written notice from the terminating party to the other party at least 30 days prior to the termination date.

Signatories:

Signature of State/Local Agency	Signature of Sponsoring Federal Agency
Print Name	Thayne Larson Print Name
Title	Supervisory Special Agent Title
State/Local Agency	Federal Bureau of Investigation Sponsoring Federal Agency
Date	02/06/2026 Date

Signature of Sponsoring Agency Regional Coordinator

Print Name

Date

KNOX COUNTY, TENNESSEE

GLENN JACOBS Date
KNOX COUNTY MAYOR

Contract No.: 26-121

APPROVED AS TO LEGAL FORM

2/25/26

Knox County Law Director Date

FY 2026 Homeland Security Task Force Strategic Initiatives/Local Overtime Case and Officer Participant Form

State/Local Organization: Knox County Sheriff's Office

Financial Contact (POC): Candace Brandl

Financial Contact Email Address: candace.brandl@knoxsheriff.org **Telephone #** (865) 215-4508

Sponsoring Federal Agency: Federal Bureau of Investigation, Nashville Field Office

Total Dollar Amount Requested: $ 7,500.00
(auto-populates from Total below)

The Law Enforcement Officers listed below will assist with the below identified HSTF Investigation(s) or Strategic Initiative(s). Any modification of the list of Law Enforcement Officers must be made in writing, made a part of the Cost Reimbursable Agreement (CRA), and forwarded to the HSTF Regional Coordinator/Program Analyst.

The annual pay cap per officer receiving overtime payments from ALL federal entities for Fiscal Year 2026 is $22,155.25 and cannot be exceeded for any reason.

No individual agency may exceed $30,000 per HSTF investigation, per fiscal year. In addition, the cumulative total of overtime funding spent on a single HSTF investigation may not exceed $60,000 per fiscal year. To exceed these funding limits, a Cap Waiver Request Form must be submitted to the Regional Coordinator/Program Analyst. Cap waivers must be submitted and approved in advance. Approval is subject to availability of funds.

HSTF Case Number	Total Requested per Case	Date Requested	Federal Agency Approver	Federal Agency Approver Date
SI-GANG-NAS-13	$ 7,500.00	01/29/2026	Thayne Larson	1/30/2026
Total:	$ 7,500.00			

RLA-18135 **R-26-3-303**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Allison Rogers, SHERIFF
Department:	SHERIFF
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting a TJX Law Enforcement Grant in the amount of $5,000.00 for the purchase of surveillance equipment.
(Sheriff)

Attachments

Resolution

TJX grant

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, ACCEPTING A TJX LAW ENFORCEMENT GRANT IN THE AMOUNT OF $5,000.00 FOR THE PURCHASE OF SURVEILLANCE EQUIPMENT.

RESOLUTION: **R-26-3-303**

REQUESTED BY: **SHERIFF**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, the Knox County Sheriff's Office has been awarded a TJX Law Enforcement Grant to purchase surveillance equipment; and

WHEREAS, the Knox County Sheriff's Office desires to receive such award in the amount of $5,000.00.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby approves and authorizes the acceptance of a TJX Law Enforcement Grant in the amount of $5,000.00 for the purchase of surveillance equipment.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

TJX THE TJX COMPANIES, INC.
TJ maxx Marshalls HomeGoods marmaxx SIERRA

PO Box 9133
Framingham, MA 01701

REMITTANCE ADVICE
CHECK NO: 2612104
Page 1 of 1

DATE: 01/13/2026

SUPPLIER NO: 405081

INVOICE NO	DATE	PURCHASE ORDER NO	DESCRIPTION	GROSS AMT	DISCOUNT	NET AMT
G-0704	01/07/2026		TJX LP GRANT RECIPIENT - G-070	5,000.00		5,000.00
			TOTAL	5,000.00		5,000.00

THIS IS WATERMARKED PAPER - DO NOT ACCEPT WITHOUT NOTING WATERMARK - HOLD TO LIGHT TO VERIFY WATERMARK

CHECK NO: 2612104

53-292
113

The Bank of New York Mellon
Everett, MA 02149

TJX THE TJX COMPANIES, INC.
TJ maxx Marshalls HomeGoods marmaxx SIERRA

DATE: 01/13/2026

CHECK AMOUNT: *******$5,000.00

PAY: ******5,000*****DOLLARS****00*****CENTS

TO THE ORDER OF
KNOX COUNTY SHERIFFS OFFICE
400 W MAIN ST
KNOXVILLE TN 37902

AUTHORIZED SIGNATURE
VOID AFTER 180 DAYS

⑈2612104⑈ ⑆011302920⑆ 023817⑈

Outlook

TJX Grant Application Accepted

From Elizabeth Cruz <elizabeth_cruz@tjx.com>
Date Wed 2/11/2026 8:15 AM
To Hugh Holt JR <Hugh.Holt@knoxsheriff.org>; Allison Rogers <Allison.Rogers@knoxsheriff.org>; elizabeth_cruz@tjx.com <elizabeth_cruz@tjx.com>

1 attachment (364 KB)
ACH Form_Suppliers.pdf;

You don't often get email from elizabeth_cruz@tjx.com. Learn why this is important

Dear Hugh Holt,

Based upon the contents of your application submission, we are pleased to inform you that TJX Law Enforcement Grant Program has awarded $5,000 to Knox County Sheriff's Office for The equipment will be utilized for surveillance and evidentiary purposes..

To complete the grant process, we will process a check for the award grant and within a few weeks we will FedEx it to arrive at your Agency. Lastly, please remember that TJX does not want any publicity or media coverage for these grants and would appreciate not being mentioned in any releases.
We look forward to hearing how these funds helped to support the good work your organization is already doing in Knox County
Congratulations!

Sincerely,
TJX Executive LE Grant Committee

RLA-18139 **R-26-3-304**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Allison Rogers, SHERIFF
Department:	SHERIFF
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving Amendment One to a Contract with the Tennessee Department of Human Services for the provision of Title IV-D Child Support Enforcement Services in the amount not to exceed $281,108.05 with a local match requirement of $144,813.24 for the period beginning on July 01, 2026 and ending on June 30, 2027.
(Sheriff)

Attachments

Resolution

Dept of Human Services Amendment One

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING AMENDMENT ONE TO A CONTRACT WITH THE TENNESSEE DEPARTMENT OF HUMAN SERVICES FOR THE PROVISION OF TITLE IV-D CHILD SUPPORT ENFORCEMENT SERVICES IN THE AMOUNT NOT TO EXCEED $281,108.05 WITH A LOCAL MATCH REQUIREMENT OF $144,813.24 FOR THE PERIOD BEGINNING ON JULY 1, 2026 AND ENDING ON JUNE 30, 2027.

RESOLUTION: **R-26-3-304**

REQUESTED BY: **SHERIFF**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, by means of Resolution R-25-4-301, the Knox County Commission approved a contract with the Tennessee Department of Human Services for the provision of Title IV-D child support enforcement services for the Knox County Sheriff's Office for the period beginning on July 1, 2025 and ending on June 30, 2026 (the "Contract"); and

WHEREAS, Knox County and the Tennessee Department of Human Services desire to enter into an amendment to the Contract to increase the maximum liability of the state by $281,108.05 for a new total maximum liability of $574,893.13, increase the local match requirement by $144,813.24, and extend the term of the Contract by one (1) year to expire June 30, 2027, as further detailed in the attach amendment to the Contract; and

WHEREAS, the contract provides partial reimbursement to Knox County for the salaries, benefits and operations for four (4) process servers and one (1) administrative assistant within the Knox County Sheriff's Office Juvenile Child Support Enforcement Division to perform Service of Process of all Title IV-D related process papers and subpoenas properly issued by any court or tribunal in Knox County with appropriate jurisdiction to do so.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

Amendment One to Contract 86143 with the Tennessee Department of Human Services for the provision of Title IV-D child support enforcement services for the Knox County Sheriff's Office is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, that Amendment One to Contract 86143 with the Tennessee Department of Human Services for the provision of Title IV-D child support enforcement services for the Knox County Sheriff's Office shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

CONTRACT AMENDMENT COVER SHEET

Agency Tracking #	Edison ID	Contract #	Amendment #
34513-21726		86143	1

Contractor Legal Entity Name	Edison Vendor ID
Knox County Sheriff's Office	2830

Amendment Purpose & Effect(s)

Extend Term. Increase maximum liability. Revise scope, E2, E3 and Budget

Amendment Changes Contract End Date: [x] YES [ ] NO **End Date:** June 30, 2027

TOTAL Contract Amount INCREASE or DECREASE per this Amendment (zero if N/A): $ 281,108.05

Funding ---

FY	State	Federal	Interdepartmental	Other	TOTAL Contract Amount
2026	$0.00	$293,785.08	$0.00	$0.00	$293,785.08
2027	$0.00	$281,108.05	$0.00	$0.00	$281,108.05
2028	$0.00	$0.00	$0.00	$0.00	$0.00
2029	$0.00	$0.00	$0.00	$0.00	$0.00
2030	$0.00	$0.00	$0.00	$0.00	$0.00
2031	$0.00	$0.00	$0.00	$0.00	$0.00
TOTAL:	**$0.00**	**$574,893.13**	**$0.00**	**$0.00**	**$574,893.13**

Budget Officer Confirmation: There is a balance in the appropriation from which obligations hereunder are required to be paid that is not already encumbered to pay other obligations.

Winfield Shiers

CPO USE

Speed Code (optional)	Account Code (optional)
	71301000

AMENDMENT ONE
OF CONTRACT 86143

This Amendment is made and entered by and between the State of Tennessee, Department of Human Services, hereinafter referred to as the "State" and Knox County Sheriff's Office, hereinafter referred to as the "Contractor." For good and valuable consideration, the sufficiency of which is hereby acknowledged, it is mutually understood and agreed by and between said, undersigned contracting parties that the subject contract is hereby amended as follows:

1. Contract Section A.8. is deleted in its entirety and replaced with the following:

   A.8. The State shall determine the Contractor's level of compliance with the performance measure specified in Section A.7. based upon monthly reports ("Service of Process Report(s)" or "Report(s)") submitted by the Contractor. Such reports shall be submitted using the Attachment B - Service of Process Report spreadsheet, which is herein by reference and made part of this Contract. The Service of Process Report shall include the total number of referrals received during the reporting month as well as the number of process papers and attachments successfully served during the same period. The Reports shall be received by the State within fifteen (15) calendar days of the end of the reporting month. Upon a determination by the State that the Contractor has failed to attain the requisite percentage specified in Section A.7., the Contractor will be notified of such and will be given ninety (90) days in which to take all necessary action so as to allow the Contractor to attain the percentage level required. If, after the ninety (90) day corrective action period, the Contractor is still unable to properly perform its obligations under this Contract, the State may, at its sole discretion, terminate the Contract as provided for in Section D.4.

2. The following is added as Contract Section A.16.

   A.16. Artificial Intelligence (AI) Use and Compliance Requirements. The Contractor agrees that any product, service, or solution incorporating Artificial Intelligence (AI), including Generative AI (GenAI), procured under this Contract shall comply fully with the State of Tennessee's **Enterprise Artificial Intelligence Policy (Policy 200-POL-007)**, available at: https://www.tn.gov/content/dam/tn/finance/artificial-intelligence/Enterprise_Artificial_Intelligence_Policy.pdf

   The Contractor further agrees to the following:

   a. **Data Privacy and Security**
      Contractor shall not use, access, store, transmit, or process any State Data—including but not limited to confidential, privileged, personally identifiable information (PII), protected health information (PHI), Payment Card Industry (PCI) data, criminal justice information (CJIS), federal tax information (FTI), Centers for Medicare & Medicaid Services (CMS) data, Social Security Administration (SSA) data, Family Education Rights & Privacy Act (FERPA) data, or internal communications—through any AI tools or platforms unless:

      1. The AI tool is explicitly approved in writing by the State.

      2. The tool is operated within a secure State-controlled or approved environment.

   b. **Prohibition on Model Training**
      Contractor shall not use State Data to train, fine-tune, or otherwise improve AI models, unless expressly authorized in writing by the State and in accordance with Policy No. 200-POL-007.

   c. **Transparency and Accountability**
      Contractor shall clearly disclose when AI tools are used in providing services or

generating content on behalf of the State. Contractor is responsible for the accuracy, reliability, and appropriateness of all AI-generated outputs.

d. **Use of Approved Tools Only**
Only State-approved AI platforms, systems, or services may be used in the performance of this Contract. Use of public, consumer, or non-State-managed AI platforms (e.g., ChatGPT, Google Gemini, etc.) with State Data is strictly prohibited unless authorized in writing.

e. **Ongoing Compliance and Risk Mitigation**
Contractor shall ensure continued compliance with evolving State and federal regulations related to AI. The State reserves the right to audit or review AI usage under this Agreement at any time.

f. **Indemnification**
Contractor shall further indemnify and hold harmless the State in accordance with the Hold Harmless section of this Agreement for any unauthorized disclosure, misuse, or compromise of State Data resulting from AI-related processing that violates this Agreement or State policy.

3. Contract Section B.1. is deleted in its entirety and replaced with the following:

B.1. This Contract shall be effective for the period beginning on July 1, 2025 ("Effective Date") and ending on June 30, 2027, ("Term"). The State shall have no obligation for goods delivered or services provided by the Contractor prior to the Effective Date.

4. Contract Section B.2. is deleted in its entirety and replaced with the following:

B.2. Renewal Options. This Contract may be renewed upon satisfactory completion of the Term. The State reserves the right to execute up to three (3) renewal options under the same terms and conditions for a period not to exceed twelve (12) months each by the State, at the State's sole option. In no event, however, shall the maximum Term, including all renewals or extensions, exceed a total of sixty (60) months.

5. Contract Section C.1. is deleted in its entirety and replaced with the following:

C.1. Maximum Liability. In no event shall the maximum liability of the State under this Contract exceed five hundred seventy-four thousand eight hundred ninety-three dollars and thirteen cents ($574,893.13). This amount shall constitute the entire compensation due the Contractor for all service and Contractor obligations hereunder regardless of the difficulty, hours worked, or materials or equipment required. The Contract Amount includes, but is not limited to, all applicable taxes, fees, overhead, profit, and all other direct and indirect costs incurred or to be incurred by the Contractor.

6. Contract Section C.3. is deleted in its entirety and replaced with the following:

C.3. The Contractor shall be reimbursed for actual, reasonable, and necessary costs based upon the Contract Budget, not to exceed the Maximum Liability established in Section C.1. Upon progress toward the completion of the Scope, as described in Section A of this Contract, the Contractor shall submit invoices prior to any reimbursement of allowable costs. The Contract Budget, attached and incorporated hereto as Attachment A, and A-1, shall constitute the maximum amount due the Contractor under this Contract. The Contract Budget line-items include, but are not limited to, all applicable taxes, fees, overhead, and all other direct and indirect costs incurred or to be incurred by the Contractor that are allowable.

7. Contract Section E.2. is deleted in its entirety and replaced with the following:

E.2. Communications and Contacts. All instructions, notices, consents, demands, or other communications required or contemplated by this Contract shall be in writing and shall be made by certified, first class mail, return receipt requested and postage prepaid, by overnight courier service with an asset tracking system, or by email or facsimile transmission with recipient confirmation. All communications, regardless of method of transmission, shall be addressed to the respective Party at the appropriate mailing address, facsimile number, or email address as stated below or any other address provided in writing by a Party.

The State:

Stacie Alexander, Director
Central Registry and Child Support Contracts
Department of Human Services
505 Deaderick Street
James K. Polk Building, 16th Floor
Nashville, TN 37243
Email: CsContract.ManagementUnit@tn.gov
CC: Stacie.Alexander@tn.gov
Phone # (615) 742-4431
Fax # (615) 524-3212

Kayleen Winters, Program Coordinator
Child Support Contracts
Department of Human Services
505 Deaderick Street
James K. Polk Building, 16th Floor
Nashville, TN 37243
Email: CsContract.ManagementUnit@tn.gov
CC: Kayleen.Winters@tn.gov
Phone # (615) 253-6429

The Contractor:

Allison Rogers, Finance Director Knox County Sheriff's Office
400 Main Avenue, Suite L-147
Knoxville, TN 37902
Email: Allison.Rogers@knoxsheriff.org
Phone #: (865) 215-2585
FAX # (865) 215-4687

Hugh Holt, Procurement Director Knox County Sheriff's Office
400 Main Avenue, Suite L-165
Knoxville, TN 37902
Email: Hugh.Holt@knoxsheriff.org
Phone #: (865) 257-7753

All instructions, notices, consents, demands, or other communications shall be considered effective upon receipt or recipient confirmation as may be required.

8. Contract Section E.3. is deleted in its entirety and replaced with the following:

E.3. Subject to Funds Availability. The Contract is subject to the appropriation and availability of State and/or Federal funds. In the event that the funds are not appropriated or are otherwise unavailable, the State reserves the right to terminate or suspend the Contract upon written notice to the Contractor. Said termination or suspension shall not be deemed a breach of Contract by the State. Upon receipt of the written notice, the Contractor shall cease all work associated with the Contract. Should such an event occur, the Contractor shall be entitled to compensation for all satisfactory and authorized services completed as of the termination or suspension date but shall not be entitled to compensation for any services performed

subsequent to termination date or during a period of suspension. Upon such termination or suspension, the Contractor shall have no right to recover from the State any actual, general, special, incidental, consequential, or any other damages whatsoever of any description or amount.

9. Contract Attachment A-1 attached hereto is added as a new Attachment.

10. Contract Attachment B attached hereto is added as a new Attachment.

Required Approvals. The State is not bound by this Amendment until it is signed by the contract parties and approved by appropriate officials in accordance with applicable Tennessee laws and regulations (depending upon the specifics of this contract, said officials may include, but are not limited to, the Commissioner of Finance and Administration, the Commissioner of Human Resources, and the Comptroller of the Treasury).

Amendment Effective Date. The revisions set forth herein shall be effective July 1, 2026. All other terms and conditions of this Contract not expressly amended herein shall remain in full force and effect.

IN WITNESS WHEREOF,

KNOX COUNTY SHERIFF'S OFFICE:

TOM SPANGLER, KNOX COUNTY SHERIFF **DATE**

GLENN JACOBS, KNOX COUNTY MAYOR **DATE**

DAVID BUUCK, KNOX COUNTY LAW DIRECTOR **DATE**

DEPARTMENT OF HUMAN SERVICES:

CLARENCE H. CARTER, COMMISSIONER **DATE**

CONTRACT BUDGET

Knox County Sheriff's Office

The grant budget line-item amounts below shall be applicable only to expenses incurred during the period beginning 07/01/2026, and ending 06/30/2027.

	EXPENSE OBJECT LINE-ITEM CATEGORY [1]	GRANT CONTRACT	GRANTEE PARTICIPATION	TOTAL PROJECT
	Salaries [2]	$212,884.29	$109,667.67	$322,551.96
	Benefits & Taxes	$45,598.96	$23,490.37	$69,089.33
	Professional Fees/Grant & Awards [2]	$0.00	$0.00	$0.00
	Supplies	$2,112.00	$1,088.00	$3,200.00
	Telephone	$2,824.80	$1,455.20	$4,280.00
	Postage & Shipping	$0.00	$0.00	$0.00
	Occupancy	$0.00	$0.00	$0.00
	Equipment Rental & Maintenance	$0.00	$0.00	$0.00
	Printing & Publications	$363.00	$187.00	$550.00
	Travel, Conferences & Meetings [2]	$17,325.00	$8,925.00	$26,250.00
	Interest	$0.00	$0.00	$0.00
	Insurance	$0.00	$0.00	$0.00
	Specific Assistance To Individuals	$0.00	$0.00	$0.00
	Depreciation	$0.00	$0.00	$0.00
	Other Non-Personnel	$0.00	$0.00	$0.00
	Capital Purchase	$0.00	$0.00	$0.00
	Indirect Cost (% and method)	$0.00	$0.00	$0.00
	In-Kind Expense	$0.00	$0.00	$0.00
	GRAND TOTAL	$281,108.05	$144,813.24	$425,921.29

1 Each expense object line-item is defined by the U.S. OMB's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, Subpart E Cost Principles (posted on the Internet at: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-E) and CPO Policy 2013-007 (posted online at https://www.tn.gov/generalservices/procurement/central-procurement-office--cpo/library.html)

2 Applicable detail follows this page if line-item is funded.

GRANT BUDGET LINE-ITEM DETAIL:

SALARIES	AMOUNT
SALARIES AND BENEFITS FOR 4 OFFICERS AND 1 ADMIN ASST	$322,551.96
TOTAL	**$322,551.96**

TRAVEL/CONFERENCES & MEETINGS	AMOUNT
FUEL, MAINTENANCE OF VEHICLES	$26,250.00
TOTAL	**$26,250.00**

ATTACHMENT B

Tennessee Department of Human Services

Child Support Service of Process

Contractor:	Example County
Month/Year:	7/1/2026

Type	Issued	Served	Bad Address	Withdrawn	Service Rate
Attachments					#DIV/0!
Summons					#DIV/0!
Other					#DIV/0!
Total	0	0	0	0	#DIV/0!

RLA-18128 **R-26-3-401**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Erin Kelbly, ENGINEERING AND PUBLIC WORKS
Department:	ENGINEERING AND PUBLIC WORKS
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving Amendment No. 3 to the Local Agency Project Agreement with the Tennessee Department of Transportation (TDOT) for the Knox County ATMS Phase II project to revise Exhibit A with additional PE-NEPA and PE-DESIGN funds.
(Engineering and Public Works)

Attachments

Resolution
ATMS Ph 2 Amendment No. 3

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING AMENDMENT NO. 3 TO THE LOCAL AGENCY PROJECT AGREEMENT WITH THE TENNESSEE DEPARTMENT OF TRANSPORTATION (TDOT) FOR THE KNOX COUNTY ATMS PHASE II PROJECT TO REVISE EXHIBIT A WITH ADDITIONAL PE-NEPA AND PE-DESIGN FUNDS.

RESOLUTION: **R-26-3-401**

REQUESTED BY: **ENGINEERING & PUBLIC WORKS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, by means of Resolution R-20-2-402, the Knox County Commission approved a Local Agency Project Agreement between Knox County and the Tennessee Department of Transportation for the Knox County ATMS Phase II project, which project is designated by the Tennessee Department of Transportation as Project Identification Number 128833.000, Federal Project Number CM-4700(64), and State Project No. 47LPLM-F3-178 (the "Contract"); and

WHEREAS, by means of Resolution R-25-1-407, the Knox County Commission approved Amendment Number 1 to the Contract to extend the completion deadline to September 30, 2026; and

WHEREAS, by means of Resolution R-25-10-401, the Knox County Commission approved Amendment Number 2 to the Contract to extend the completion deadline to October 31, 2026; and

WHEREAS, Knox County and the Tennessee Department of Transportation now desire to enter into Amendment Number 3 to the Contract to revise Exhibit A with additional PE-NEPA and PE-DESIGN funds, as further detailed in the attached amendment to the Contract.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

Amendment Number 3 to the Local Agency Project Agreement with the Tennessee Department of Transportation for the Knox County ATMS Phase II project to revise Exhibit A with additional PE-NEPA and PE-DESIGN funds is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, that Amendment Number 3 to the Local Agency Project Agreement with the Tennessee Department of Transportation for the Knox County ATMS Phase II project to revise Exhibit A with additional PE-NEPA and PE-DESIGN funds shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor **Date**

Vetoed:_____

County Mayor **Date**

STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
LOCAL PROGRAMS & COMMUNITY INVESTMENTS DIVISION
12TH FLOOR, WILLIAM R. SNODGRASS TOWER
312 ROSA L. PARKS AVENUE
NASHVILLE, TENNESSEE 37243
(615) 741-2208

WILL REID
COMMISSIONER

BILL LEE
GOVERNOR

February 2, 2026

The Honorable Glenn Jacobs
Mayor, Knox County
City/County Bldg., Suite 615
400 Main Street
Knoxville, TN 37902

Re: Knox County ATMS Phase II
Knox County
PIN: 128833.00
Federal Project Number: CM-4700(64)
State Project Number: 47LPLM-F3-178
Agreement Number: 190383

Dear Mayor Jacobs:

I am attaching an amendment to the original contract to this letter. The amendment deletes and replaces the Exhibit A. Please review the amendment and advise me if it requires further explanation. If you find the amendment satisfactory, please execute it in accordance with all rules, regulations, and laws. Adobe Sign will then forward the document for the signature of the attorney for your agency. Once the amendment is fully executed Adobe Sign will email you a link to the fully executed amendment.

If you have any questions or need any additional information, please contact Kristen Annecchiarico at 615-253-3075 or kristen.annecchiarico@tn.gov.

Sincerely,

Mike Gilbert

Mike Gilbert
Manager, Local Programs & Community Investments Division

Attachment

Amendment Number: 3

Agreement Number: 190383

Project Identification Number: 128833.00

Federal Project Number: CM-4700(64)

State Project Number: 47LPLM-F3-178

THIS AGREEMENT AMENDMENT is made and entered into this _____ day of _____, 20___ by and between the STATE OF TENNESSEE DEPARTMENT OF TRANSPORTATION, an agency of the State of Tennessee (hereinafter called the "Department") and the KNOX COUNTY (hereinafter called the "Agency"), for the purpose of providing an understanding among the parties of their respective obligations related to the management of the project described as:

Knox County ATMS Phase II

1. The language of Agreement # 190383 A2 dated November 10, 2025 Exhibit A is hereby deleted in its entirety and replaced with the attached Exhibit A for Amendment 3 .

All provisions of the original contract not expressly amended hereby shall remain in full force and effect.

IN WITNESS WHEREOF, the parties have caused this instrument to be executed by their respective authorized officials on the date first above written.

KNOX COUNTY

By: _____ _____
Glenn Jacobs **Date**
Mayor

APPROVED AS TO FORM AND LEGALITY

By: _____ _____
David Buuck **Date**
Attorney

STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION

By: _____ _____
Will Reid **Date**
Commissioner

APPROVED AS TO FORM AND LEGALITY

By: _____ _____
Leslie South **Date**
General Counsel

By: _____ _____
Steve Allen **Date**
Director, Local Programs & Community Investments Division

EXHIBIT "A" for AMENDMENT 3

Agreement #: **190383**
Project Identification #: **128833.00**
Federal Project #: **CM-4700(64)**
State Project #: **47LPLM-F3-178**

Project Description: Knox County ATMS Phase II. Phase II will include a variety of signal upgrades at four intersections, and DSRC equipment at 11 other intersections completed during Phase 1. The proposed improvements that are included at the 4 new intersections of Phase II are the installation of new traffic signal controllers , dedicated short-range communication (DSRC) units, non-intrusive fish-eye video detection, wireless interconnect, malfunction management units (MMU), battery backups, new signal cabinets, and the development of coordinated timings. Additionally at 11 locations DSRC equipment will be added to cabinets completed during Phase 1.

Change in Cost: Cost hereunder is controlled by the figures shown in the TIP and any amendments, adjustments or changes thereto.

Type of Work: Intelligent Transportation System

Phase	Funding Source	Fed %	State %	Local %	Estimated Cost
PE-NEPA	CMAQ	100	0	0	$56,000.00
PE-DESIGN	CMAQ	100	0	0	$161,324.00
CONSTRUCTION	CMAQ	100	0	0	$1,979,886.00
CEI	CMAQ	100	0	0	$237,900.00
TDOT ES	CMAQ	100	0	0	$14,688.00

Ineligible Cost: One hundred percent (100%) of the actual cost will be paid from Agency funds if the use of said state or federal funds is ruled ineligible at any time by the Federal Highway Administration.

Legislative Authority: CMAQ: 23 U.S.C.A., Section 149, Congestion Mitigation and Air Quality Improvement Program funds allocated or subject to allocation to the Agency.

TDOT Engineering Services (TDOT ES): In order to comply with all federal and state laws, rules, and regulations, the TDOT Engineering Services line item in Exhibit A is placed there to ensure that TDOT's expenses associated with the project during construction are covered.

For federal funds included in this contract, the CFDA Number is 20.205, Highway Planning and Construction funding provided through an allocation from the US Department of Transportation.

RLA-18140 **R-26-3-402**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Zach Johnson, SOLID WASTE
Department:	SOLID WASTE
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the issuance of a Jackson Law approval letter to Liberty Tire Recycling, LLC allowing them to proceed with the Tennessee Department of Environment and Conservation's (TDEC) Permit by Rule permit approval process.
(Engineering and Public Works)

Attachments

Resolution
Executive Summary
Solid Waste Board Recommendation Letter
Liberty Tire Recycling, LLC - Jackson Law Packet

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING THE ISSUANCE OF A JACKSON LAW APPROVAL LETTER TO LIBERTY TIRE RECYCLING, LLC ALLOWING THEM TO PROCEED WITH THE TENNESSEE DEPARTMENT OF ENVIRONMENT AND CONSERVATION'S (TDEC) PERMIT BY RULE PERMIT APPROVAL PROCESS.

RESOLUTION: **R-26-3-402**

REQUESTED BY: **ENGINEERING & PUBLIC WORKS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, by means of Resolution R-11-10-409, the Knox County Commission previously adopted by a two-thirds (2/3) majority vote the provisions of Tennessee Code Annotated Sections 68-211-701 through 704 and 707, also known as the Jackson Law, as amended; and

WHEREAS, Tenn. Code Ann. § 68-211-701 requires the approval of the Knox County Commission prior to the construction of a new landfill for solid waste disposal or for solid waste processing within the borders of Knox County; and

WHEREAS, the approval of the local legislative body is necessary prior to the Tennessee Department of Environment and Conservation considering and issuing a permit for solid waste processing activities; and

WHEREAS, Liberty Tire Recycling, LLC has submitted an application to operate a solid waste processing facility located at 1700 Transport Lane, Knoxville, Tennessee 37924; and

WHEREAS, on February 10, 2026, the Knox County Regional Solid Waste Board convened to discuss the application of Liberty Tire Recycling, LLC and found that the application is consistent with the adopted Regional Solid Waste Plan; and

WHEREAS, the Knox County Commission finds it in the best interest of Knox County to approve the issuance of a Jackson Law approval letter to Liberty Tire Recycling, LLC allowing Liberty Tire Recycling, LLC to proceed with the Tennessee Department of Environment and Conservation's (TDEC) Permit by Rule permit approval process.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

Pursuant to the provisions of Tennessee Code Annotated Sections 68-211-701, *et seq*., also known as the Jackson Law, the Knox County Commission hereby approves the issuance of a Jackson Law approval letter to Liberty Tire Recycling, LLC allowing Liberty Tire Recycling, LLC to proceed with the Tennessee Department of Environment and Conservation's (TDEC) Permit by Rule permit approval process to operate a solid waste processing facility located at 1700 Transport Lane, Knoxville, Tennessee 37924.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Executive Summary

The Jackson Law (TCA § 68-211-701) is a state law providing a legal basis for Counties and Municipalities to approve or deny solid waste processing facility and landfill permit approval. Knox County Commission must decide whether or not a solid waste processing or landfill permit may be issued by The Department of Environment and Conservation (TDEC). Approval is often referred to as a "Jackson Law Letter" to TDEC.

Knox County Commission may approve or deny a Jackson Law approval for reasons they deem are in the public interest or public good. (TDEC makes its decision to issue a permit based on technical considerations). It is recommended that Commission approve or deny applicants Jackson Law approval on the following grounds: Would approval result in the most cost effective and efficient management of municipal solid waste in the best interest of the citizens of Knox County?

TDEC will not consider or proceed with their permit review until the applicant can show a Jackson Law letter of approval was granted by Knox County Commission. In some instances, TDEC may also require the Knox County Regional Solid Waste Board to rule whether proposed activities are consistent with the plan. TDEC will not undergo a time consuming technical review of a permit application if there is a chance the local government could later refuse to allow the permit to be approved on non-technical grounds. Meaning an applicant's permit is effectively denied if the County does not issue a Jackson Law letter.

TDEC is limited to considering specific permit requirements under TDEC rules that specify how permit holders must operate under the statutes when reviewing and granting Solid Waste Processing and Landfill permits. For example, TDEC may look at the rules governing a Solid Waste Processing or Landfill permit and examine if the applicant plans to handle, store, and ultimately dispose of the material correctly. In most instances, TDEC periodically visits permit holders to ensure compliance with TDEC rules.

Solid Waste Processing permits are often permits by rule. There are fewer barriers for approval when applying for a permit by rule. Consequently there are also fewer barriers for approval for permit holders wishing to relocate, expand, or modify their existing permitted activities.

Zach Johnson
Director, Solid Waste
Knox County Engineering and Public Works

KNOX COUNTY
TENNESSEE

ENGINEERING & PUBLIC WORKS

Finance & Administration • Development Services • Fleet Services • Operations

February 10th, 2026

Knox County Commission
City County Building
Suite 603
400 Main Street
Knoxville, TN 37902

Dear Commissioners,

On February 10, the Knox County Regional Solid Waste Board held a publicly noticed meeting to review Liberty Tire's Jackson Law letter request. Although the Tennessee Department of Environment and Conservation (TDEC) does not require Board review, Engineering and Public Works sought the Board's input to provide an additional level of community review. The Board's role is limited to determining consistency with the Knox County Regional Solid Waste Plan. The Jackson Law grants broader authority to County Commission to consider other public interest factors.

With an in-person quorum present, the Board voted to recommend issuance of the Jackson Law letter based on the presentation and supporting materials provided by Liberty Tire's representative. In reaching this decision, the Board also considered the benefits Liberty Tire provides to the region. The Board determined that Liberty Tire's operations are consistent with the Knox County Regional Solid Waste Plan and related planning documents.

Best regards,

Nick Jackson

Nick Jackson, Chairperson
Knox County Regional Solid Waste Board



June 30, 2025

Liberty Tire Recycling, LLC Notification Process Document Overview TDEC Meeting

Liberty TIRE RECYCLING

Liberty Tire Overview (2024)



Liberty Tire Recycling, LLC

Proximity Map:

1700 Transport Lane

Nashville, TN 37924

Site ID: RMF470000012



1700 Transport Ln

Building

Directions Save Nearby Send to phone Share

1700 Transport Ln, Knoxville, TN 37924

Suggest an edit on 1700 Transport Ln

Add a missing place

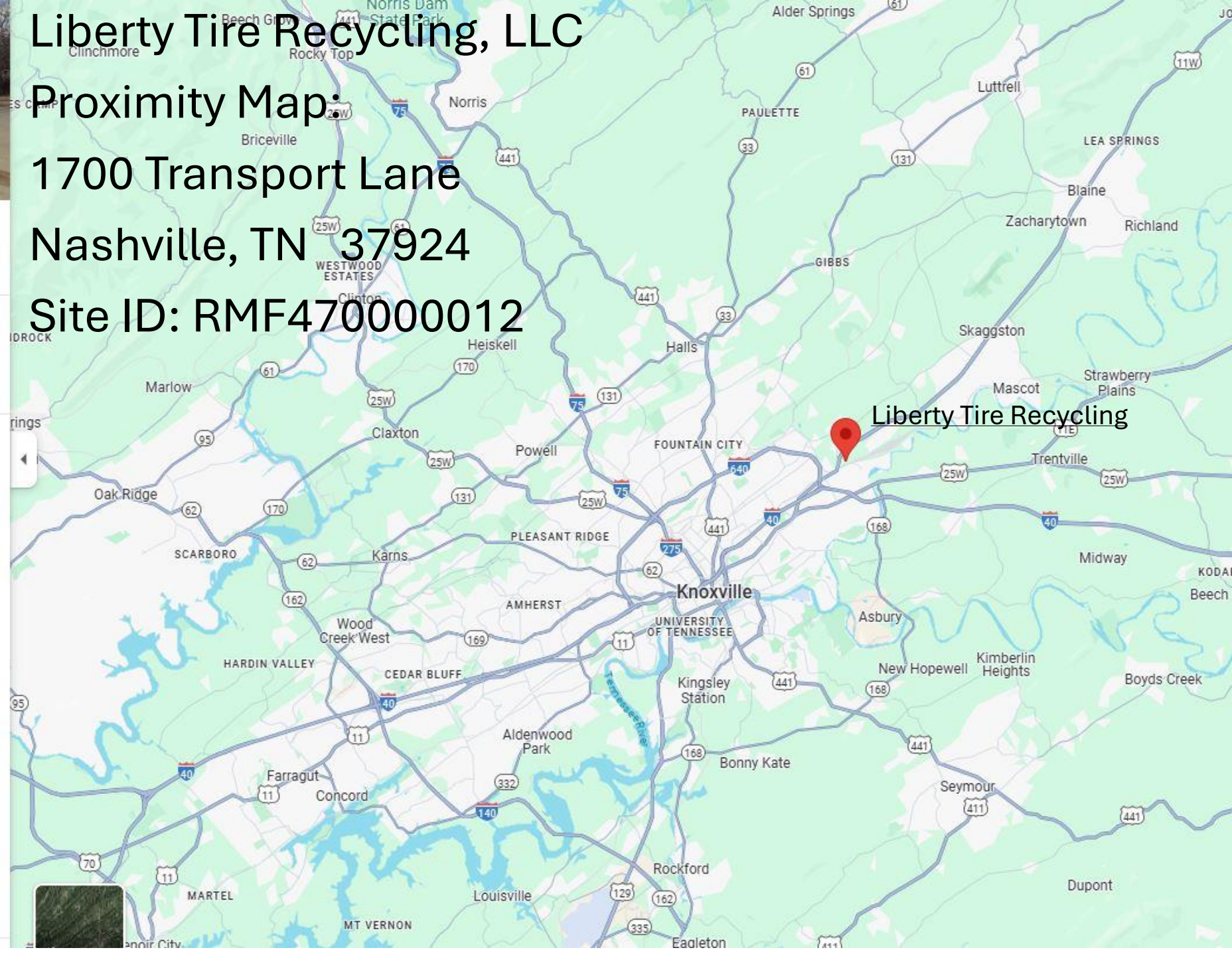
Add your business

Add a label

Your Maps activity

Photos





Present Site View & Daily Volume

1700 Transport Lane, Knoxville, TN
Liberty Tire Recycling, LLC

Knoxville Volume (Daily)

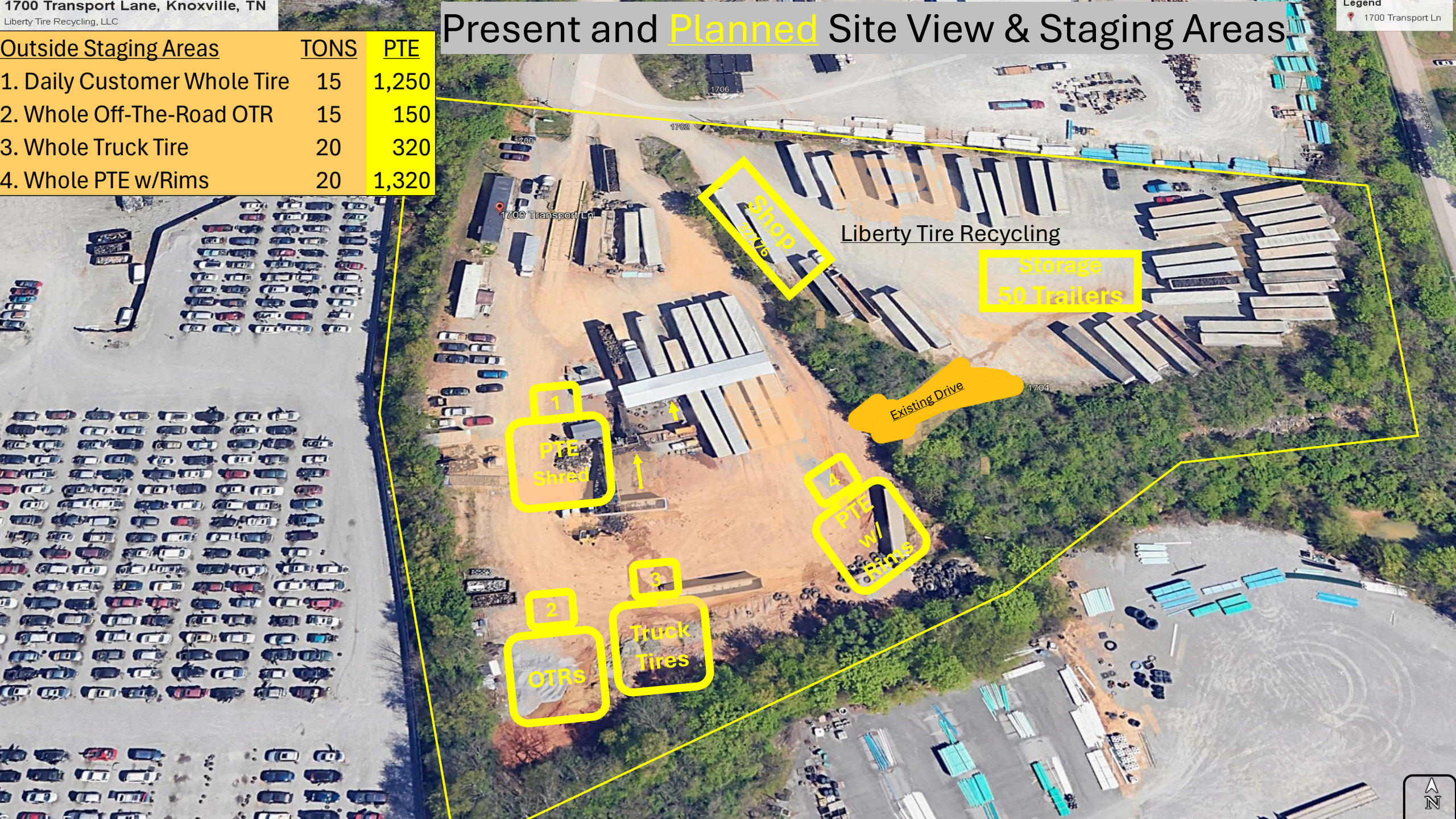
Totals Tons Per Day	**115**	**Destination**
Primary Shred	80	Disposal
Whole Tire Truck	15	Calhoun
Whole Tire OTR	14	Marion
Grade	6	Customers
Rims	1/4	Scrap Metal
Tires w/Rims	1/4	Scrap Metal



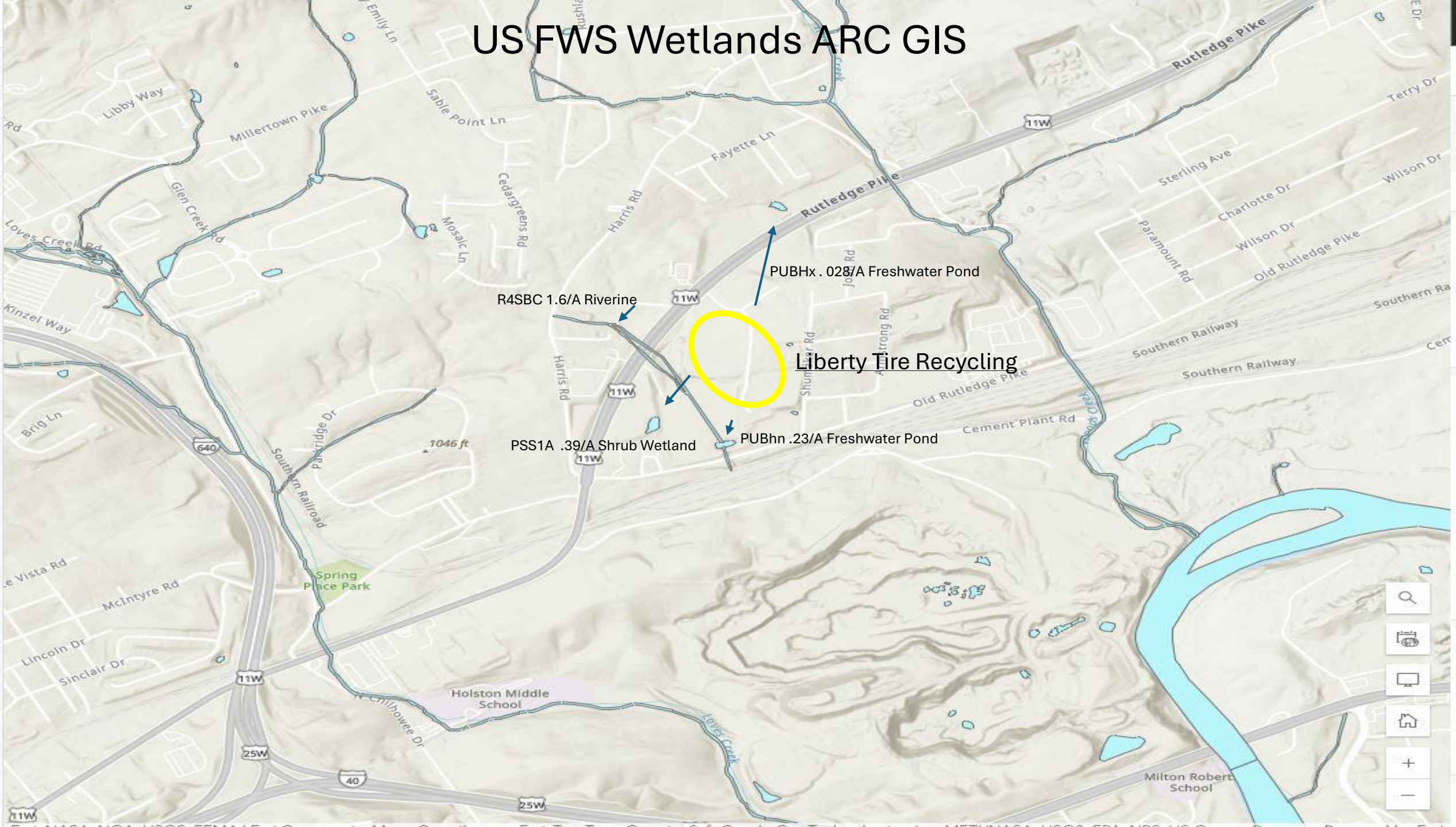
1700 Transport Lane, Knoxville, TN
Liberty Tire Recycling, LLC

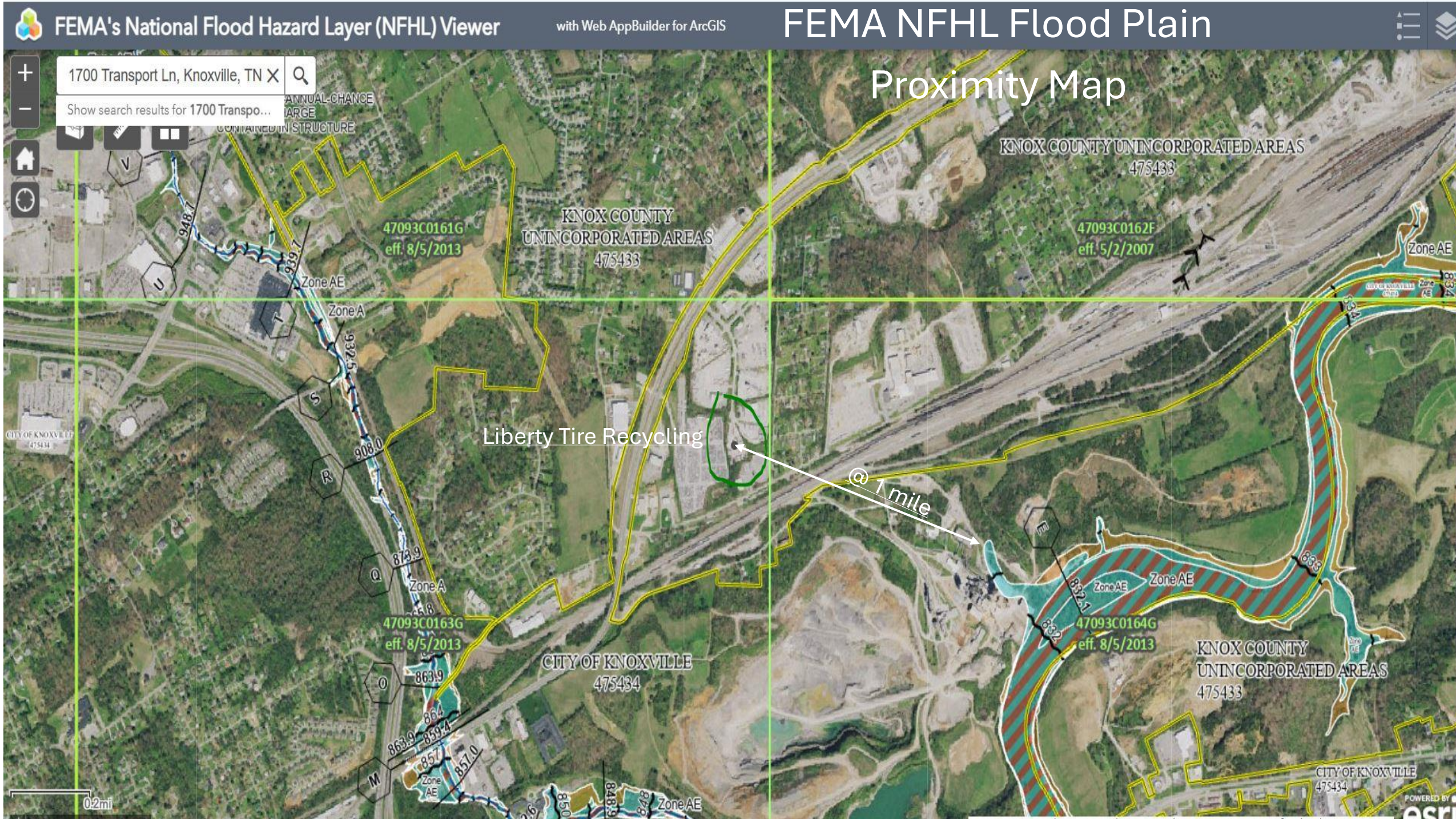
Present and Planned Site View & Staging Areas

Outside Staging Areas	TONS	PTE
1. Daily Customer Whole Tire	15	1,250
2. Whole Off-The-Road OTR	15	150
3. Whole Truck Tire	20	320
4. Whole PTE w/Rims	20	1,320



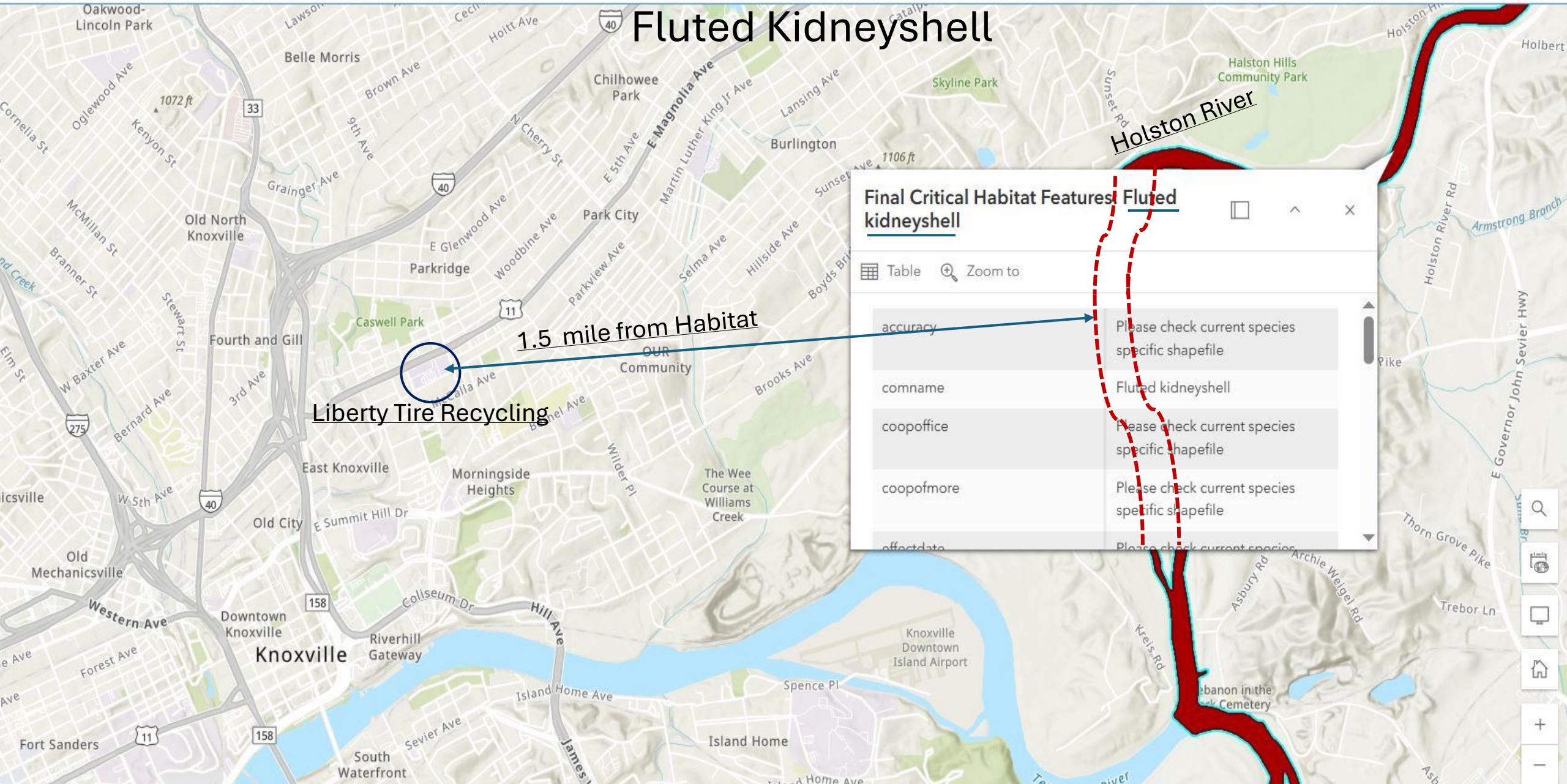
US FWS Wetlands ARC GIS



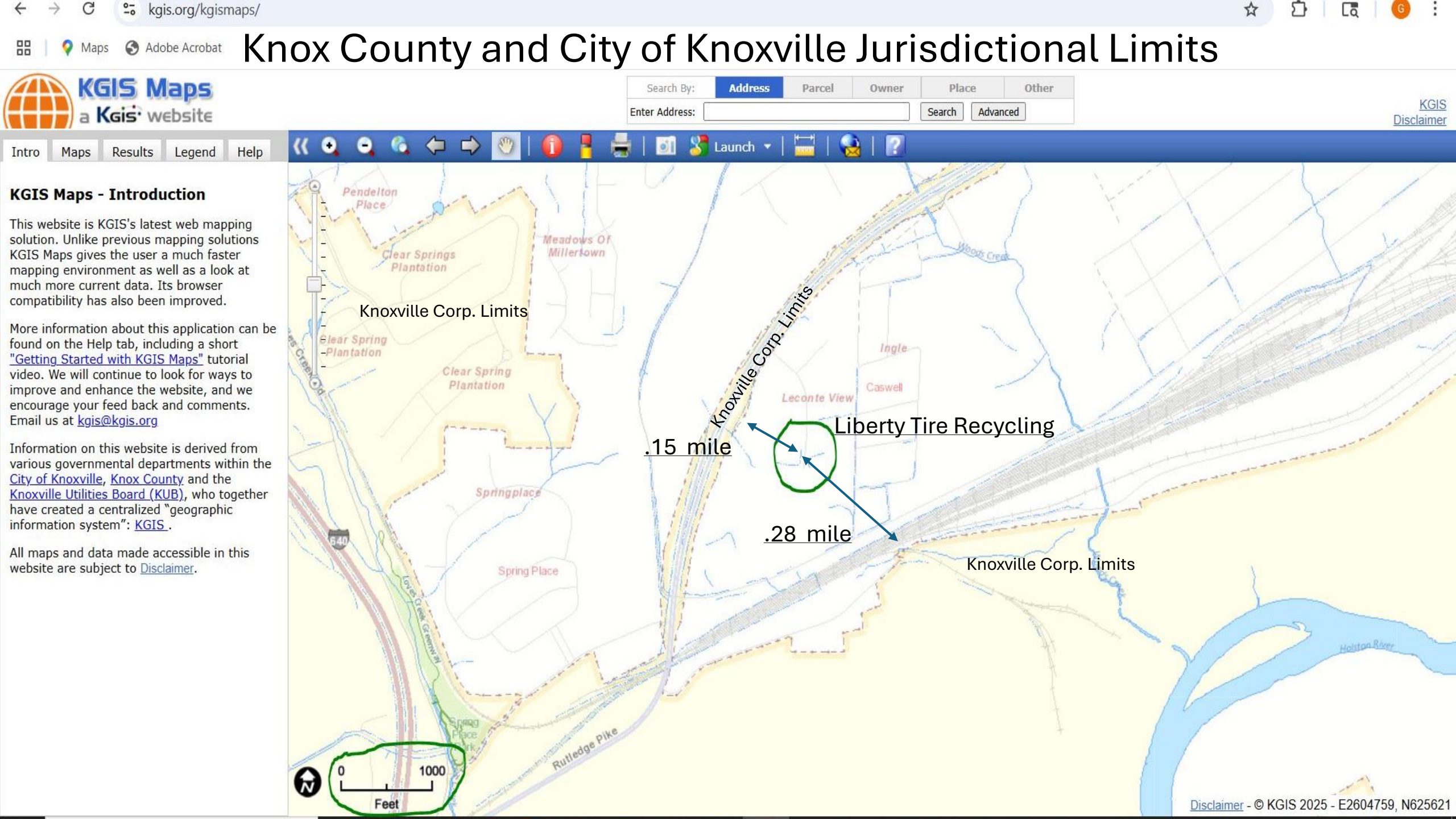

FEMA's National Flood Hazard Layer (NFHL) Viewer
with Web AppBuilder for ArcGIS
FEMA NFHL Flood Plain
Proximity Map
1700 Transport Ln, Knoxville, TN
Show search results for 1700 Transpo...
KNOX COUNTY UNINCORPORATED AREAS
475433
47093C0161G
eff. 8/5/2013
47093C0162F
eff. 5/2/2007
CITY OF KNOXVILLE
475434
47093C0163G
eff. 8/5/2013
47093C0164G
eff. 8/5/2013
Zone AE
Zone A
Liberty Tire Recycling
@ 1 mile
0.2mi

US FWS: Final Critical Habitat

Fluted Kidneyshell



Knox County and City of Knoxville Jurisdictional Limits





Liberty Tire Recycling, LLC

Anthony Brown
abrown@libertytire.com

Greg Peverall
gpeverall@libertytire.com

Liberty
TIRE RECYCLING

Closure Plan Updated 6/27/2025

Liberty Tire Recycling, LLC
1700 Transport Lane
Knoxville, TN 37924

Background:

- The existing operation is to cross dock all good resalable tires and shred all scrap tires on our open-air dock.
- Daily inbound volume that is processed for shredding is proposed to be 115 tons per day.
- Volume shredded daily would be shipped outbound within 24 hours excluding weekends and holidays.
- Other volumes not shredded will continue to be shipped as whole tires.

Closure Plan:

- Any whole tires onsite that are daily cross-dock volume would be shredded and loaded into trailers. D&L Transport will transport the trailers to Waste Management Chestnut Ridge Landfill for disposal of the rubber shred.
- At any one time, the maximum number of trailers containing whole tires is (50). The expense to transport and dispose that volume is listed below. Whole tire trailers on average weigh (10) tons each, totaling 500 additional tons to shred.
- Liberty will remove and relocate any shredding equipment and or machinery used in conjunction with the shredding operation to another Liberty facility for future use.
- Liberty will use a bobcat and excavator to remove any remaining debris.
- Liberty will have the two office trailers removed by its lease owner.

Knoxville, TN - Closure Cost Estimate Worksheet	**Updated Cost Estimate for RMPF DRAFT v. 6/27/2025**
Estimated Cost	
Mobilization (Relocating Processing Equipment Offsite)	**$5,000**
70/T Staged Volume At $50/T Disposal	**$3,500**
5 loads by D&L at $550 per load (Freight Staged Volume)	**$2,750**
500 Tons x $200 (50 Trailers 10/T Trailer Freight & Disposal)	**$100,000**
Estimate: Equipment/Labor To Clean Site	**$5,500**
Cost to remove 2 office trailers	**$3,500**
TOTAL	**$120,250**

STATE OF TENNESSEE
DEPARTMENT OF ENVIRONMENT AND CONSERVATION
DIVISION OF SOLID WASTE MANAGEMENT
DAVY CROCKETT TOWER, 7TH FLOOR
500 JAMES ROBERTSON PARKWAY
NASHVILLE, TN 37243

SOLID WASTE PERMIT-BY-RULE NOTIFICATION

1. REVIEW FEE ENCLOSED?
- (●) YES ⇨ [✓] NEW PROCESSING FACILITY ($1,000)
- ( ) NO [ ] NEW TRANSFER STATION ($500)

2. TYPE OF PERMIT- BY- RULE REQUESTED

( ) COMPOST FACILITY ( ) LAND APPLICATION ( ) TIRE STORAGE FACILITY ( ) NEW FACILITY
( ) CONVENIENCE CENTER (●) PROCESSING FACILITY ( ) TRANSFER STATION ( ) AMENDMENT TO EXISTING PERMIT

PROCESSING FACILITIES ONLY
IS THIS FACILITY SUBJECT TO "THE JACKSON LAW"? ( ) YES ( ) NO

3. FACILITY INFORMATION

FULL LEGAL NAME OF FACILITY: Liberty Tire Recycling, LLC

FACILITY LOCATION COUNTY: Knox

LATITUDE (DECIMAL DEGREES): 36.02766 N

LONGITUDE (DECIMAL DEGREES): 83.84562 W

PHYSICAL LOCATION OR ADDRESS OF FACILITY	CITY	STATE	ZIP
1700 Transport Way	Knoxville	TN	37924

FACILITY MAILING ADDRESS	CITY	STATE	ZIP	FACILITY EMAIL
1700 Transport Way	Knoxville	TN	37924	abrown@libertytire.com

FACILITY MANAGER OR SITE OPERATOR	PHONE (WITH AREA CODE)	AFFILIATION OF SITE OPERATOR (IF DIFFERENT FROM PERMITTEE)
Josh Graham	865 963 4980	General Manager

4. APPLICANT (PERMITTEE)

APPLICANT NAME	PHONE (WITH AREA CODE)	EMAIL
Liberty Tire Recycling, LLC	865 963 4980	abrown@libertytire.com

RESPONSIBLE OFFICIAL / TITLE	PHONE (WITH AREA CODE)	EMAIL
Anthony Brown, Regional Manager	706 537 5317	abrown@libertytire.com

RESPONSIBLE OFFICIAL MAILING ADDRESS	CITY	STATE	ZIP
1700 Transport Way	Knoxville	TN	37924

LANDOWNER NAME	LANDOWNER MAILING ADDRESS	CITY	STATE	ZIP
Walker's Construction Company, Inc.	P.O. Box 6227	Knoxville	TN	37914

⇨ _____ LANDOWNER SIGNATURE _____ LANDOWNER SIGNATURE _____ LANDOWNER SIGNATURE _____ DATE

5. WASTE HANDLING

DESCRIPTION OF ACTIVITIES AND WASTES HANDLED OR PROCESSED	AMOUNT OF WASTE HANDLED, PROCESSED OR STORED		
	WEIGHT TONS / DAY	VOLUME YARDS / DAY	STORAGE MAX CU YARDS
Scrapped Tire Processing And Transportation	115/Tons	230/CY/Day	7,000/CY

6. CERTIFICATION REQUIRED

I certify under penalty of law that this document and all attachments were prepared by me, or under my direction or supervision. The submitted information is to the best of my knowledge and belief, true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment. As specified in Tennessee Code Annotated Section 39-16-702(a)(4), this declaration is made under penalty of perjury.

⇨ _____ SIGNATURE OF RESPONSIBLE OFFICIAL _____ PRINTED NAME

_____ TITLE _____ DATE

⇨ _____ SIGNATURE OF NOTARY _____ DATE COMMISSION EXPIRES

(NOTARY SEAL)

FD102116

INSTRUCTIONS FOR SOLID WASTE PERMIT-BY-RULE NOTIFICATION

COMPLETE THIS FORM FOR EACH FACILITY THAT IS PROCESSING AND/OR DISPOSING OF SOLID WASTE IN TENNESSEE. IF MULTIPLE FACILITIES EXIST OR ARE PLANNED, DESCRIBE EACH FACILITY AND ITS WASTES ON A SEPARATE FORM. SUBMIT COMPLETED DOCUMENT TO THE RESPECTIVE FIELD OFFICE IN YOUR AREA.

1. REVIEW FEE

TYPE OF PERMIT-BY-RULE WITH FEES

A FEE IS ONLY REQUIRED FOR A NEW PROCESSING FACILITY OR A NEW TRANSFER FACILITY.
MAKE CHECKS PAYABLE TO: **"TREASURER, STATE OF TENNESSEE"**

2. TYPE OF PERMIT- BY- RULE REQUESTED

TYPE OF PERMIT-BY-RULE

CHECK TYPE OF PERMIT-BY-RULE REQUESTED AND DISTINGUISH IF THIS REQUEST IS FOR AN ALREADY EXISTING FACILITY OR A REQUEST FOR A NEW FACILITY.

NEW PROCESSING FACILITIES MUST DETERMINE IF THEY ARE SUBJECT TO LOCAL APPROVAL THROUGH THE "JACKSON LAW" AS SPECIFIED IN TENNESSEE CODE ANNOTATED § 68-211-701.

3. FACILITY INFORMATION

FULL LEGAL NAME OF FACILITY

ENTER THE FULL LEGAL NAME FOR THIS SITE TO DISTINGUISH IT FROM ANY OTHER SITE THE APPLICANT OR ORGANIZATION MAY OWN OR OPERATE IN TENNESSEE.

PHYSICAL LOCATION

INFORMATION (ADDRESS, DIRECTIONS) THAT WILL AID IN FINDING THIS SITE (NO PO BOX NUMBERS!) PROVIDE COUNTY WHERE SITE IS LOCATED. PROVIDE LATITUDE AND LONGITUDE FOR SITE LOCATION IN DECIMAL DEGREES.

FACILITY MAILING ADDRESS

PROVIDE COMPLETE MAILING ADDRESS FOR THIS SITE

NAME OF FACILITY OR SITE MANAGER OR SITE OPERATOR

NAME AND PHONE NUMBER OF PERSON WHO IS RESPONSIBLE FOR THE DIRECTION OF ACTIVITIES AT THIS SITE

AFFILIATION OF SITE OPERATOR (IF DIFFERENT FROM PERMITTEE)

IF SITE IS OPERATED BY PERSON OR ENTITY OTHER THAN PERMITTEE, GIVE NAME OF PERSON, CORPORATION ETC.

4. APPLICANT (PERMITTEE)

APPLICANT NAME

NAME OF LEGAL ENTITY MAKING APPLICATION FOR PERMIT. THIS NAME WILL BE THE PERMITTEE OF RECORD.

RESPONSIBLE OFFICIAL

PERSON AUTHORIZED TO COMPLETE THIS APPLICATION AND WHO MAY BE CONTACTED BY TDEC FOR ANY FURTHER INFORMATION.

LANDOWNER NAME

PERSON(S) OR ORGANIZATION(S) OF THE IMMEDIATE PROPERTY OWNER(S). ATTACH LETTER FROM LANDOWNER(S).

LANDOWNER SIGNATURE(S)

LANDOWNER(S) MUST SIGN AND DATE APPLICATION

5. WASTE HANDLING

AMOUNT OF WASTE HANDLED / PROCESSED / STORED

PROVIDE AN ESTIMATE OF THE DAILY WEIGHT (IN TONS) AND/OR VOLUME (IN CU YARDS/DAY) THAT WILL BE HANDLED AT THE FACILITY. INDICATE THE MAXIMUM AMOUNT OF WASTE THAT CAN BE STORED (IN CUBIC YARDS).

6. CERTIFICATION REQUIRED

CERTIFICATION

AFTER ALL DOCUMENTS HAVE BEEN COMPILED FOR SUBMISSION TO THE DIVISION, THE MANAGER OR OWNER RESPONSIBLE FOR THE SITE MUST SIGN THE CERTIFICATION AND GIVE DATE AND TITLE. THIS SIGNATURE MUST BE NOTARIZED.

RLA-18254 **R-26-3-403**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: ENGINEERING AND PUBLIC WORKS

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a real property agreement of sale with Connie and Daniel Gard for 4,211 sq. ft. of surplus right of way at 0 and 3304 Lobetti Road in the amount of $500.00. **(TO BE ADDED)** *(Engineering and Public Works)*

Attachments

Resolution

Real Property Agreement of Sale

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A REAL PROPERTY AGREEMENT OF SALE WITH CONNIE AND DANIEL GARD FOR 4,211 SQ. FT. OF SURPLUS RIGHT OF WAY AT 0 AND 3304 LOBETTI ROAD IN THE AMOUNT OF $500.00.

RESOLUTION: **R-26-3-403**

REQUESTED BY: **ENGINEERING & PUBLIC WORKS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County is the owner of surplus right of way located at 3304 Lobetti Road (Parcel ID 091-15904) containing approximately 2,452 square feet and 0 Lobetti Road (Parcel ID 091-15905) containing approximately 1,759 square feet, as more particularly described and shown on the attached Real Property Agreement of Sale (collectively, the "Property"); and

WHEREAS, Connie D. Gard and Daniel L. Gard desire to purchase the Property and the amount of $500.00 was agreed upon by the parties; and

WHEREAS, in accordance with Section 2-581(4) and Section 2-712(b)(3) of the Knox County Code, it is necessary for the Knox County Commission to approve the sale of the Property to Connie D. Gard and Daniel L. Gard.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Real Property Agreement of Sale with Connie D. Gard and Daniel L. Gard for 4,211 sq. ft. of surplus right of way property located at 0 and 3304 Lobetti Road is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Real Property Agreement of Sale with Connie D. Gard and Daniel L. Gard for 4,211 sq. ft. of surplus right of way property located at 0 and 3304 Lobetti Road shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that the Mayor of Knox County is authorized to execute the appropriate quit claim deed conveying the Property from Knox County, Tennessee to Connie D. Gard and Daniel L. Gard and is further authorized to execute any and all other documents which may be necessary to effectuate and complete said conveyance, subject to the review and approval of the Knox County Law Director's Office.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

REAL PROPERTY AGREEMENT OF SALE

THIS CONTRACT, entered into this _____ day of _____, 2026, between KNOX COUNTY, TENNESSEE ("Seller") and Connie D. Gard and Daniel L. Gard ("Purchaser").

WITNESSETH

Seller desires to sell and Purchaser desires to purchase, subject to the conditions hereinafter set out; the following described 4,211 sq. ft. (+/-) of right of way property located at 3304 Lobetti Road and 0 Lobetti Road in Knox County, Tennessee.

NOW THEREFORE for the good and valuable consideration of five hundred ($500.00) dollars and the covenants herein described, the parties agree as follows:

Commission Approval. This sales agreement is subject to the approval of the Knox County Commission.

Description. Approximately 2,452 sq. ft. (+/-) of right of way property of Parcel ID 091-15904 located at 3304 Lobetti Road and approximately 1,759 sq. ft. of right of way property of Parcel ID 091-15905 located at 0 Lobetti Road.

Purchase Price. Purchaser shall pay to Seller the total sum of five hundred ($500.00) dollars for the Property described above. Any taxes shall be prorated as of the date of closing.

Quit Claim Deed. In exchange for the purchase price, Seller shall execute and deliver to Purchaser a quit claim deed conveying Seller's interest in the Property to Purchaser.

Closing. The sale shall be closed sixty (60) days from the date of Commission approval. The purchase price is to be fully paid by cashier's check at closing.

Access to Property. Seller shall allow Purchaser reasonable access to the Property for purposes of conducting due diligence.

Governing Law; Venue. This Agreement shall be exclusively construed, governed, and controlled by the laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this Agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue, and inconvenient forum.

Indemnification/Hold Harmless. Purchaser shall indemnify, defend, save, and hold harmless Seller, its officers, agents, and employees from all suits, claims, actions, or damages of any nature brought because of, arising out of, or due to breach of this Agreement by Purchaser, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of Purchaser, its subcontractors, suppliers, agents, or employees.

Merger and Modification. This sales agreement contains the entire agreement between the parties. Any attempt to modify this agreement shall be contained in a writing signed by the Seller and Purchaser. The Seller and Purchaser acknowledge that they have read and understand this Agreement and have received a copy hereof.

APPROVED AND ACCEPTED this _____day of _____, 2026.

SELLER:

KNOX COUNTY, TENNESSEE

BY: _____
Glenn Jacobs
Knox County Mayor

PURCHASER:

Connie D. Gard

BY: _____
Signature

Daniel L. Gard

BY: _____
Signature

APPROVED AS TO LEGAL FORM:

KNOX COUNTY LAW DIRECTOR'S OFFICE

BY: _____

Date: _____

Contract No. _____

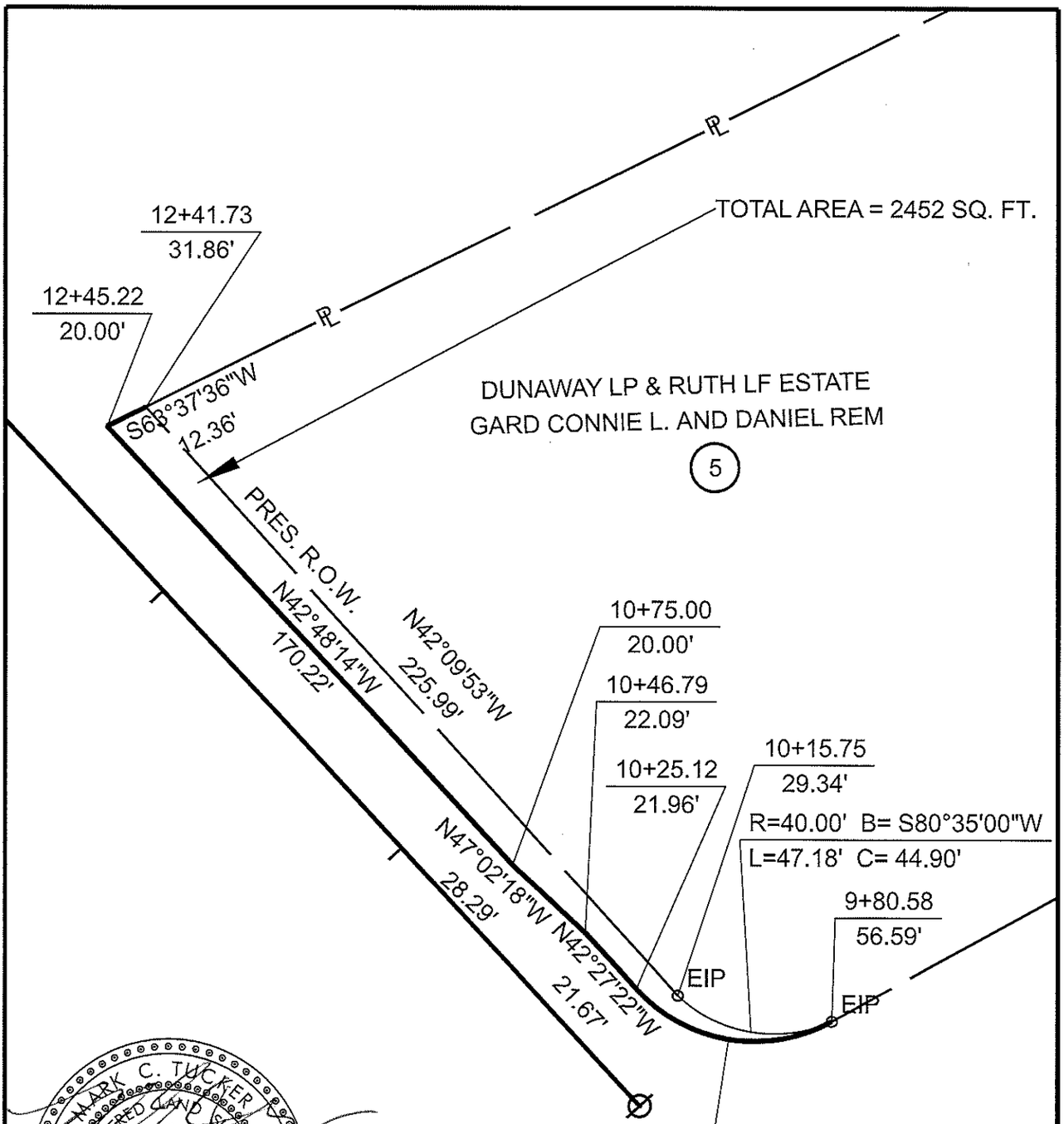
Situated in District W Six (6) of Knox County, Tennessee, and being more particularly described as follows:

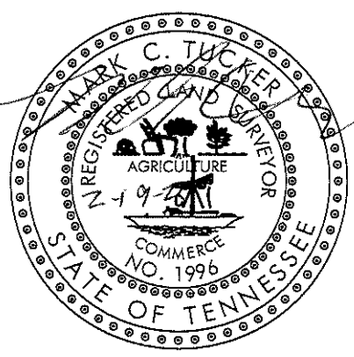
Legal Description Proposed Right-of-Way Tract No. 6

Gard Connie D & Gard Daniel L

Beginning at a point located in the Eastern Right-of-Way of Lobetti Rd and a point common with Gard Connie D & Gard Daniel L. and being 31.86 feet right of Sta. 12+41.73 of Proposed Lobetti Rd; thence with proposed Right-of-Way with a bearing and distance of South 63°37'36" West for 12.36 feet to a point 20.00 feet right of station 12+45.22 of Proposed Lobetti Rd; thence with proposed Right-of-Way with a bearing and distance of North 42°48'14" West for 149.84 feet to a point 20.00 feet right of station 13+95.07 of Proposed Lobetti Rd; thence with proposed Right-of-Way with a bearing and distance of North 50°49'19" East for 8.19 feet to a point 28.18 feet right of station 13+94.55 of Proposed Lobetti Rd; thence along the Right-of-Way South 42°24'32" East 25.94 feet to a point 28.00 feet right of station 13+68.61 of Proposed Lobetti Rd; thence along the Right-of-Way North 47°38'24" East 4.89 feet to a point 32.89 feet right of station 13+68.57 of Proposed Lobetti Rd; thence along the Right-of-Way South 42°20'17" East 126.85 feet to the point of beginning.

Containing 1,759 square feet, more or less.





THIS SURVEY WAS DONE UNDER THE AUTHORITY OF TCA 62-18-126 AND IS NOT A GENERAL PROPERTY SURVEY AS DEFINED UNDER RULE 0820-03-07

LEGEND

ROW LINE

PL PROPERTY LINE

PROPOSED ROW LINE

GRAPHIC SCALE 1"=40'

0 40 80

EXHIBIT

PROPOSED ROW

KNOX COUNTY

PROPERTY OF
DUNWAY LP & RUTH LF EST GARD
CONNIE L & DANIEL REM

TAX MAP: 91 DISTRICT W6 PARCEL: 159.04 KNOX CO., TN	MAP BOOK: 1643 PAGE NUMBER: 352

RGC&A
ROBERT G. CAMPBELL & ASSOC., LP
7523 TAGGART LANE, KNOXVILLE, TN 37938
(865) 947-5996

SCALE: 1"=40'	PROJ. NO. 25006 DATE: 2/19/26

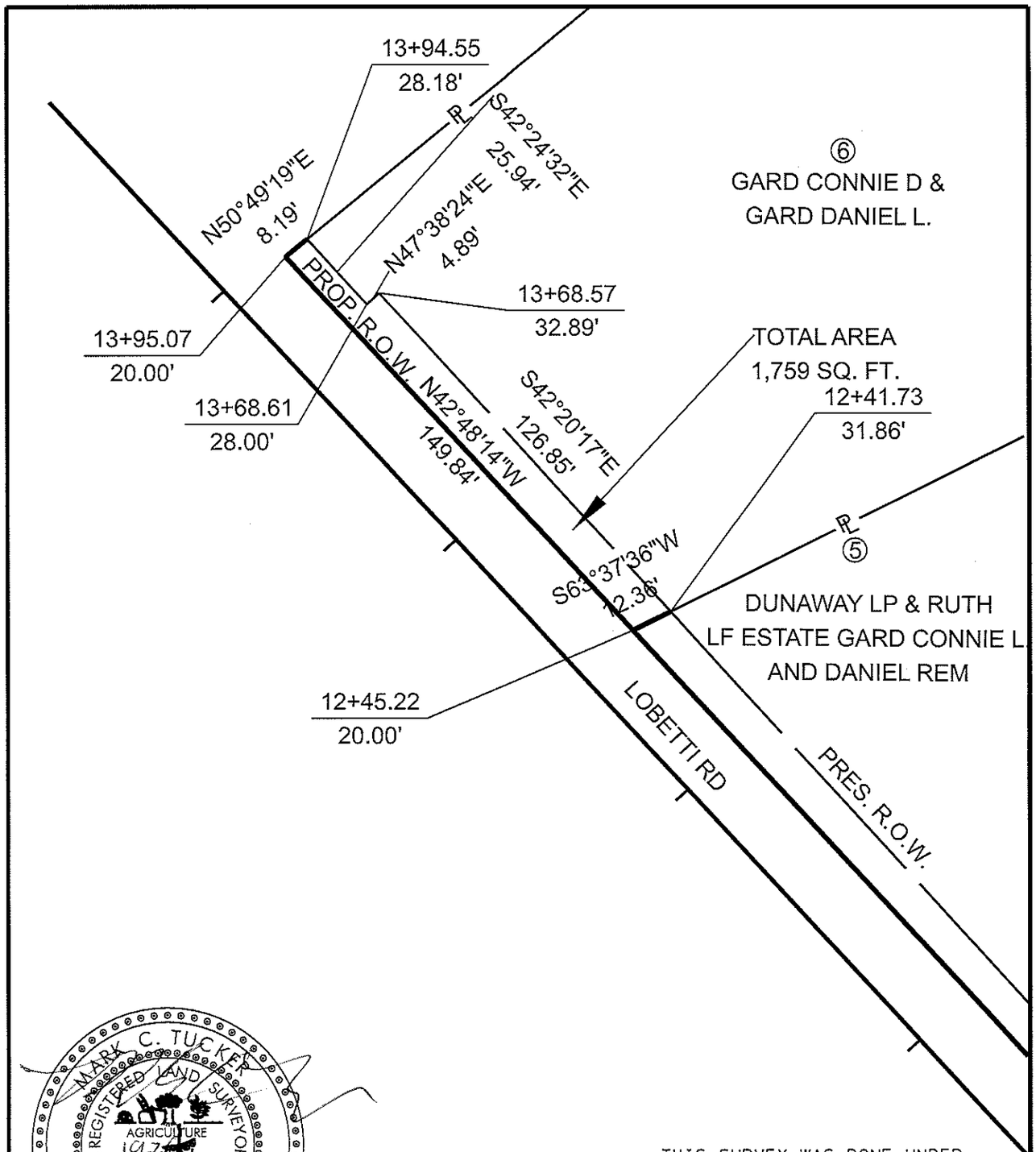
Situated in District W Six (6) of Knox County, Tennessee, and being more particularly described as follows:

Legal Description Proposed Right-of-Way Tract No. 5

Dunaway LP & Ruth LF Estate Gard Connie L. and Daniel Rem

Beginning at a point located in the Eastern Right-of-Way of Lobetti Rd and a point common with Dunaway LP & Ruth LF Estate Gard Connie L. and Daniel Rem and being 56.59 feet right of Sta. 9+80.58 of Proposed Lobetti Rd; thence with proposed Right-of-Way with a curve to the right, said curve having a radius of 45.00 feet and an arc length of 60.83 feet, having a chord bearing and distance of North 80°40'31" West for 56.42 feet to a point 21.96 feet right of Sta. 10+25.12; thence with proposed Right-of-Way with a bearing and distance of North 42°27'22" West for 21.67 feet; thence with proposed Right-of-Way with a bearing and distance of North 47°02'18" West for 28.29 feet; thence with proposed Right-of-Way with a bearing and distance of North 42°48'14" West for 170.22 feet; ; thence with proposed Right-of-Way with a bearing and distance of North 63°37'36" East for 12.36 feet; thence along the Right-of-Way South 42°09'53" East 225.99 feet to a point 29.34 feet right of station 10+15.75; thence along the Right-of-Way with a curve to the left, said curve having a radius of 40.00 feet and an arc length of 47.18 feet, having a chord bearing and distance of South 80°35'00" West for 44.90 feet to the point of beginning.

Containing 2,452 square feet, more or less.



THIS SURVEY WAS DONE UNDER THE AUTHORITY OF TCA 62-18-126 AND IS NOT A GENERAL PROPERTY SURVEY AS DEFINED UNDER RULE 0820-03-07

LEGEND

ROW LINE

PL PROPERTY LINE

PROPOSED ROW LINE

GRAPHIC SCALE 1"=40'

0 40 80

EXHIBIT

PROPOSED ROW

KNOX COUNTY

PROPERTY OF
GARD CONNIE D. & GARD DANIEL L.

TAX MAP: 91 DISTRICT W6 PARCEL: 159.05 KNOX CO., TN	MAP BOOK: 20200121 PAGE NUMBER: 0048031

RGC&A
ROBERT G. CAMPBELL & ASSOC., LP
7523 TAGGART LANE, KNOXVILLE, TN 37938
(865) 947-5996

SCALE: 1"=40'	PROJ. NO. 25006 DATE: 2/16/26

RLA-18253 **R-26-3-404**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COUNTY COMMISSION

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a construction contract in the amount of $278,752.00 with Stansell Electric Company, Inc. for the installation of a traffic signal at the intersection of Lovell Road (S.R. 131) and Gilbert Drive. **(TO BE ADDED)**

(Engineering and Public Works)

Attachments

Resolution

Construction Contract

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A CONSTRUCTION CONTRACT IN THE AMOUNT OF $278,752.00 WITH STANSELL ELECTRIC COMPANY, INC. FOR THE INSTALLATION OF A TRAFFIC SIGNAL AT THE INTERSECTION OF LOVELL ROAD (S.R. 131) AND GILBERT DRIVE.

RESOLUTION: **R-26-3-404**

REQUESTED BY: **ENGINEERING & PUBLIC WORKS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County is preparing for the installation of a traffic signal at the intersection of Lovell Road (S.R. 131) and Gilbert Drive (the "Project"); and

WHEREAS, the Knox County Procurement Division conducted a competitive bid process for construction of the Project and it has been determined that Stansell Electric Company, Inc. submitted the lowest responsible and responsive bid to perform the work; and

WHEREAS, the proposed construction contract with Stansell Electric Company, Inc. is in the amount of $278,752.00 and sets forth the terms and conditions for the undertaking of the Project; and

WHEREAS, Stansell Electric Company, Inc. has the necessary qualifications to perform the work for Knox County.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The construction contract with Stansell Electric Company, Inc. for the installation of a traffic signal at the intersection of Lovell Road (S.R. 131) and Gilbert Drive is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the construction contract with Stansell Electric Company, Inc. for the installation of a traffic signal at the intersection of Lovell Road (S.R. 131) and Gilbert Drive shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

SECTION 00500 – CONSTRUCTION CONTRACT

THIS CONTRACT, made this _____ day of _____ 20___ at Knox County, State of Tennessee by and between Knox County, Party of the First Part, hereinafter called the "Owner" and Stansell Electric Company, Inc., Party of the Second Part, hereinafter called the "Contractor".

WITNESSETH
In consideration of the mutual covenants and conditions hereinafter set forth, it is agreed as follows:

1. Statement of Work: This work shall include but not necessarily be limited to: construction of roadway improvements for **Construction of Traffic Signal at Lovell Road (S.R. 131) at Gilbert Drive (Knox County Bid Number 3706)**. This project consists of the addition of a traffic signal at the existing unsignalized intersection of Gilbert Drive at Lovell Road (S.R. 131). The scope of work generally includes the installation of proposed facilities including installation of strain poles, cabinet, controller, detection, signal heads, conduit, wiring, and incidentals to provide a fully functional traffic signal. Also included is the installation of pedestrian poles and the removal and installation of pavement markings.

2. Completion of Work: The Contractor shall commence work on the date to be specified in a written "Notice of Proceed" by the Owner and shall complete the project within the conditions as set forth in Special Provisions Section SP1, unless the period for completion is extended as hereinafter provided.

3. Contract Sum: The Owner shall pay the Contractor for the performance of said work, subject to additions and deductions provided herein two hundred seventy-eight thousand, seven hundred fifty-two and no/100 dollars ($278,752.00) as the contract bid in conformity with the bid schedules in Section 00300.

4. Payment: Payment shall be made to the Contractor for work performed under this contract for quantities of work as determined in accordance with this contract as set forth in Special Provisions, Section SP0.

5. Intent of Plans and Specifications: The Contractor will keep on the project a copy of the plans and specifications and shall at all times give the Owner access thereto. Anything mentioned in the specifications and not shown on the plans, or shown on the plans and not mentioned in the specifications, shall be of like effect as if shown or mentioned in both. In case of differences between the plans and specifications, the specifications shall govern. The Contractor shall not take advantage of any errors, discrepancies or omissions which may exist in the plans and specifications but shall immediately call them to the attention of the Engineer whose interpretation or correction thereof shall be conclusive.

6. Extra Work and Charges: Extra work shall be work for which no unit bid was received in the proposal and which was not included in the bid schedule and will be construed to mean work for which unit bids were received but which is in excess of the quantity mentioned in the proposal. The Owner, without invalidating the contract, may order extra work or make changes in the work, the contract sum being adjusted accordingly. All such work shall be executed under the conditions of the original contract except that any claim for extension of time caused thereby shall be adjusted at the time of ordering such change. All such changes shall be agreed to and recorded on "Contract Change Order" form. In giving instructions, the Engineer shall have authority to make minor changes in the work not involving extra cost and not inconsistent with

the purpose of the work, but otherwise, except in an emergency endangering life or property, no extra work or change shall be made unless covered by Contract Change Order, and no claim for an addition to the contract sum shall be valid unless so covered. Before becoming effective, all Change Orders must be signed by all parities indicated. In order to bind the County, if the change order is less than $100,000.00 the change order must be signed by the County Mayor. If, however, the change order is for an amount of $100,000.00 or more, the change order must be signed by the County Mayor and approved by County Commission. If the aggregate of the change orders to date total $99,999.99 then the next change order, regardless of amount, must be approved by the County Mayor and County Commission. Before becoming effective, all Change Orders must be signed by all parities indicated.

The value of such extra work or change shall be determined in one or more of the following ways:

(a) By estimate and acceptance in a lump sum.
(b) By unit prices named in the contract or subsequently agreed upon.

The above accounts shall be understood to include all other costs and compensation such as insurance, small tools, superintendence, office and overhead costs and profits. Rental on equipment shall be charged against the extra or changed work only for the actual time the equipment is used specifically therefore.

Changed work shall be adjusted, considering separately the work added and the parts omitted. Amount of adjustment for parts omitted shall be estimated at the time omission of work is authorized and the agreed adjustment will be deducted form the subsequent monthly estimates.

The Owner reserves the right to contract with any person or firm other than the Contractor for any or all extra work. The contractor's attention is especially called to the fact that he shall be entitled to no claim for damages for anticipated profits on any portion of work that may be omitted.

7. Claims for Extra Cost: If the Contractor claims that any changes in the work or any instructions by means of drawings or otherwise involve extra cost, he shall give the Engineer written notice thereof within a reasonable time after receipt of such instructions or of notice of such changes and, in any event, before proceeding to carry out such instructions or to put such changes into effect, except in case of an emergency endangering life or property. In all such cases the Contractor shall keep a correct account of the extra cost in such form as the Engineer may direct and shall present such account supported by receipts to the Engineer. The Owner shall be entitled to reject any claim for extra cost concerning which the foregoing procedure is not followed.

8. Performance and/or Payment Bond: The Contractor shall within thirty (30) days after the receipt of the Notice of Award and before the commencement of any operations hereunder execute the contract and furnish the Owner with a performance and/or payment bond in a sum equal to the amount of the contract price, conditioned upon the performance by the Contractor of all undertakings, covenants, terms, conditions, and agreements of this contract, and upon the prompt payment by the Contractor to all persons supplying labor and materials in the prosecution of the work provided by this contract. Such bond shall be executed by the Contractor and a corporate bonding company licensed to transact such business in the State of Tennessee and acceptable to the Owner. The expense of this bond shall be borne by the Contractor. All bonding companies must be listed in the Federal Register Dept. of the Treasury Fiscal Service, companies holding Certificates of Authority as acceptable sureties on Federal Bonds and as acceptable reinsuring companies. If at any time a surety on such bond becomes irresponsible or loses its right to do

business in the State of Tennessee, the Owner may require another surety which the Contractor shall furnish within ten (10) calendar days after receipt of written notice to do so.

Evidence of authority of any attorney in fact acting for the corporate surety must be provided in the form of a certificate terminated and remains in full force and effect on the date of the bond. The form of the bond shall be subject to approval by the Owner.

9. License and Permits: The Owner will secure and pay for permits required for permanent structures. The Contractor shall obtain and pay for all other necessary licenses and permits and shall faithfully comply with all laws, ordinances, and regulations Federal, State, or Local which may be applicable to the operations to be conducted hereunder.

10. Other Work: Wherever work being done by the Owner or by other contractors is contiguous to work covered by this contract, the interest involved of the parties shall be secured to protect the rights of the owner and to complete each work portion in general harmony.

11. Responsibility of the Engineer: The term "Engineer," wherever used in this Contract, shall be the person, firm, corporation, or representative of the Owner as its engineering representative during the course of construction. The Owner shall advise the Contractor in writing of the name and address of the Engineer. Notices of any change in the Engineer shall be given in writing by the Owner to the Contractor. The Engineer shall have full authority to interpret the plans and specifications and shall determine the amount, quality and acceptance of the work and supplies to be paid for under this Contract and every question relative to the fulfillment of the terms and provisions therein. Unless otherwise specifically provided in the specifications, all workmanship, equipment, and materials incorporated in the work are to be the best grade of their respective kinds for the purpose.

    It shall be the duty of the Engineer to enforce the specifications in a fair and unbiased manner, although he has the right to waive any term of the specifications if that term is found to be unreasonable and inconsistent with the general spirit of the specifications. If a variation from any requirement is allowed, the Engineer shall grant the same in writing with the reasons for his action outlined, and such action will not violate or change the contract in any other manner.

12. Waiver: It is expressly understood and agreed that any waiver granted by the Engineer of the Owner of any term, provision, or covenant of this contract shall not constitute a precedent nor breach of the same or any other terms, provisions, or covenants of this Contract. Any such waiver granted by the Engineer shall be made in writing and signed by all parties under this contract.

    Neither the acceptance of the work by the Owner nor the payment of all or any part of the sum due the Contractor hereunder shall constitute a waiver by the Owner of any claim which the Owner may have again the Contractor or surety under this contract or otherwise.

13. Superintendence: The Prime Contractor shall assign and provide a superintendent, who will be identified by name to the Owner. He will provide constant on-site supervision during any and all construction under the contract whether by the prime or a subcontractor. The superintendent shall have full authority to act for the Contractor and to carry all instructions given by the Engineer or Owner.

14. Labor Provisions: The Contractor and his subcontractors shall discharge, whenever ordered to do so by the Engineer, any employee who is disorderly or whose conduct in the opinion of the Engineer is detrimental to the prosecution of the work.

No person under the age of sixteen (16) years shall be employed.

The work shall at all times be prosecuted under safe working conditions and in a safe and workmanlike manner and the conditions of work shall be subject to inspection and correction by the Engineer or safety inspectors of the Owner.

15. Liability Insurance: The Contractor shall procure and maintain, at his own expense, during the life of the contract liability insurance as necessary to indemnify the Owner and his agents. All such insurance shall be subject to the approval of the owner for adequacy of protection, and shall contain a provision preventing cancellation without thirty (30) days prior written notice to the owner. The liability insurance will be that required in Contractor's General Public Liability and Property Damage Insurance issued to the Contractor and protecting him from all claims for destruction of or damage to property arising out of or in connection with any operations under this contract, whether such operations were performed by himself or by any other subcontractor under him or anyone directly or indirectly employed by the Contractor or by a Subcontractor under him.

All such insurance shall be written on a comprehensive policy form and in the event blasting operations are required in performance of the work shall cover all blasting operation. Certificates evidencing the issuance of such insurance shall be filled with the owner prior to the commencement of any operations under this contract.

16. Workmen's Compensation Insurance: The Contractor shall procure and maintain, at his own expense during the life of this contract in accordance with the provisions of the laws of the State of Tennessee, Workmen's Compensation Insurance for all of his employees at the site of the project, and in case any work is sublet, the Contractor shall require each subcontractor similarly to provide Workmen's Compensation Insurance for all the latter's employees unless such employees are covered by the protection afforded by the Contractor.

In case any class of employees engaged in work under this contract at the site of the project is not protected under Workmen's Compensation Insurance, the Contractor shall provide, and shall cause each subcontractor to provide, adequate and suitable insurance for the protection of these employees not otherwise protected.

Certification evidencing the issuance of such insurance shall be filed with the Owner prior to the commencement of any operations under this Contract.

17. Payment for Work Completed: See Special Provision regarding Payments to Contractor, Section SP0.

18. Payments Withheld: The Engineer may withhold or, on account of subsequently discovered evidence, nullify the whole or part of any estimate to such extent as may be necessary to protect the Owner from loss on account of:

(a) Defective work not remedied.
(b) Claims filed or reasonable evidence indicating probable filing or claims.
(c) Failure of the Contractor to make payments properly to subcontractors or for materials or labor.
(d) A reasonable doubt that the contract can be completed for the balance then unpaid.
(e) Damage to another Contractor.
(f) Failure of the Contractor to keep his work progressing in accordance with his time schedule.

When the above grounds are removed, payment shall be made for amounts withheld because of them.

19. Assignment and Transfer of Contract: The Contractor shall not assign or transfer this contract or any part thereof or any interest therein without the consent in writing of the Owner and the Contractor's surety and any such assignment or transfer without such written consent shall be null and void.

20. Indemnity: The Contractor shall indemnify and hold harmless the Owner, the Owner's agent and employees from and against all losses and all claims, demands, payments, suits, or action recoveries and judgments of every nature and description brought or recovered against them by reason of any act or omission of the said Contractor, his agents or employees in the execution of the work or in guarding the same.

21. Subcontractors: The Contractor shall cause appropriate provisions to be inserted in all subcontracts relating to the work to insure the fulfillment of all the provisions of this contract affecting subcontractors.

22. Protection of work and property: The Contractor shall continuously maintain adequate protection of all his work and materials from damage or theft and shall protect the Owner's property and all adjacent property from injury or loss arising in connection with activities under this contract. The Contractor shall make good any such damage, injury, or loss, except such as may be directly due to errors in the Contract Documents or such as may be caused by agents or employees of the Owner.

The Contractor shall take, use, and maintain all necessary precautions, safeguards, and protection to prevent accidents on the site of the work. The Contractor shall post danger signs warning against any hazards created by the work being done under this contract. He shall designate a responsible member of his organization on the work, whose duty shall be the prevention of accidents, and the name of the person so designated shall be reported to the Engineer and Owner in writing. In an emergency affecting the safety of life, or of the work or adjoining property, the Contractor without special instruction or authorization from the Engineer or Owner is hereby permitted to act, at his discretion, to prevent such threatened loss or injury, and he must take such action if so instructed or authorized by the Engineer or Owner.

Additionally, in order to further protect the lives and health of his employees under the contract, the Contractor shall comply with all pertinent provisions of the "Manual of Accident Prevention in Construction" issued by the Associated General Contractors of America, Inc. and shall maintain an accurate record of all cases of death, occupational disease, and injury requiring medical attention or causing loss of time from work under the contract.

The Contractor shall also protect property as required by law.

23. Land of Owner, Use of, by Contractor: The Owner shall provide the land upon which the work under this Contract is to be done, and will so far as is convenient, permit the Contractor to use as much of this land as is required for the erection of temporary construction facilities and storage of materials, together with the right of access to same, but beyond this, the Contractor shall provide, at his cost and expense, any additional land required.

24. Liens: If at any time there shall be evidence of lien or claim for which the Owner might become liable and which is chargeable to the Contractor, the Owner shall have the right to retain out of any payment then due or thereafter to become due, an amount sufficient to complete indemnification against such lien or claim. In the event the Owner has already paid to the

Contractor all sums due under this contract or the balance remaining unpaid is insufficient to protect the Owner, the Contractor and his surety shall be liable to the Owner for any loss so sustained.

25. Construction Staking: The Contractor will provide the necessary construction staking for the fulfillment of this contract. If re-staking of reference stakes provided by the Owner/Engineer is required due to negligence of the Contractor or his subcontractors, the cost of re-staking will be borne by the Contractor.

26. Preservation of Stakes: The Contractor and his subcontractors shall carefully preserve bench marks, reference points and stakes, and in case of willful or careless destruction, he will absorb the charge of the resulting expense and shall be responsible for any mistakes that may be caused by their unnecessary loss or disturbance.

27. Inspection: The Contractor shall do all work to the approval of the inspector. The inspector's daily log and weekly project progress video will constitute the construction record for the project. The Engineer and the Owner shall at all times have access to the work during its construction and shall be furnished with every reasonable facility for ascertaining that the stock and materials used and employed, and the workmanship are in accordance with the requirements and intentions of the specifications. All work done and all materials furnished shall be subject to their inspection and approval.

    The inspection of the work shall not relieve the Contractor of any of his obligations to fulfill his contract as prescribed and defective work shall be made good and unsuitable materials shall be rejected, notwithstanding that such defective work and materials have been previously overlooked and accepted on estimates for payment. Materials of construction shall be subject to inspection and testing to establish conformance with specifications and suitability for uses intended. All work and material shall be tested to the satisfaction of the Engineer and the Owner before acceptance. The Engineer and Owner shall be provided copies of all testing performed for the project.

    No work shall be done at night without the previous approval of the Engineer.

28. Minimize Siltation: The Contractor, at his own expense, will be required to minimize siltation and bank erosion during construction and to restore disturbed areas to present or better conditions.

29. Defective Work or Material: The Contractor shall promptly remove from the premises all work and materials condemned by the Engineer as failing to conform to the contract, whether incorporated or not, and the contractor shall promptly replace and re-execute his own work in accordance with the Contract and without expense to the Owner and shall bear the expense of making good all work of other contractors destroyed or damaged by such removal or replacement.

30. Other Contracts: The Owner may award other contracts. The Contractor shall fully cooperate with such other Contractors and carefully fit his work to that provided under other contracts as may be directed by the Engineer. The Contractor shall be liable for any act which will damage or interfere with the performance of work by any other Contractor.

31. Owner's Right To Take Over the Work: If the Contractor should be adjudged bankrupt, or if he should make a general assignment for the benefit of his creditors, or if a receiver should be appointed to take over his affairs, or if he should fail to prosecute his work with due diligence and carry the work forward in accordance with his work schedule and the time limits set forth in the

Contract Documents, or if he should fail to substantially perform one or more of the provisions of the Contract Documents to be performed by him, the Owner may serve written notice on the Contractor and the surety on his performance bond, stating its intention to exercise one of the remedies hereinafter set forth and the grounds upon which the Owner bases its right to exercise such remedy.

In any event, unless the matter complained of is satisfactorily cleared within ten (10) days after service of such notice, the Owner may, without prejudice to any other right or remedy, exercise one of such remedies, at once, having first obtained a certificate from the Engineer that sufficient cause exists to justify such action.

(a) The Owner may terminate the services of the Contractor, which termination shall take effect immediately upon service of notice thereof on the Contractor and his surety, where upon the surety shall have the right to take over and perform the contract. If the surety does not commence performance of the contract within ten (10) days after service of the notice of termination, the Owner may itself take over the work, take possession of and use all materials, tools, equipment, and appliances on the premises and prosecute the work to completion by such means as it shall deem best. In the event of such termination of his service, the Contractor shall not be entitled to any further payment under this contract until the work is completed and accepted. If the Owner takes over the work and if the unpaid balance of the contract price when the owner takes over the work, exceeds the cost of completing the work, including compensation for any damages or expenses incurred by the Owner thought the default of the Contractor, such excess shall be paid to the Contractor. In such event, if such cost, expenses, and damages shall exceed such unpaid balance of the contract price, the Contractor and his surety shall pay the difference to the Owner. Such cost, expenses and damages shall be certified by the Engineer.

(b) The Owner may take control of the work and either make good the deficiencies of the Contractor itself or direct the activities of the Contractor in doing so, employing such additional help as the Owner deems advisable. In such event the Owner shall be entitled to collect from the Contractor and his surety, or to deduct from any payment then or thereafter due the Contractor, provided the Engineer approved the amount thus charged to the Contractor.

(c) The Owner may require the surety on the Contractor's bond to take control of the work at once and see to that all deficiencies of the Contractor are made good with due diligence. As between the Owner and the surety, the cost of making good such deficiencies shall all be borne by the surety. If the surety takes over the work, either upon termination of the services of the Contractor or upon instructions from the Owner to do so, the provisions of the Contract Documents shall govern in respect to the work done by the surety, the surety being substituted for the Contractor as to such provisions, including provisions as to payment for the work and provisions of this section as to the right of the Owner to do the work itself or to take control of the work.

32. Contractor's Right To Stop Work or Terminate Contract: If the work shall be stopped under an order of any court or other public authority for a period of three (3) months through no act or fault of the Contractor or anyone employed by him, then the Contractor may on seven (7) day's written notice to the Owner and the Engineer stop work or terminate this contract and recover from the Owner payment for all work executed, and losses sustained on any plant or material, and a reasonable profit. If the Engineer shall fail to issue any certificate for payment within ten (10) days after it is due, or if the Owner shall fail to pay the Contractor within fifteen (15) days after its maturity and presentation any sum certified by the Engineer, then the Contractor may on seven (7) day's written notice to the Owner and to the Engineer stop work and give written notice of intention to terminate this contract. If the Owner shall thereafter fail to pay the Contractor within seven (7) day's after receipt of such notice, then the Contractor may terminate the contract and

recover from the Owner payment for all work executed, and losses sustained upon any plant or materials, and a reasonable profit.

33. Delays and Extension of Time: If the Contractor be delayed at any time in the progress of the work by an act or neglect of the Owner or the Engineer, or if any employee of either, or by any separate Contractor employed by the Owner, or by changes ordered in the work, or by strike, lockouts, fire, unusual delay in transportation, unavoidable causalities, or any causes beyond the Contractor's control, or by delay authorized by the Engineer, or by any cause which the Engineer shall decide to justify the delay, then the time of completion shall be extended for such reasonable time as the Engineer may decide. No such extension shall be made for delay occurring more than seven (7) days before claim therefore is made in writing to the Engineer. In the case of a continued cause of delay, only one (1) claim is necessary.

34. Right of Occupancy: The Owner shall have the right, if necessary, to take possession of and to use any completed or partially completed portion of the work, if such use be approved by the Engineer even if the time for completing the entire work or such portions of the work has not expired and even if the work has not been finally accepted. Such possession and use shall not constitute an acceptance of such portions of the work. The Owner shall not have the right of such possession and use if it materially interferes with the Contractor's operations. The Owner shall also have the right to enter the premises for the purpose of doing work not covered by its contract with the Contractor.

35. Underground Obstructions: The Contractor shall anticipate all underground obstructions such as water lines, gas lines, sewer lines, utility lines, concrete and debris. No extra payment will be allowed for the removal, replacement, repair or possible increased cost caused by underground obstructions. Any such lines or obstructions indicated on the map show only the approximate location and must be verified in the field by the Contractor. The Owner and Engineer will endeavor to familiarize the Contractor with all known underground utilities and obstructions, but this will not relieve the Contractor from full responsibility in anticipating all underground obstructions. All excavation shall be done in accordance with TCA 65-31-102, "Underground Utility Damage Prevention."

36. Acceptance: Final inspection and acceptance of the work shall be made by the Engineer in collaboration with the Owner. Such inspection shall be made as soon as practical after the Contractor has notified the Owner in writing that the work is ready for such inspection.

37. Final Estimates: Upon completion and acceptance of the work the Engineer shall issue a certificate that the whole work provided for in this contract has been completed and accepted by him under the conditions and terms thereof, and shall make the final estimate of the work. The final estimate of work must be checked and approved by the Engineer for the Owner; whereupon, the entire balance found to be due the Contractor, including said retained percentage but excepting such sums as may be retained lawfully by said Owner that all payrolls, material bills and outstanding to the Owner indebtedness in connection with this contract have been paid.

38. Cleaning Up: Upon completion or termination of the work, the Contractor shall, as directed by the Engineer, remove from the vicinity of the work all equipment and all temporary structures, waste materials, and rubbish from his operations, leaving the premises in a neat and presentable condition. In the event of his failure to do so, the same may be done by the Owner at the expense of the Contractor, and his surety shall be responsible therefore.

39. Guarantee and Correction of Work After Final Payment: Neither the final certificate nor payment nor any provisions in the Contract Documents shall relieve the Contractor of responsibility for faulty materials or workmanship and, unless otherwise specified, he shall remedy any defects due

thereto and pay for any damage to other work resulting therefrom, which shall appear within a period of three (3) years from the date of final acceptance of the work by the Owner. The Owner shall give notice of observed defects with reasonable promptness. All questions arising under this article shall be decided by the Engineer.

The Contractor and through him each subcontractor, in accepting the contract for this construction or respective portions of the construction covered by these plans and specifications, does hereby agree to replace and make good, without expense to the Owner, any work or material which may be found to be defective within three (3) years from the date of the final certificate of payment to said Contractor. The deterioration due to ordinary use and normal wear is excluded from this guarantee. This guarantee shall include damage done by settlement of backfills, such damage and sinking of backfills being considered as defective workmanship. Backfilled areas that are unpaved shall be refilled if the filled material settles more than two inches (2") below original grade.

The Contractor shall reimburse the Owner for cost of damage if any, as well as cost of replacing defective materials or workmanship.

If replacement is not made within ten (10) days after notice is given of such defect in workmanship, or thirty (30) days in case of materials, then the Owner shall have the right to make replacements and charge cost of same to Contractor or his bondsman.

40. The Contractor shall comply with the Department of Labor Safety and Health Regulations for construction promulgated under the Occupational and Health Act of 1970 (O4PL 91-596) and under Section 107 of the Contract Work House and Safety Standards Act (PL 92-54). The Contractor shall comply with the Occupational Safety and Health Act for Construction Industry (29 CFB Part 1926) under Section #s 650-652.

41. All chemicals used during project construction or furnished for project operation, whether herbicide, pesticide, disinfectant polymer, reactant, or of other classification, must show approval of either EPA or USDA. Use of all such chemicals and disposal or residues shall be in strict conformance with instructions.

42. Safety: Contractor will ensure that its employees observe and exercise all necessary caution and discretion so as to avoid injury to person or damage to property of any and all kinds.

All buildings, appurtenances and finishings shall be protected by the Contractor from damage, which might be done or caused by work performed under this contract. Such damages to the foregoing shall be repaired and/or replaced by approved methods so as to restore the damaged areas to their original condition at the expense of the Contractor.

The Contractor shall erect, install, and maintain all temporary public walks, warning signs, barricades, and other protective means as may be necessary for the protection of the public from injury. The Contractor shall assume all responsibility for properly securing the work area for the safety of its employees, school staff, students and general public.

43. KNOX COUNTY OBLIGATIONS, RIGHTS AND REMEDIES

These terms and conditions shall be part of the contract. Knox County reserves the right to negotiate other terms and conditions it deems appropriate and necessary under the circumstances to protect the public trust.

a. ALTERATIONS OR AMENDMENTS: No alterations, amendments, changes, modifications or additions to this Contract shall be binding on Knox County without the prior written approval of the County.

b. APPROPRIATION: In the event no funds are appropriated by Knox County for the goods or services in any fiscal year or insufficient funds exist to purchase the goods or services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

c. ASSIGNMENT: Contractor shall not assign or sub-contract this agreement, its obligations or rights hereunder to any party, company, partnership, incorporation or person without the prior written specific consent of Knox County.

d. BOOKS AND RECORDS: Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices at all reasonable times during the contract period and for five (5) years from the date of the final payment under this agreement for inspection by County or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this agreement.

e. CHILD LABOR: Contractor agrees that no products will be provided or used under this Contract which have been manufactured or assembled by child labor.

f. COMPLIANCE WITH ALL LAWS: Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of goods and/or services, and all instructions and prohibitive orders issued regarding this work and shall obtain all necessary permits.

g. DEFAULT: If Contractor fails to perform or comply with any provision of this contract or the terms or conditions of any documents referenced and made a part hereof, Knox County may terminate this contract, in whole or in part, and may consider such failure or noncompliance a breach of contract. Knox County expressly retains all its rights and remedies provided by law in case of such breach, and no action by Knox County shall constitute a waiver of any such rights or remedies. In the event of termination for default, Knox County reserves the right to purchase its requirements elsewhere, with or without competitive bidding.

h. GOVERNING LAW; VENUE: This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses base on personal jurisdiction, venue and inconvenient forum.

i. INCORPORATION: All specifications, drawings, technical information, invitation to bid, bid, award and similar items referred to or attached or which are the basis for this contract are deemed incorporated by reference as if set out fully herein.

j. INDEMNIFICATION/HOLD HARMLESS: Contractor shall indemnify, defend, save and hold harmless and pay on behalf of Knox County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of

the agreement by Contractor, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of Contractor, its subcontractors, suppliers, agents or employees.

k. INDEPENDENT CONTRACTOR: Contractor shall acknowledge that it and its employees serve as independent contractors and that Knox County shall not be responsible for any payment, insurance or incurred liability.

l. INSPECTION AND ACCEPTANCE: Warranty periods shall not commence until Knox County inspects and formally accepts the goods and/or services. The terms, conditions and timing of acceptance shall be determined by Knox County. Knox County reserves the right to reject any or all items or services not in conformance with applicable specifications, and Contractor assumes the costs associated with such nonconformance. Acceptance of goods or services does not constitute a waiver of latent or hidden defects or defects not readily detectable by a reasonable person under the circumstances.

m. IRAN DIVESTMENT ACT: By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each respondent is not on the list created pursuant to Tennessee Code Annotated § 12-12-106. All respondents must complete and submit with their bid the attached Affidavit of Compliance with Iran Divestment Act.

n. LIMITATIONS OF LIABILITY: In no event shall Knox County be liable for any indirect, incidental, consequential, special or exemplary damages or lost profits, even if Knox County has been advised of the possibility of such damages.

o. NO BOYCOTT OF ISRAEL: Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by submission of a response to this solicitation, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each bidder is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel. All respondents must complete and

p. NON-DISCRIMINATION AND NON-CONFLICT STATEMENT: Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin or any individual trait or characteristic found to be an illegal consideration, shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this agreement, or in the employment practices of Vendor. Contractor shall upon request show proof of such non-discrimination and shall post in conspicuous places available to all employees and applicants notices of non-discrimination. Contractor covenants that it complies with the Fair Wage and Hour Laws, the National Labor Relations Act, and other Federal and State employment laws as applicable. Contractor covenants that it does not engage in any illegal employment practices.

Contractor covenants that it has no public or private interest, and shall not acquire directly or indirectly any interest, that would conflict in any manner with the provision of its goods or performance of its services. Contractor warrants that no part of the total Contract amount provided herein shall be paid directly or indirectly to any officer or employee of Knox County as wages, compensation, or gifts in exchange for acting as officer, agent, employee, subcontractor or consultant to Contractor in connection with any good provided or work contemplated or performed relative to the agreement.

q. ORDER OF PRECEDENCE: In the event of inconsistent or conflicting provision of this Contract and referenced documents, the following descending order of precedence shall prevail: (1) Item Description, (2) Invitation to Bid, (3) Bid, (4) Award, (5) Special Terms and Conditions, (6) General Terms and Conditions, (7) Specifications, (8) Drawings.

r. REMEDIES: Knox County shall have all rights and remedies afforded under the U.C.C. and Tennessee law in contract and in tort, including but not limited to rejection of goods, rescission, right of set-off, refund, incidental, consequential and compensatory damages and reasonable attorney's fees.

s. RIGHT TO INSPECT: Knox County reserves the right to make periodic inspections of the manner and means the service is performed or the goods are supplied.

t. SEVERABILITY: If any provision of this Contract is declared illegal, void, or unenforceable, the remaining provisions shall not be affected but shall remain in force and in effect.

u. TAX COMPLIANCE: Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its bid and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

v. TERMINATION: County may terminate this agreement with or without cause at any time. In the event of termination by either party, fees due for services satisfactorily performed or goods accepted prior to the termination date shall be paid.

w. WARRANTY: Contractor warrants to Knox County that all items delivered, and all services rendered shall conform to the specifications, drawings, bid and/or other descriptions furnished and/or incorporated by reference, and will be fit for the particular purpose purchased, of merchantable quality, good workmanship, and free from defects. Contractor extends to Knox County all warranties allowed under the U.C.C. Contractor shall provide copies of warranties to the County. Return of merchandise not meeting warranties shall be at contractor's expense.

x. CONSTRUCTION PROJECTS: Any construction undertaking, for which the total cost of the project is Twenty-Five Thousand Dollars ($25,000) or more, is subject to the "Contractors Licensing Act of 1994." In accordance with the Act, no bid will be opened unless the outside of the sealed envelope containing the bid provides the following information: the Contractor's license number, the date of the license's expiration, and a dollar quotation of that part of his classification applying to the bid. In addition, each HVAC, plumbing, and electrical subcontractor's license number, date of the license expiration and that part of each classification applying to the bid if the value of the work is Twenty-Five Thousand Dollars ($25,000) or greater, must be annotated.

If the value of the subcontractor's work is less than Twenty-Five Thousand Dollars ($25,000), the bid envelope is to be annotated with the phrase "Subcontractor's Bid is Less Than $25,000" after each appropriate heading. In the case of joint ventures, this information must be provided by each party submitting the bid. If no subcontractors are being used, the outside of the envelope must state, "No Subcontractors are being used on this project." All bids must be submitted in one envelope; use the Bid Envelope Cover provided with the Invitation for Bids.

y. BID ENVELOPE COVER: Vendors must attach the bid envelope cover sheet to their submittal envelope. Complete all blanks on the cover. Insert "not applicable" if the category does not apply. Bids received without the envelope cover sheet information will not be considered.

z. INSURANCE CHECKLIST: Vendors and their insurance agent(s) must sign the attached Insurance Checklist form and submit it with their bid. This serves as proof that the vendor can and will obtain and maintain the insurance required for this project. It shall be the awarded vendor's responsibility to maintain a current Certificate of Insurance, including Endorsement Page(s), on file with Knox County Procurement for the duration of the contract.

This Contract shall be binding upon the parties hereto and their respective heirs, executors, administrators, successors and assigns.

44. WORK BY UTILITIES: During the life of the contract, local utilities and Knox County may install or adjust their respective utilities in the project area and work shall be performed by the contractor in cooperation with the utilities. The contractor shall be responsible for the coordination of his work with the respective utility owner.

Any cost of relocation of the utility during construction such as power poles, etc., to facilitate the work of the contractor for the convenience of the contractor shall be borne by the contractor.

IN WITNESS WHEREOF, the parties hereto have caused these presents to be executed the day and year first above written.

ATTEST

Knox County
Owner

BY: _____

BY: _____

TITLE: _____

TITLE: Mayor

ATTEST

Stansell Electric Company, Inc.
Contractor

BY: _____

BY: _____

TITLE: _____

TITLE: _____

Contract #: _____

Approved as to Legal Form:

_____
Knox County Law Director

_____
Date

END OF SECTION 00500

RLA-18252 **R-26-3-405**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: ENGINEERING AND PUBLIC WORKS

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the necessary right-of-way and temporary construction easement acquisitions on three (3) tracts for the Bakertown Road and Joe Hinton Road realignment project. **(TO BE ADDED)**

(Engineering and Public Works)

Attachments

Resolution

ROW

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING THE NECESSARY RIGHT-OF-WAY AND TEMPORARY CONSTRUCTION EASEMENT ACQUISITIONS ON THREE (3) TRACTS FOR THE BAKERTOWN ROAD AND JOE HINTON ROAD REALIGNMENT PROJECT.

RESOLUTION: **R-26-3-405**

REQUESTED BY: **ENGINEERING & PUBLIC WORKS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County has determined the need for the realignment of Bakertown Road and Joe Hinton Road (the "Project"); and

WHEREAS, in furtherance of the Project, the Knox County Commission's approval of the acquisition of temporary construction easements and/or right-of-way on three (3) tracts is necessary.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Commission of Knox County hereby approves and authorizes Knox County to acquire the necessary right-of-way and temporary construction easements on three (3) tracts for the Bakertown Road and Joe Hinton Road realignment project, as identified on the plans attached hereto and incorporated herein by reference.

BE IT FURTHER RESOLVED, that the use of eminent domain to acquire said easements and right-of-way is hereby authorized if necessary.

BE IT FURTHER RESOLVED, that the Knox County Mayor is hereby authorized to execute any and all documents which may be necessary to acquire right-of-way and/or temporary construction easements on the identified tracts for the Project, subject to the review and approval of the Knox County Law Director.

BE IT FURTHER RESOLVED, that the Knox County Commission understands that this Resolution authorizes the acquisition of right-of-way and/or temporary construction easements on three (3) tracts for the Bakertown Road and Joe Hinton Road realignment project and that the area to be acquired is subject to change and any such change shall not require the approval of the Knox County Commission. It shall only be necessary for the Knox County Commission to approve easement and/or right-of-way acquisitions on any additional tracts not already identified on the plans attached hereto and approved herein.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

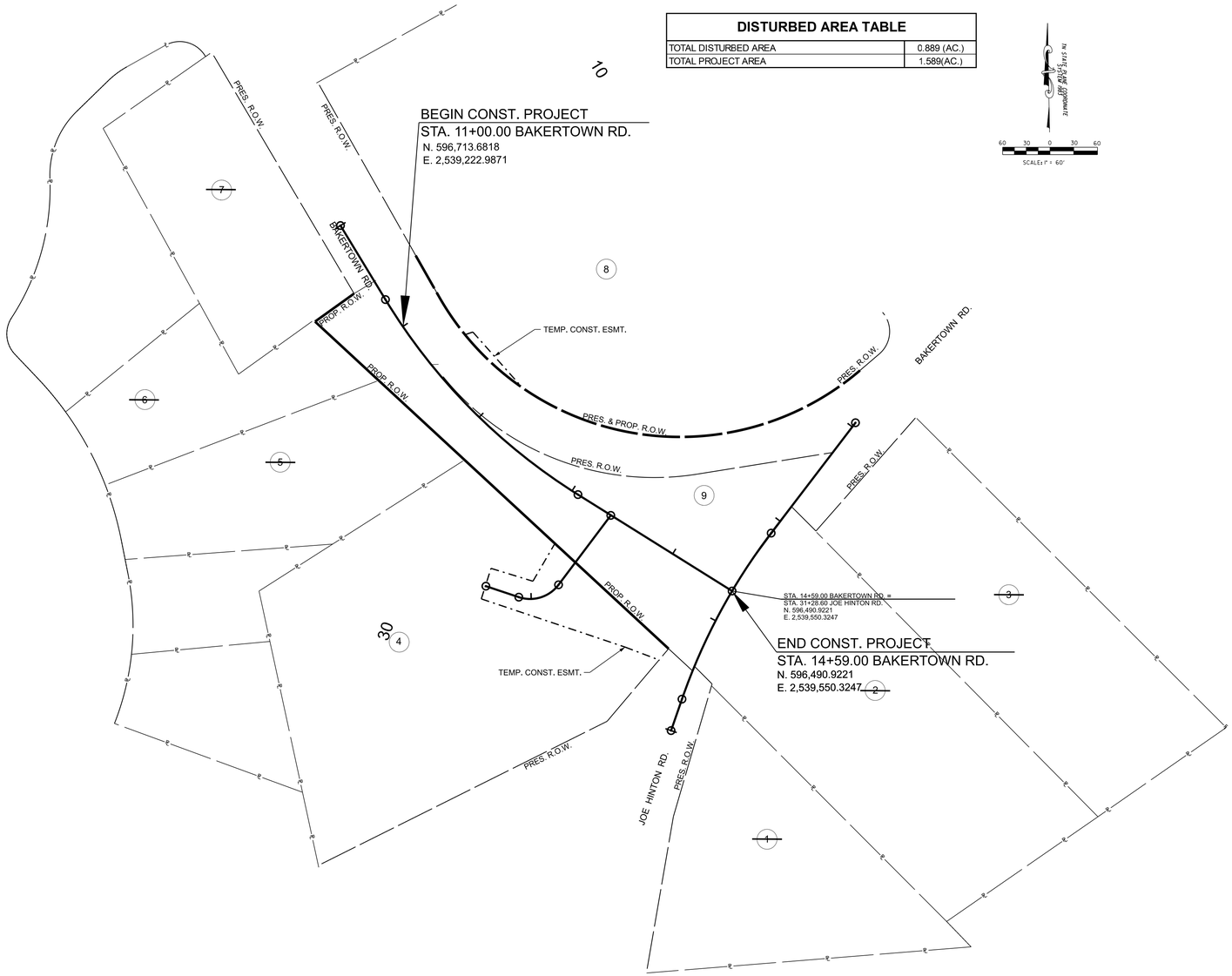
County Mayor Date

TYPE	YEAR	PROJECT NO.	SHEET NO.
CONST.	2026	3889500	3A

R.O.W. ACQUISITION TABLE

TRACT NO.	PROPERTY OWNERS	COUNTY RECORDS				TOTAL AREA (ACRES)			AREA TO BE ACQUIRED (ACRES)			AREA REMAINING (ACRES)		EASEMENT (S.F.)	
		TAX MAP NO.	PARCEL NO.	DEED DOCUMENT REFERENCE											
				BOOK	PAGE	LEFT	RIGHT	TOTAL	LEFT	RIGHT	TOTAL	LEFT	RIGHT	PERMANENT SLOPE	TEMPORARY CONSTRUCTION
1	DEBRA A. & RANDALL BURNHAM	105	188	20210324	0077905	0	0.76	0.76					0.76		
2	ANTHONY & CHELSEA CAMPBELL	105	189	20180321	0055543	0	1.19	1.19					1.19		
3	TERRY & BRENT SMILEY	105	20201	20220425	0081307	0	1.04	1.04					1.04		
4	CECIL E. & REBA K. BROWN	105	191	1656	1049	0	1.53	1.53					1.53		5815
5	SEAN & BRITTANY HAGSTROM	105	CH029	20200311	0059986	0	0.59	0.59					0.59		
6	MATTHEW & MARLEE SANDERS	105	CH030	20170706	0000962	0	0.42	0.42					0.42		
7	KAREN V. & ROBERT B. PRICE JR.	105	194	20240513	0056471	0	0.61	0.61					0.61		
8	SREIT EAGLE POINTE APARTMENTS LLC	105	DE001	20211222	0049706	9.33	0	9.33				9.33			283
9	MICHAEL C. & JANET BELITZ	105	190	20170516	0069702	0.47	0.29	0.76	0.47	0.29	0.76	0.00	0.00		
ACQUISITION TOTALS (ACRES)											**0.760**				6098

DISTURBED AREA TABLE	
TOTAL DISTURBED AREA	0.889 (AC.)
TOTAL PROJECT AREA	1.589(AC.)



KNOX COUNTY, TN

RIGHT-OF-WAY ACQUISITION TABLE, AND PROPERTY MAP

SCALE: 1" = 60'

BARGE DESIGN SOLUTIONS

520 West Summit Hill Drive // Suite 1202 // Knoxville, Tennessee 37902
PHONE (865) 637-2810 // FAX (865) 673-8554

1/23/2026 2:35:26 PM
F:\38\38895\388950\04_CAD\TRNS\ROW AQUISITION.DGN

RLA-18251 **R-26-3-406**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Drucilla Stills, COUNTY COMMISSION
Department:	ENGINEERING AND PUBLIC WORKS
Requires Expenditure of Funds:	Funded in Current Budget:
Appropriation Required:	

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the necessary right-of-way acquisitions on three (3) tracts for the installation of a traffic signal at the intersection of Schaad Road and Johnson Road. **(TO BE ADDED)**
(Engineering and Public Works)

Attachments

Resolution
ROW

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING THE NECESSARY RIGHT-OF-WAY ACQUISITIONS ON THREE (3) TRACTS FOR THE INSTALLATION OF A TRAFFIC SIGNAL AT THE INTERSECTION OF SCHAAD ROAD AND JOHNSON ROAD.

RESOLUTION: **R-26-3-406**

REQUESTED BY: **ENGINEERING & PUBLIC WORKS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County has determined the need to install a traffic signal at the intersection of Schaad Road and Johnson Road (the "Project"); and

WHEREAS, in furtherance of the Project, the Knox County Commission's approval of the acquisition of right-of-way on three (3) tracts is necessary.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Commission of Knox County hereby approves and authorizes Knox County to acquire right-of-way on three (3) tracts for the installation of a traffic signal at the intersection of Schaad Road and Johnson Road, as identified on the plans attached hereto and incorporated herein by reference.

BE IT FURTHER RESOLVED, that the use of eminent domain to acquire said right-of-way is hereby authorized if necessary.

BE IT FURTHER RESOLVED, that the Knox County Mayor is hereby authorized to execute any and all documents which may be necessary to acquire right-of-way on the identified tracts for the Project, subject to the review and approval of the Knox County Law Director.

BE IT FURTHER RESOLVED, that the Knox County Commission understands that this Resolution authorizes the acquisition of right-of-way on three (3) tracts for the Project and that the area to be acquired is subject to change and any such change shall not require the approval of the Knox County Commission. It shall only be necessary for the Knox County Commission to approve easement and/or right-of-way acquisitions on any additional tracts not already identified on the plans attached hereto and approved herein.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

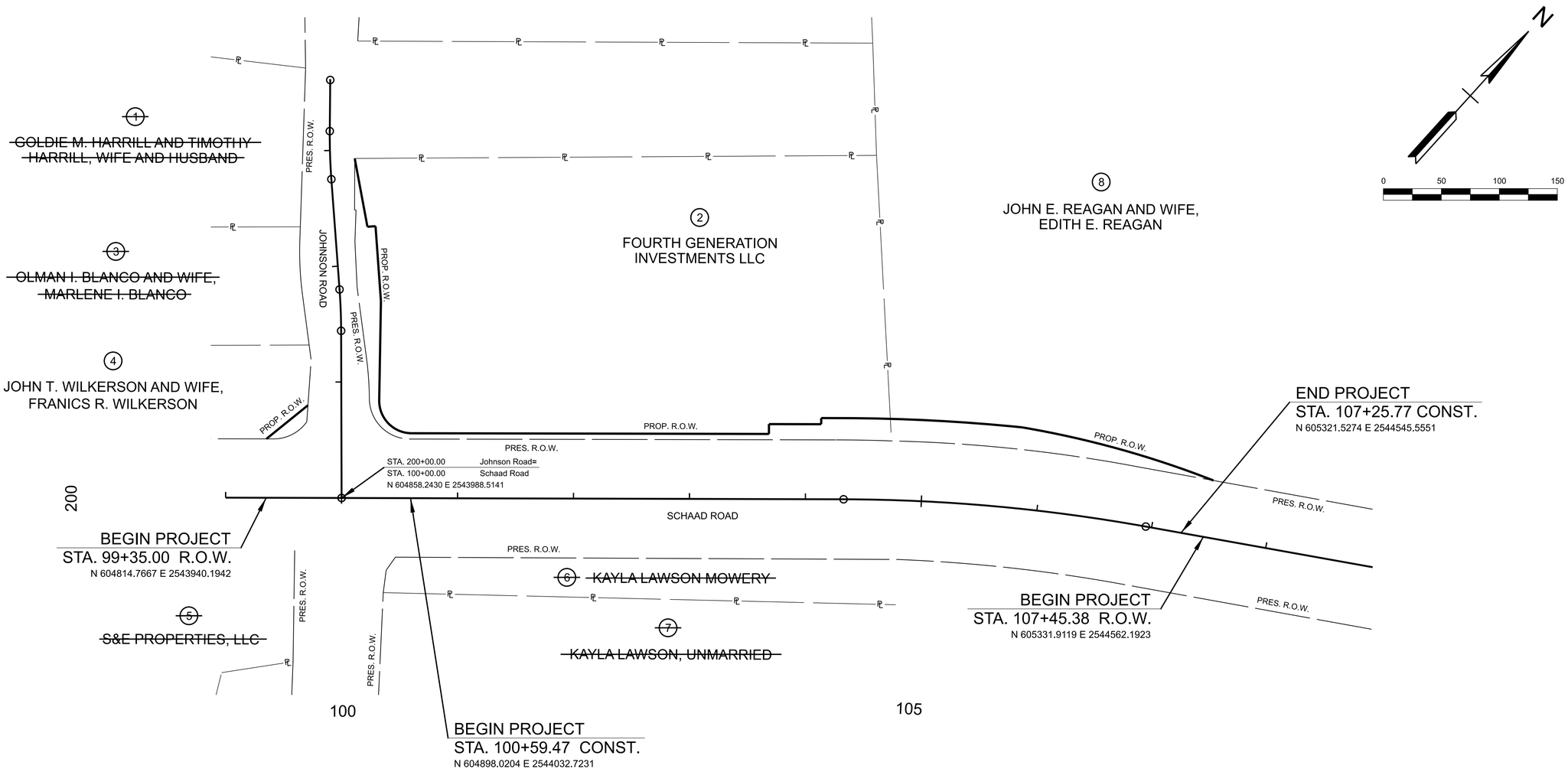
County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date



R.O.W. ACQUISITION TABLE

TRACT NO.	PROPERTY OWNERS	COUNTY RECORDS				TOTAL AREA (ACRES)			AREA TO BE ACQUIRED (ACRES)			AREA REMAINING (ACRES)	
		TAX MAP NO.	PARCEL NO.	DEED DOCUMENT REFERENCE		LEFT	RIGHT	TOTAL	LEFT	RIGHT	TOTAL	LEFT	RIGHT
				BOOK	PAGE								
1	~~Goldie M. Harril and Timothy Harrill, wife and husband~~	~~092~~	~~11.02~~	~~20240266~~	~~0040920~~	~~0.801~~		~~0.801~~				~~0.801~~	
2	Fourth Generation Investments LLC	092	12.01	20220407	0076998	2.690		2.690	0.143		0.143	2.547	
3	~~Olman I. Blanco and Wife, Marlene I. Blanco~~	~~092~~	~~10~~	~~20120518~~	~~0065180~~	~~0.618~~		~~0.618~~				~~0.618~~	
4	John T. Wilkerson and wife, Frances R. Wilkerson	092	9	20031203	0058387	0.529		0.529	372 S.F.		372 S.F.	0.520	
5	~~S&E Properties LLC~~	~~092~~	~~9.01~~	~~20110323~~	~~0056335~~		~~2.170~~	~~2.170~~					~~2.170~~
6	~~Kayla Lawson Mowery~~	~~092~~	~~12.03~~	~~20161005~~	~~0022343~~		~~0.352~~	~~0.352~~					~~0.352~~
7	~~Kayla Lawson, Unmarried~~	~~092~~	~~12.01~~	~~20120117~~	~~0039099~~		~~1.050~~	~~1.050~~					~~1.050~~
8	John E. Reagan and wife, Edith E. Reagan	092	46	20040728	0008381	23.900	20.560	44.460	4054 S.F.		4054 S.F.	23.807	20.560

R.O.W. ACQUISITION TABLE

NO. | DATE: | ISSUE DESCRIPTION

R.O.W. FOR REVIEW ONLY

02/06/2026

IF THIS DOCUMENT IS NOT SIGNED, SEALED, AND DATED, IT MAY NOT BE USED FOR CONSTRUCTION.

PROJECT:

SCHAAD ROAD AT JOHNSON ROAD - TURN LANES AND SIGNAL DESIGN

CANNON & CANNON INC
10025 Investment Drive, Suite 120
Knoxville, TN 37932
865.670.8555
www.cci-corp.com

CLIENT:

KNOX COUNTY DEPARTMENT OF ENGINEERING AND PUBLIC WORKS

CCI PROJ. NO.	00263-0119
DATE:	FEB 6, 2026
PM/PC:	WAS/WAS
DRAWN BY:	TAP

PROPERTY MAP AND R.O.W. ACQUISITION TABLE

2/5/2026 9:40:45 AM
C:\PROGRAMDATA\BENTLEY\OPENROADS DESIGNER CE 10.12\CONFIGURATION\ORGANIZATION-CIVIL\TDOT_STANDARDS\DGNLIB\SHEET SEEDS\ROAD\TDOT PLAN 20 SCALE.DGNLIB

RLA-18250 **R-26-3-407**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: ENGINEERING AND PUBLIC WORKS

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a State Aid Contract with the Tennessee Department of Transportation (TDOT) for the engineering of the widening of 2.76 miles S Northshore Drive for a cost of $565,745.00, with $554,430.10 (98%) provided by TDOT and $11,314.90 (2%) provided by Knox County. **(TO BE ADDED)**

(Engineering and Public Works)

Attachments

Resolution

Contract

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A STATE AID CONTRACT WITH THE TENNESSEE DEPARTMENT OF TRANSPORTATION (TDOT) FOR THE ENGINEERING OF THE WIDENING OF 2.76 MILES OF S. NORTHSHORE DRIVE FOR A COST OF $565,745.00, WITH $554,430.10 (98%) PROVIDED BY TDOT AND $11,314.90 (2%) PROVIDED BY KNOX COUNTY.

RESOLUTION: **R-26-3-407**

REQUESTED BY: **ENGINEERING & PUBLIC WORKS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County has received an Agreement from the Tennessee Department of Transportation (TDOT) for the engineering for the widening of 2.76 miles of S. Northshore Drive from Choto Road to Concord Road, as further detailed in the attached Agreement

WHEREAS, the proposed Agreement provides for the engineering for the widening of 2.76 miles of S. Northshore Drive; and

WHEREAS, Knox County desires to accept this contract award as the Project will benefit Knox County and the citizens thereof; and

WHEREAS, the total estimated cost of the Project is $565,745.00 with $554,430.10 (98%) being provided by TDOT and $11,314.90 (2%) being provided by Knox County.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Agreement with the Tennessee Department of Transportation for State Aid for the engineering for the widening of 2.76 miles of S. Northshore Drive is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Agreement with the Tennessee Department of Transportation for State Aid for the engineering for the widening of 2.76 miles of S. Northshore Drive shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

AGREEMENT
BETWEEN THE STATE OF TENNESSEE
DEPARTMENT OF TRANSPORTATION
AND
KNOX COUNTY

THIS AGREEMENT is entered into between the State of Tennessee, Department of Transportation, hereinafter referred to as the "Department," and **Knox County**, hereinafter referred to as the "Local Government," for the purpose of providing for maintenance of the State-Aid system of local routes in accordance with Tenn. Code Ann. 54-4-401 *et seq*., as further defined in the "SCOPE OF SERVICES AND DELIVERABLES."

PREAMBLE:

WHEREAS, a state-aid highway system consisting of certain routes in the county road network was established by Tenn. Code Ann. 54-4-401 *et seq*. ("State-Aid"); and

WHEREAS, the parties want to enter into agreement to provide for certain maintenance of a State-Aid route(s) as described herein; and

WHEREAS, the Local Government has prepared plans and specifications for the following maintenance activities:

State-Aid Route #: **SA 4701-4**
State Project #: **47SAR1-S8-032**
Route Name: **South Northshore Drive**
From: **Choto Road** To **Concord Road**
(If Applicable) Contractor Name: **N/A**
(If Applicable) Shoulders resurfaced with: **N/A**
PIN: **136400.00**
TDOT Contract Number: **260014**

hereinafter referred to as the "Project"; Engineering for the widening of 2.76 miles of South Northshore Drive in Knox County**.**

NOW, THEREFORE, in consideration of the premises, the Department and the Local Government enter into this Agreement to provide for the funding and performance of the Project.

A. SCOPE OF SERVICES AND DELIVERABLES:

A.1. The Local Government shall provide plans and specifications for the construction of the Project for the Department's approval. If the Project includes replacement or construction of a bridge, then the plans shall be prepared by an engineer licensed in the State of Tennessee and designed in accordance with the latest AASHTO LRFD Standard Specifications for Highway Bridges, with Addenda, in effect on the Effective Date. If the

Project is for resurfacing only, then the Local Government shall provide, in lieu of plans, a typical section drawing including the paving schedule for the Department's approval.

A.2. All construction shall be performed in accordance with the approved construction plans, the Department's Standard Specifications of Road and Bridge Construction (current Edition), as amended and supplemented by the Department's Supplemental Specifications, the Manual on Uniform Traffic Control Devices, and normally accepted construction practices.

A.3. The Department hereby approves Attachment One, which is attached hereto and incorporated herein as a part of this Agreement, detailing the Project work to be performed by the Local Government. The Local Government agrees that where any State-Aid Route intersects with a state highway or other public road the Project work will continue across the right-of-way of the intersecting state highway or public road to the point where the State-Aid-Route abuts with the roadway of the state highway or public road.

A.4. Construction Schedule: Work to begin as soon as possible after execution of this Agreement and to be completed on or before **June 30, 2027**.

A.5. The Project shall be constructed subject to the approval of the Department only for conformity with the plans and specifications.

A.6. The Local Government shall adhere to the provisions of Tenn. Code Ann. § 54-4-401 *et seq.*, the Department's State-Aid Program Guidelines, and to the Local Government's own adopted rules and regulations, and hereby certifies that these provisions, guidelines, and rules and regulations will be carried out. In the event of any conflict between the Department's State-Aid Program Guidelines and the Local Government's own adopted rules and regulations, the Department's State-Aid Program Guidelines shall control.

A.7. Final determination of actual costs allowable under the terms of this Agreement shall be based upon a final review and approval by the Department of quantities and agreed unit prices, as certified to by the Local Government's engineer. The Local Government shall permit, and shall require its contractor and engineer to permit, the Department to inspect all work, materials, payrolls, and other data and records with regard to the Project and to audit the books, records and accounts of the Local Government and its contractor with regard to the Project.

A.8. If applicable, the Local Government has requested that it be authorized to perform with its own forces those items of work identified on the "Estimated Quantities of Work and Agreed Unit Prices," attached hereto and incorporated herein as Attachment One, and the Department, having found the Local Government to be equipped and qualified to perform such work, hereby concurs in said request. The Local Government has elected to have the remaining work, if any, identified on Attachment One to be accomplished by awarding a construction contract after advertising for bids in a newspaper having circulation in the county where the Project is located for at least two (2) weekly issues prior to the date of accepting bids. The Local Government shall comply with its adopted rules and regulations governing competitive bid procedures, consistent with laws governing the awarding of highway or road construction contracts.

A.9. The Department has encumbered its share of the Project cost. In the event the work under the contract is not completed in the current fiscal year, the encumbered funds will be carried over to the next fiscal year.

B. TERM OF CONTRACT:

This Agreement shall be effective on the last date of signature ("Effective Date") and extend until June 30, 2027 ("Term"). The Department shall have no obligation to the Local Government for fulfillment of the Scope outside the Term.

C. PAYMENT TERMS AND CONDITIONS:

C.1. Estimated Maximum Liability. The estimated total cost of the Project under this Agreement is **Five Hundred Sixty-Five Thousand Seven Hundred Forty-Five Dollars and No Cents ($565,745.00**) ("Estimated Maximum Liability"). The "Department Share" listed in Section C.2. of this Agreement is the maximum amount due the Local Government under this Agreement; provided that with advance written approval of the Department, the final total cost of the Project and the parties' pro rata share thereof may increase as follows without execution of an amendment to this Agreement:

If the Department provides advance written approval for the actual cost of the Project to exceed the Estimated Maximum Liability, and if the Local Government has any unexpended balance of the current fiscal year State-Aid program funds to cover the costs, then the Department and the Local Government shall pay the amount above the Estimated Maximum Liability in the pro rata percentages set forth in Section C.2., and the Local Government's share thereof shall be paid from its unexpended balance of the current fiscal year State-Aid program funds. In the event that the Local Government's current fiscal year State-Aid program funds all have been expended, the costs above the Estimated Maximum Liability shall be paid entirely from Local Government funds. The Department shall not participate in any Project costs once the Local Government's current fiscal year State-Aid program funds all have been expended, and the Department shall not participate in any Project costs for which advance written approval has not been given.

C.2. Department Share and Local Government Share. In accordance with Tenn. Code Ann. 54-5-404, the Local Government shall provide at least two percent (2%) of the approved Project cost in cash from Local Government funds or in-kind Project work approved by the commissioner of the Department, or both.

The parties agree that their respective shares of the Estimated Maximum Liability for the Project shall be as follows:

Department Share:	(**98**%)	**$ 554,430.10**
Local Government Share:	(**2**%)	**$ 11,314.90**
Total Project Cost:		**$ 565,745.00**

C.3. Reimbursements to Reflect Match/Share. Reimbursements to Local Government shall reflect the percentage of Local Government Share detailed in Section C.2. Reimbursements are subject to the other provisions of this Agreement, including but not limited to, Section C.1.

C.4. Invoice Requirements. The Local Government shall invoice the Department no more often than monthly, with all necessary supporting documentation, and present such to:

Tennessee Department of Transportation
Sharees Fife, Region 1 State-Aid Office
7345 Region Lane
Knoxville, TN 37914
Email: Sharees.Fife@tn.gov
Telephone # (865) 719-0203

a. Each invoice shall clearly and accurately detail all of the following required information (calculations must be extended and totaled correctly).

(1) Invoice/Reference Number (assigned by the Local Government).
(2) State Aid Number.
(3) State Project Number.
(4) Local Road Name.
(5) Invoice Date.
(6) Invoice Period (to which the reimbursement request is applicable).
(7) Agreement Number (assigned by the Department).
(8) Local Government Name.
(9) Local Government Remittance Address.
(10) Local Government Contact for Invoice Questions (name, phone or fax).
(11) Itemization of Reimbursement Requested for the Invoice Period— it must detail, at minimum, all of the following:

i. All line-item numbers as shown in Attachment 1 in numerical order
ii. Item Description
iii. Estimated Quantities
iv. Current Quantities
v. Previous Quantities
vi. Unit
vii. Unit Price
viii. The current amount requested
ix. The previous amount requested
x. Total amount reimbursed to date

b. The Local Government understands and agrees to all of the following.

(1) An invoice under this Agreement shall include only reimbursement requests for actual, reasonable, and necessary expenditures required in the

delivery of service described by this Agreement and shall be subject to Attachment One and any other provision of this Agreement relating to allowable reimbursements.

(2) An invoice under this Agreement shall not include any reimbursement request for future expenditures.

(3) An invoice under this Agreement shall initiate the timeframe for reimbursement only when the Department is in receipt of the invoice, and the invoice meets the minimum requirements of this Section C.4.

C.5. Payment Methodology. Payments will be made by the Department to the Local Government on the basis of actual quantities of items of work performed at the agreed unit price(s) set forth in Attachment One, including any adjusted unit prices and/or additional required pay items applicable to the Project as provided in the TDOT Standard Specifications for Road and Bridge Construction (current Edition).

Payment to the Local Government may be a sum made in advance, upon the Department's approval of the invoice submitted by the Local Government's contractor to the Local Government. For such payments, the Local Government shall pay its contractor within thirty (30) days of the Local Government's receipt of such funds from the Department and shall retain records of such payments.

C.6. Payment of Invoice. A payment by the Department shall not prejudice the Department's right to object to or question any reimbursement, invoice, or related matter. A payment by the Department shall not be construed as acceptance of any part of the work or service provided or as approval of any amount as an allowable cost.

C.7. Non-allowable Costs. Any amounts payable to the Local Government shall be subject to reduction for amounts included in any invoice or payment that are determined by the Department, on the basis of audits or monitoring conducted in accordance with the terms of this Agreement, to constitute unallowable costs.

C.8. Department's Right to Set Off. The Department reserves the right to set off or deduct from amounts that are or shall become due and payable to the Local Government under this Agreement or under any other agreement between the Local Government and the Department under which the Local Government has a right to receive payment from the Department.

C.9. Prerequisite Documentation. The Local Government shall not invoice the Department under this Agreement until the Department has received the following, properly completed documentation.

a. The Local Government shall complete, sign, and return to the Department an "Authorization Agreement for Automatic Deposit (ACH Credits) Form" provided by the Department. By doing so, the Local Government acknowledges and agrees that, once this form is received by the Department, all payments to the Local Government under this or any other Agreement will be made by automated clearing house ("ACH").

b. The Local Government shall complete, sign, and return to the Department the Department-provided W-9 form. The taxpayer identification number on the W-9 form must be the same as the Local Government's Federal Employer Identification Number or Social Security Number referenced in the Local Government's Edison registration information.

D. STANDARD TERMS AND CONDITIONS:

D.1. Required Approvals. The Department is not bound by this Agreement until it is signed by the parties and approved by appropriate officials.

D.2. Modification and Amendment. This Agreement may be modified only by a written amendment signed by all parties.

D.3. Termination for Convenience. The Department may terminate this Agreement without cause for any reason. A termination for convenience shall not be a breach of this Agreement by the Department. The Department shall give the Local Government at least thirty (30) days written notice before the effective termination date. The Local Government shall be entitled to compensation for authorized expenditures and satisfactory services completed as of the termination date, but in no event shall the Department be liable to the Local Government for compensation for any service that has not been rendered. The final decision as to the amount for which the Department is liable shall be determined by the Department. The Local Government shall not have any right to any actual general, special, incidental, consequential, or any other damages whatsoever of any description or amount for the Department's exercise of its right to terminate for convenience.

D.4. Termination for Cause. If the Local Government fails to properly perform its obligations under this Agreement, or if the Local Government violates any terms of this Agreement, the Department shall have the right to immediately terminate this Agreement and withhold payments in excess of fair compensation for completed services. Notwithstanding the exercise of the Department's right to terminate this Agreement for cause, the Local Government shall not be relieved of liability to the Department for damages sustained by virtue of any breach of this Agreement by the Local Government.

D.5. Subcontracting. The Local Government shall not assign this Agreement or enter into a subcontract for any of the services performed under this Agreement without obtaining the prior written approval of the Department. If such subcontracts are approved by the Department, each shall contain, at a minimum, sections of this Agreement pertaining to "Conflicts of Interest," "Nondiscrimination," "Debarment and Suspension," and "Records" (as identified by the section headings). Notwithstanding any use of approved subcontractors, the Local Government shall remain responsible for all work performed.

D.6. Conflicts of Interest. The Local Government warrants that no part of the total Agreement Amount shall be paid directly or indirectly to an employee or official of the Department of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Local Government in connection with any work contemplated or performed relative to this Agreement.

D.7. Communications and Contacts. All instructions, notices, consents, demands, or other communications required or contemplated by this Agreement shall be in writing and shall be made by certified, first class mail, return receipt requested and postage prepaid, by overnight courier service with an asset tracking system, or by email or facsimile transmission with recipient confirmation. All communications, regardless of method of transmission, shall be addressed to the respective party as set out below:

The Department:

Lisa Dunn / Manager State-Aid Office
12th Floor William R. Snodgrass Tennessee Tower
312 Rosa L. Parks Ave
Nashville, TN 37243
Email: Lisa.Dunn@tn.gov
Telephone # (615) 519-2963

The Local Government:

Jim Snowden, P.E. / Road Superintendent
Knox County Highway Department
205 West Baxter Avenue
Knoxville, TN 37917
Email: Jim.Snowden@knoxcounty.org
Telephone # (865) 215-5808

A change to the above contact information requires written notice to the person designated by the other party to receive notice.

All instructions, notices, consents, demands, or other communications shall be considered effectively given upon receipt or recipient confirmation as may be required.

D.8. Subject to Funds Availability. This Agreement is subject to the appropriation and availability of State funds. In the event that the funds are not appropriated or are otherwise unavailable, the Department reserves the right to terminate this Agreement upon written notice to the Local Government. The Department's right to terminate this Agreement due to lack of funds is not a breach of this Agreement by the Department. Upon receipt of the written notice, the Local Government shall cease all work associated with the Agreement. Should such an event occur, the Local Government shall be entitled to compensation for all satisfactory and authorized services completed as of the termination date. Upon such termination, the Local Government shall have no right to recover from the Department any actual, general, special, incidental, consequential, or any other damages whatsoever of any description or amount.

D.9. Nondiscrimination. The Local Government hereby agrees, warrants, and assures that no person shall be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of this Agreement or in the employment practices of the Local Government on the grounds of handicap or disability, age, race, color, religion, sex, national origin, or any other classification protected by federal, Tennessee state constitutional, or statutory law. The Local Government shall, upon

request, show proof of nondiscrimination and shall post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

D.10. Licensure. The Local Government, its employees, and any approved subcontractor shall be licensed pursuant to all applicable federal, state, and local laws, ordinances, rules, and regulations and shall upon request provide proof of all licenses.

D.11. Records. The Local Government and any approved subcontractor shall maintain documentation for all charges under this Agreement. The books, records, and documents of the Local Government and any approved subcontractor, insofar as they relate to work performed or money received under this Agreement, shall be maintained in accordance with applicable Tennessee law. In no case shall the records be maintained for a period of less than five (5) full years from the date of the final payment. The Local Government's records shall be subject to audit at any reasonable time and upon reasonable notice by the Department, the Comptroller of the Treasury, or their duly appointed representatives.

D.12. Monitoring. The Local Government's activities conducted and records maintained pursuant to this Agreement shall be subject to monitoring and evaluation by the Department, the Comptroller of the Treasury, or their duly appointed representatives.

D.13. Progress Reports. The Local Government shall submit brief, periodic, progress reports to the Department as requested.

D.14. Strict Performance. Failure by any party to this Agreement to insist in any one or more cases upon the strict performance of any of the terms, covenants, conditions, or provisions of this Agreement is not a waiver or relinquishment of any term, covenant, condition, or provision. No term or condition of this Agreement shall be held to be waived, modified, or deleted except by a written amendment signed by the parties.

D.15. Independent Contractor. The parties shall not act as employees, partners, joint venturers, or associates of one another in the performance of this Agreement. The parties acknowledge that they are independent contracting entities and that nothing in this Agreement shall be construed to create a principal/agent relationship or to allow either to exercise control or direction over the manner or method by which the other transacts its business affairs or provides its usual services. The employees or agents of one party shall not be deemed or construed to be the employees or agents of the other party for any purpose whatsoever.

D.16. Limitation of Department's Liability. The Department shall have no liability except as specifically provided in this Agreement. In no event will the Department be liable to the Local Government or any other party for any lost revenues, lost profits, loss of business, loss of grant funding, decrease in the value of any securities or cash position, time, money, goodwill, or any indirect, special, incidental, punitive, exemplary or consequential damages of any nature, whether based on warranty, contract, statute, regulation, tort (including but not limited to negligence), or any other legal theory that may arise under this Agreement or otherwise. The Department's total liability under this Agreement (including any exhibits, schedules, amendments or other attachments to the Contract) or otherwise shall under no circumstances exceed the Maximum Liability originally

established in Section C.1 of this Agreement. This limitation of liability is cumulative and not per incident.

D.17. Debarment and Suspension. The Local Government certifies, to the best of its knowledge and belief, that it, its current and future principals, its current and future subcontractors and their principals:

a. are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal or state department or agency;

b. have not within a three (3) year period preceding this Agreement been convicted of, or had a civil judgment rendered against them from commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or grant under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;

c. are not presently indicted or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses detailed in section b. of this certification; and

d. have not within a three (3) year period preceding this Agreement had one or more public transactions (federal, state, or local) terminated for cause or default.

The Local Government shall provide immediate written notice to the State if at any time it learns that there was an earlier failure to disclose information or that due to changed circumstances, its principals or the principals of its subcontractors are excluded, disqualified, or presently fall under any of the prohibitions of sections a-d.

D.18. Force Majeure. "Force Majeure Event" means fire, flood, earthquake, elements of nature or acts of God, wars, riots, civil disorders, rebellions or revolutions, acts of terrorism or any other similar cause beyond the reasonable control of the party except to the extent that the non-performing party is at fault in failing to prevent or causing the default or delay, and provided that the default or delay cannot reasonably be circumvented by the non-performing party through the use of alternate sources, workaround plans or other means. A strike, lockout or labor dispute shall not excuse either party from its obligations under this Agreement. Except as set forth in this Section, any failure or delay by a party in the performance of its obligations under this Agreement arising from a Force Majeure Event is not a default under this Agreement or grounds for termination. The non-performing party will be excused from performing those obligations directly affected by the Force Majeure Event, and only for as long as the Force Majeure Event continues, provided that the party continues to use diligent, good faith efforts to resume performance without delay. The occurrence of a Force Majeure Event affecting Local Government's representatives, suppliers, subcontractors, customers or business apart from this Agreement is not a Force Majeure Event under this Agreement. Local Government will promptly notify the Department of any delay caused by a Force Majeure Event (to be confirmed in a written notice to the Department within one (1) day of the inception of the delay) that a Force

Majeure Event has occurred, and will describe in reasonable detail the nature of the Force Majeure Event. If any Force Majeure Event results in a delay in Local Government's performance longer than forty-eight (48) hours, the Department may, upon notice to Local Government: (a) cease payment of the fees until Local Government resumes performance of the affected obligations; or (b) immediately terminate this Agreement or any purchase order, in whole or in part, without further payment except for fees then due and payable. Local Government will not increase its charges under this Agreement or charge the Department any fees other than those provided for in this Agreement as the result of a Force Majeure Event.

D.19. Procurement. If other terms of this Agreement allow reimbursement for the cost of goods, materials, supplies, equipment, or contracted services, such procurement shall be made on a competitive basis, including the use of competitive bidding procedures, where practical. The Local Government shall maintain documentation for the basis of each procurement for which reimbursement is paid pursuant to this Agreement. In each instance where it is determined that use of a competitive procurement method is not practical, supporting documentation shall include a written justification for the decision and for use of a non-competitive procurement.

D.20. Tennessee Department of Revenue Registration. The Local Government shall comply with all applicable registration requirements contained in Tenn. Code Ann. §§ 67-6-601 – 608. Compliance with applicable registration requirements is a material requirement of this Agreement.

D.21. State and Federal Compliance. The Local Government shall comply with all applicable state and federal laws and regulations in the performance of this Agreement.

D.22. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Tennessee. The Local Government agrees that it will be subject to the exclusive jurisdiction of the courts of the State of Tennessee in actions that may arise under this Agreement. The Local Government acknowledges and agrees that any rights or claims against the State of Tennessee or its employees hereunder, and any remedies arising there from, shall be subject to and limited to those rights and remedies, if any, available under Tenn. Code Ann. §§ 9-8-101 through 9-8-407.

D.23. Completeness. This Agreement is complete and contains the entire understanding between the parties relating to the subject matter contained herein, including all the terms and conditions agreed to by the parties. This Agreement supersedes any and all prior understandings, representations, negotiations, or agreements between the parties, whether written or oral.

D.24. Severability. If any terms and conditions of this Agreement are held to be invalid or unenforceable as a matter of law, the other terms and conditions shall not be affected and shall remain in full force and effect. To this end, the terms and conditions of this Agreement are declared severable.

D.25. Headings. Section headings are for reference purposes only and shall not be construed as part of this Agreement.

D.26. Iran Divestment Act. The requirements of Tenn. Code Ann. § 12-12-101 *et seq*., addressing contracting with persons as defined at T.C.A. §12-12-103(5) that engage in investment activities in Iran, shall be a material provision of this Agreement. The Local Government certifies, under penalty of perjury, that to the best of its knowledge and belief that it is not on the list created pursuant to Tenn. Code Ann. § 12-12-106.

D.27. Maintenance. Pursuant to T.C.A. § 54-1-126(b), upon completion of the construction of the Project, the Local Government shall be solely responsible for the maintenance of the completed Project. The Local Government acknowledges that where any county road intersects with a state highway or other public road, the Local Government's maintenance responsibility for the county road, including but not limited to traffic control devices, continues across the right-of-way of the intersecting state highway or public road to the point where the local road abuts the roadway of the state highway or public road.

D.28. No Retainage Allowed. The Local Government may not withhold retainage on progress payments from the prime contractor and the prime contractor may not withhold retainage from their subcontractors.

IN WITNESS WHEREOF,

KNOX COUNTY:

_____

Jim Snowden, Knox County Road Superintendent

_____

Glenn Jacobs, Knox County Mayor

_____

David Buuck, Knox County Law Director

TENNESSEE DEPARTMENT OF TRANSPORTATION:

_____

Will Reid, TDOT Commissioner

APPROVED AS TO FORM AND LEGALITY:

Leslie South, TDOT General Counsel

Daniel Pallme, Asst. Chief of Planning Bureau

February 25, 2022

ATTACHMENT ONE

ESTIMATED QUANTITIES OF WORK AND AGREED UNIT PRICES

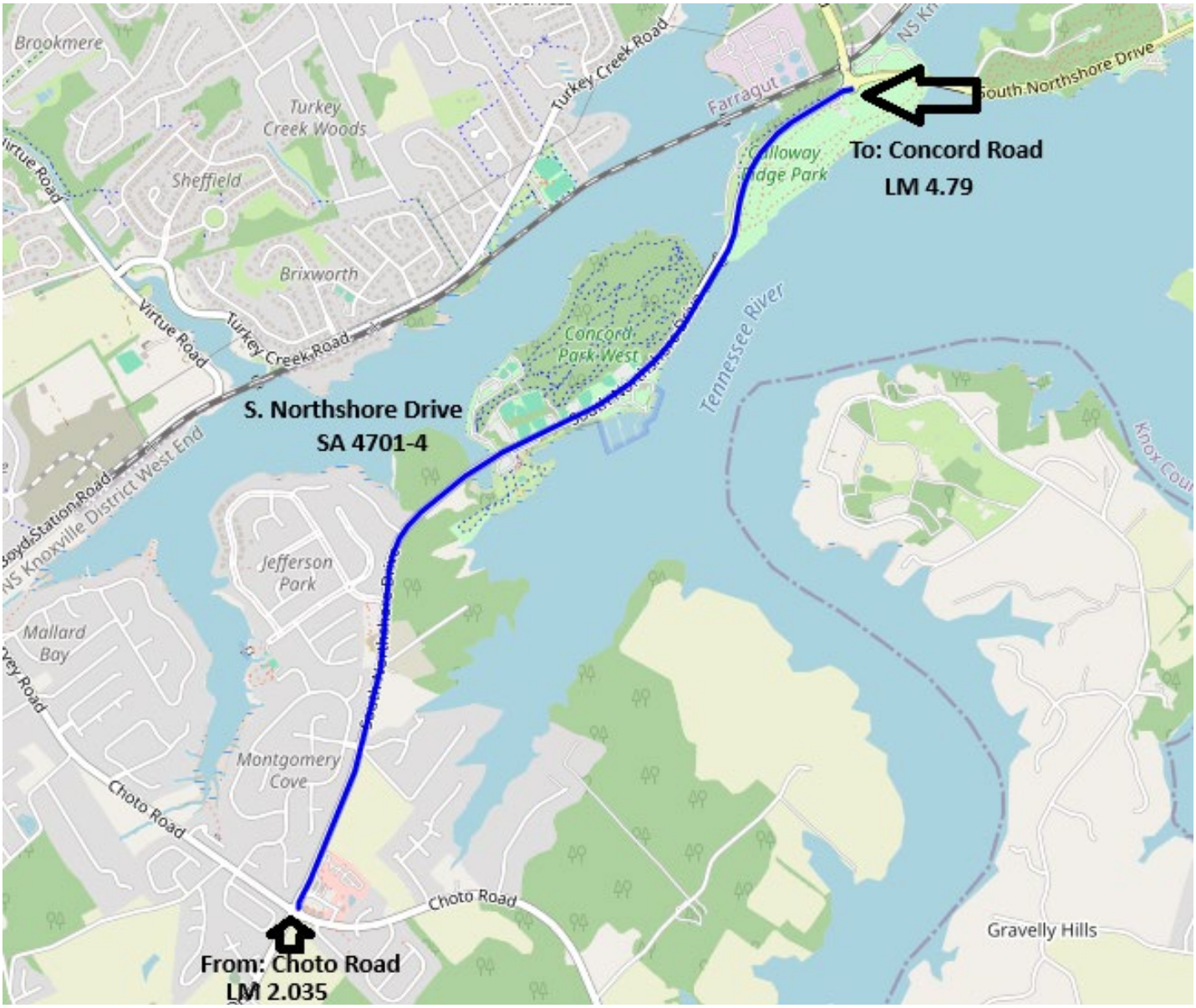
Item No.	Description	Quantity	Unit	Price	Amount
720-04.80	Engineering Fee	1	LS	$ 565,745.00	$ 565,745.00
		Total Project Cost			$ 565,745.00

ADDITIONAL ITEMS (WHERE APPLICABLE)			
SP109B	Payment Adjustment for Bituminous Material	TN	Paid per TDOT Special Provision 109B

Knox County

South Northshore Drive

From: Choto Road To: Concord Road



RLA-18249 **R-26-3-408**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: ENGINEERING AND PUBLIC WORKS

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Proposal for Professional Services for Stormwater Manual Development in the amount of $152,420.00 with WSP USA Inc. **(TO BE ADDED)**

(Engineering and Public Works)

Attachments

Resolution

Proposal

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A PROPOSAL FOR PROFESSIONAL SERVICES FOR STORMWATER MANUAL DEVELOPMENT IN THE AMOUNT OF $152,420.00 WITH WSP USA INC.

RESOLUTION: R-26-3-408

REQUESTED BY: ENGINEERING & PUBLIC WORKS

PREPARED BY: KNOX COUNTY LAW DIRECTOR'S OFFICE

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, Knox County is preparing to develop a new Stormwater Management Manual (the "Project"); and

WHEREAS, Knox County has received a Proposal for Professional Services for Stormwater Manual Development from WSP USA Inc. in the amount of $152,420.00 to provide the professional services for the Project; and

WHEREAS, the Proposal sets forth the scope of services, project schedule and estimated cost.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Proposal for Professional Services for Stormwater Manual Development with WSP USA Inc. is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Proposal for Professional Services for Stormwater Manual Development with WSP USA Inc. shall be executed subject to such amendment or action not affecting the substantive provisions of the proposal as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

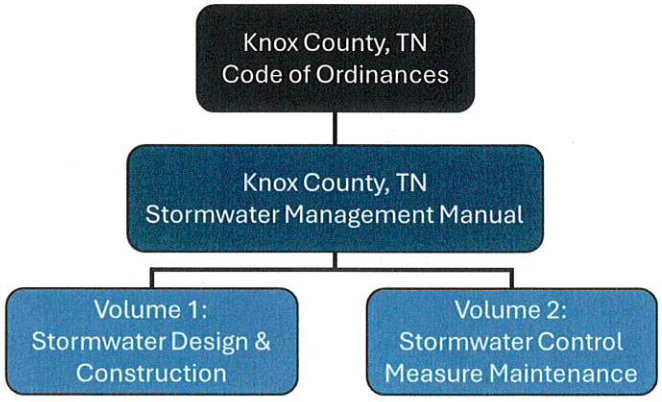
Vetoed:_____

County Mayor Date

Proposal for Professional Services to Knox County, TN for Stormwater Manual Development

February 19, 2026

WSP USA Inc. (WSP) provides this proposal to Knox County, Tennessee (County) for professional services to develop a new Stormwater Management Manual (SWMM), which will replace the County's current SWMM. The new manual will comply with the post-construction stormwater management requirements of the 2022 Tennessee NDPES General Permit for Small MS4s. The general structure of the new SWMM is presented in the graphic below.



The development of both volumes is included in this proposed scope of services, along with a project schedule and estimated cost.

SCOPE OF SERVICES

Limitations on Photographs and Graphics

Note: WSP will use the highest quality photographs and graphics (including technical charts) we have available in the creation of Volumes 1 and 2 to provide crisp, professional products. We can usually make minor edits to graphics without the need for a graphic designer. We also encourage the County to provide high resolution photographs and graphics to help 'localize' the volumes. However, this scope does not include the collection of photographs locally or via-internet research, revisions of graphics that require the assistance of a graphic designer, and the creation of new graphics to align with a County-desired style including font types/sizes, line types, and color schemes. These services can be provided by WSP if requested, but they will require a change order.

Task 1 – Project Management

This task is intended to cover project management activities including, but not limited to, project set up in WSP's accounting system, task, schedule, and budget management, invoice preparation, and accounts receivable activities.

Deliverables

- ✓ None

Task 2 – Current SWMM Review and Volume 1 Format

The objectives of Task 2 are to: 1) review the current County SWMM with County staff to determine where policy or guidance updates are needed, and 2) create a format for both volumes of the new SWMM. The following subtasks are included.

A. **Current SWMM Review Meeting:** WSP staff will meet with County staff to review the current County SWMM, chapter by chapter to identify where policy or guidance updates are needed, and to refine the Table of Contents for Volume 1 provided in this proposal. Two in-person meetings up to 2 hours each are included.

B. **Volume Format:** WSP will prepare an example chapter and stormwater control measure (SCM) design specification for Volume 1 of the new SWMM in two different formats for County review. WSP will refine the preferred format (i.e., fonts, spacing, colors, headers, footers, etc.) based on County comments. Up to two drafts of the preferred format are included. The final draft will be used for development of Volume 1. One virtual meeting is included.

Deliverables *(all documents will be delivered via email or other electronic means)*

- ✓ Two (2) format mock-ups, as described above
- ✓ Up to two (2) further refined drafts of the preferred format

Task 3 – Volume 1: Stormwater Design & Construction

Volume 1 will establish the policies, performance standards, methods, and design specifications for the design of privately-owned stormwater drainage systems SCMs, including detention structures. Source content will be based on the County's current SWMM and the policy updates identified in Task 2, SCM design specification revisions provided to WSP by the County in 2024 and 2025, and content, photographs, and graphics gathered or created by WSP for other local government stormwater manuals in United States.

A preliminary Table of Contents (TOC) is provided below. Annotations are provided in *blue italics* to clarify section or chapter content or assumptions. It is important to note that this preliminary TOC will likely change as first draft of the volume is created, primarily in terms of headings and structure. Once the project begins, the development of content not included in this TOC may require a change order.

1. **Introduction**
   - 1.1 Administrative Approval
   - 1.2 Purpose and Objectives
   - 1.3 Applicability and Use
   - 1.4 Overview of Contents
   - 1.5 Volume Maintenance
2. **Required Permits, Plans, and Procedures**
   - 2.1 Introduction
   - 2.2 Overview of the Site Development Process *(Does not include flowchart updates. Typically, this info is not addressed in a stormwater manual, but rather left to a Planning/Development Services dept to convey.)*
   - 2.3 Applicable Permits *(LDP, Building Permit, SPAP, Floodplain Development Permit, Elev Certificate – typically, this info is not addressed in SW manual, but rather left to a Planning/Development Services dept to convey)*
   - 2.4 Stormwater Management Plan *(SWMP purpose and preparation objective, reference to checklist in appendix, may also include brief discussions of sub-plans, such as Vegetation Plan, O&M plan, etc.)*
   - 2.5 As-Built Certifications and Maintenance Agreements *(plan purpose and preparation objective, reference to checklist in appendix)*
3. **Stormwater Low Impact Development** *(will use Hamilton Co's chapter as strong foundation, with appropriate, but minor updates for Knox Co.; does not include WQv credits)*
   - 3.1 The Importance of Plants and Soil
   - 3.2 Pre-Design Site Characterization and Planning
   - 3.3 Non-structural LID Practices *(1 to 2 pg. guidance and specs for up to 15 non-structural LID practices)*
4. **Hydrologic and Hydraulic Methods** *(succinct chapter brought over from Mobile AL manual, suitably updated for Knox Co)*
   - 3.1 Introduction
   - 3.2 Hydrology
     - 3.2.1 Rainfall Data and Resources
     - 3.2.2 Runoff Estimation Methods Applications
     - 3.2.3 Rational Method
     - 3.2.4 NRCS Curve Number Method
     - 3.2.5 Water Quality Volume Estimation Methods
     - 3.2.6 Water Quality Peak Flow Estimation Methods
     - 3.2.7 Water Balance Calculations
   - 3.3 Hydraulics

- 3.3.1 Basic Principles
- 3.3.2 Headwater and Tailwater Conditions
- 3.3.3 Inlet vs. Outlet Control
- 3.3.4 NRCS Curve Number Method
- 3.3.5 Design of Weirs and Orifices

5. **Stormwater Control Measures and Detention Ponds** *(Largely brought over from TriCities, suitably modified for Knox Co)*
   - 5.1 SCM Types
   - 5.2 Applications and Feasibility
   - 5.3 Bioretention Areas *(SCM specifications listed in Sections 4.4 through 4.12 will have the same subsections)*
     - 5.3.1 Overview
     - 5.3.2 General Description
     - 5.3.3 Planning
     - 5.3.4 Design
     - 5.3.6 Vegetation Standards
     - 5.3.7 Protection Guidance
     - 5.3.8 Design Procedure
     - 5.3.9 Land Disturbance and Construction
     - 5.3.10 Inspection and Maintenance During Construction
   - 5.3 Dry Detention Ponds
   - 5.4 Dry Enhanced Swales
   - 5.5 Green Roofs *(subsections will differ from Section 4.3, will largely refer to manuf. specs)*
   - 5.5 Infiltration Basins
   - 5.6 Manufactured Treatment Devices *(subsections will differ from Section 4.3, will largely refer to manufacturer specs)*
   - 5.7 Porous and Permeable Pavements *(subsections may differ from Section 4.3, will largely refer to manuf. specs)*
   - 5.8 Sand Filters
   - 5.9 Stormwater Wetlands
   - 5.11 Underground Detention Basins *(subsections may differ from Section 4.3, will largely refer to manuf. specs)*
   - 5.10 Wet Detention Ponds
   - 5.12 Wet Enhanced Swales
   - 5.13 Pretreatment Devices *(sediment forebays, rock aprons, filter strips, etc.)*
   - 5.14 Overflow Structures *(spillways, overflow pipes, etc.)*
   - 5.15 Underdrains *(spillways, overflow pipes, etc.)*

6. **Open Conveyance Systems**
   - 6.1 Introduction
   - 6.2 Channel Geometry and Lining Selection
   - 6.3 Flow Velocity Standards
   - 6.4 Allowable Shear Stress
   - 6.5 Side Slopes and Freeboard
   - 6.6 Constructability and Maintenance
   - 6.7 References

7. **Closed Conveyance Systems**
   - 7.1 Introduction
     - 7.1.1 Closed System Components
     - 7.1.2 Checklist for Planning and Design
     - 7.1.3 General Drainage Design Standards
   - 7.2 Stormwater Pipes
     - 7.2.1 Symbols and Definitions
     - 7.2.2 Manning's Equation
     - 7.2.3 Flow Velocity Standards
     - 7.2.4 Pipe Material Options and Criteria
     - 7.2.5 Pipe Size and Slope Requirements
     - 7.2.6 Capacity Calculations
     - 7.2.7 Hydraulic Grade Line (HGL) and Energy Grade Line (EGL) Calculations
     - 7.2.8 Invert Elevations and Cover Requirements
   - 7.3 Inlets, Catch Basins, and Manholes
     - 7.3.1 General Criteria

7.3.2 Symbols and Definitions
7.3.3 Street and Roadway Gutters
7.3.4 Inlet Types
7.3.5 Grade Inlets
7.3.6 Curb Inlets
7.3.7 Combination Inlets
7.3.8 Spacing and Bypass Design
7.3.9 Capacity and Clogging
7.3.10 Manhole Access, Spacing, and Design

7.4 Culverts
7.4.1 Symbols and Definitions
7.4.2 Design Standards
7.4.3 Design Procedures
7.4.4 Culvert Design Example
7.4.5 Design Procedures for Bevelled-Edged Inlets
7.4.6 Flood Routing and Culvert Design

7.5 Energy Dissipation
7.4.1 Riprap Aprons
7.3.2 Baffled Outlets

7.6 Level Spreader Design
7.7 References

8. **Water Quality Buffers** *(Significant edits from the 2025 revisions are not anticipated; graphics will be improved)*
8.1 Introduction
8.2 Minimum Standards
8.3 Protection During Construction
8.4 Width Averaging
8.5 Signage
8.6 Level Spreader Design

9. **Floodplains and Sinkholes** *(Significant edits from the 2025 revisions are not anticipated; graphics will be improved)*
8.1 Introduction
8.2 Applicable Federal Regulations
8.3 Local Floodplain Management Tools
8.4 Floodplain Management Regulations
8.5 Sinkholes

Appendices
A. SWMP Checklist (includes subplans/reports (i.e., drainage report, SCM vegetation plan, etc.)
B. Tier 1 SCM Feasibility Form
C. As-Built Plan Checklist

WSP will prepare three (3) drafts of the volume for review and comment by City staff, and one (1) final version. For each draft, WSP will edit as needed to address County comments. Those comments that WSP cannot resolve independently will be resolved with County assistance.

Draft 1 – This draft will be provided to the County for review and comment one chapter at a time, as chapters are completed by WSP. Formatting, pictures, and graphics may be limited in this volume. WSP will provide a review instructions to facilitate County reviews.

Up to three (3) 2-hour in-person meetings with WSP are included for comment review and resolution.

Drafts 2 – This draft will be provided to the County for review and comment as a fully-formatted volume, with all pictures and graphics. Edits to draft 1 that alter the context of policies, specifications, and guidance will be identified with highlights or a different color font for easy identification by County staff. Minor edits (e.g., grammar, spelling, renumbering, restructuring, etc.) will not be shown. For each draft, WSP will provide review instructions and a checklist of edit locations to facilitate County reviews.

One (1) 2-hour in-person meeting with WSP is included for comment review and resolution.

Drafts 3 – This fully-formatted draft will be provided to the County for review and comment, and for County provision to various third parties selected by the County. Edits to the previous draft that alter the context of policies, specifications,

and guidance will be identified, and minor edits will not be shown. For each draft, WSP will provide review instructions and a checklist of edit locations to facilitate County reviews.

WSP will create a SharePoint site or website to facilitate third party reviews of draft 3. The County is responsible for coordination of third-party reviews, interactions with reviewers and receiving their comments, and holding reviewers to a deadline for comments to be considered before volume finalization. WSP will compile comments received from reviewers. After resolution of comments with the County, WSP will provide a written response to each comment for County dissemination to reviewers.

One (1) 2-hour in-person meeting with WSP is included for third party comment review and resolution.

WSP's estimated cost was determined assuming the County will perform a thorough review of draft 1 and will provide a detailed comments and instructions for volume edits. This is critical to a cost-effective review process for drafts 2 and 3, when the volume is fully formatted and we should receive far fewer and less significant comments. Incomplete or haphazard reviews of draft 1 as evidenced by a multiple and significant comments in subsequent drafts (that were not identified by the County in draft 1) may result in the need for additional County funds to complete the volume.

Drafts 1 and 2 of the volume will be provided in Microsoft Word to facilitate use of its 'track changes' function for County reviews. Drafts 3 will be provided as non-navigable PDFs of each chapter. The final version will be provided as:

- a fully navigable PDF of the volume
- navigable PDFs of each individual chapters, except for Chapter 5 which will be provided as PDFs of each design specification; navigation will be confined to linkages in the Table of Contents only
- Microsoft Word files of each chapter (Chapter 5 will be provided by section)

Deliverables *(all documents will be delivered via email or other electronic means)*

- ✓ Up to three (3) drafts of SWMM Volume 1 in Microsoft Word
- ✓ Review instructions and checklists
- ✓ SharePoint or website for third-party reviews
- ✓ Response list to third-party comments
- ✓ One final version of SWMM Volume 1 in Microsoft word and navigable Adobe PDF formats as described above.

Task 4 – SWMM Volume 1 Seminar

The County intends to hold a 1-hour lunch & learn seminar to explain updated Stormwater Management Manual. The seminar will focus on Volume 1, and changes to County policy from the current version. WSP will prepare and deliver a PowerPoint presentation on the revisions and assist with questions and answers during the seminar. This task includes:

- Draft presentation preparation and review with County staff in an in-person meeting
- Final presentation and sign-in sheet preparation and emailing to the County for printing
- In-person delivery of presentation at County seminar
- Preparation and emailing of PDH certificates to attendees; WSP will use the completed sign-in sheet to prepare PDH certificates

It is the County's responsibility to advertise and coordinate the seminar with participants and the seminar venue.

Deliverables *(all documents will be delivered via email or other electronic means)*

- ✓ Presentation as described above, 1 draft and 1 final, in Microsoft PowerPoint and PDF formats
- ✓ PDH certificates, one PDF to each seminar participant, emailed within 10 business days after the seminar

Task 5 – Volume 2: SCM Maintenance Manual

This task provides for the development of a SCM Maintenance Manual. The manual is intended to guide property owners and their SCM maintenance designees (i.e., landscapers, property managers, tenants) in understanding, inspecting, and maintaining SCMs. The County's manual will be based on SCM maintenance content developed for other Tennessee local governments.

A draft Table of Contents (TOC) is presented below. Annotations are provided in *blue italics*. It is important to note that this preliminary TOC will likely change as first draft of the volume is created, primarily in terms of nomenclature and structure. The development of content and chapters not included in this TOC may require a change order.

Chapter 1 – Introduction to SCMs *(the hydrologic cycle, primarily rainfall and stormwater generation; and the purpose of SCMs)*

Chapter 2 – SCM Owner Responsibilities *(includes relevant regulations; what an owner can and cannot do with their SCMs)*

Chapter 3 – Locating and identifying SCMs *(includes explanation of relevant County documents, and guidance for locating an SCM, and determining its type)*

Chapter 4 – SCM Inspections *(general information on performing routine inspections)*

Chapter 5 – SCM Maintenance *[general information on performing routine maintenance, what to do if repairs are needed, and who to call for help (e.g., landscape companies, tree companies, wildlife removal companies, etc.)]*

Chapter 6 – SCM maintenance guidance sheets (4 pages maximum) *(includes clearly defined maintenance standards, by SCM type; maintenance standards will tie-back to design specifications to the degree appropriate for a layman audience, and educational checklists for routine inspection, by SCM type)*

A SCM maintenance guidance sheet and inspection checklist will be provided for each of the 11 SCMs that will be included in new Volume 1. Activities for this task include the following.

1. **Policy Review Meeting:** WSP staff will meet with County staff to discuss County SCM inspection and maintenance policies to ensure they are captured accurately in the volume. One in-person meeting is included.
2. **Volume 2 Format:** WSP will prepare an example chapter and stormwater control measure (SCM) maintenance guide for Volume 3 for County review in two different formats that are complementary to Volume 1. WSP will refine the preferred format (i.e., fonts, spacing, colors, headers, footers, etc.) based on County comments. Up to two drafts of the preferred format are included. The final draft will be used for development of Volume 2. One virtual meeting is included. Note: it is assumed the final volume will be created in Microsoft Word.
3. **Drafts 1 and 2:** WSP will prepare two (2) drafts of the volume for review and comment by City staff, and one (1) final version. For each draft, WSP will edit as needed to address County comments. Those comments that WSP cannot resolve independently will be resolved with County assistance.

   Draft 1 will be provided as a single, fully-formatted manual for County review and comment. WSP may initially provide a draft of one SCM maintenance guidance sheet and inspection checklist to all clients to confirm the level of detail and structure are acceptable, before creating content for the other 10 SCM types. WSP will provide review instructions and a checklist of chapters to facilitate County reviews. Up to two (2) 2-hour virtual meetings with WSP are included for comment review and resolution on draft 1.

   WSP's estimated cost was determined assuming the County will perform a thorough review of draft 1 and will provide a detailed comments and instructions for volume edits. This is critical to a cost-effective review process for draft 2, when we should receive far fewer and less significant comments. Incomplete or haphazard reviews of draft 1 as evidenced by comments in draft 2 (that were not identified by the County in draft 1) may result in the need for additional County funds to complete the volume.

   Draft 2 will be provided with edits that alter the context of policies, specifications, and guidance identified with highlights or a different color font for easy identification by County staff. Minor edits (e.g., grammar, spelling, renumbering, restructuring, etc.) will not be shown. WSP will provide a checklist of edit locations to facilitate County reviews. One (2) 1-hour virtual meeting with WSP is included for comment review and resolution on draft 2.
4. **Final Volume:** The final volume will be developed based on comments received on the second draft.

Drafts 1 and 2 of the volume will be provided in Microsoft Word to facilitate use of its 'track changes' function for County reviews. The final version will be provided as:

- a fully navigable PDF of the volume
- navigable PDFs of each individual chapters, except for Chapter 6 which will be provided as PDFs of each maintenance guide and checklist; navigation will include linkages from the Table of Contents and at section call-outs in the body text
- Microsoft Word files of each chapter (Chapter 6 will be provided by section)

Deliverables *(all documents will be delivered via email or other electronic means)*

- ✓ Up to two (2) drafts of SWMM Volume 2 in Microsoft Word
- ✓ Review instructions and checklists
- ✓ One final version of SWMM Volume 2 in Microsoft word and navigable Adobe PDF formats as described above.

Project Schedule

A preliminary schedule by task is provided in Table 1. The schedule is dependent on timely reviews of draft content by the County and any third-party reviewers selected by the County.

Standard Rate Schedule
for WSP Earth & Environment
Effective through December 31, 2026

WSP STANDARD LABOR RATE SCHEDULE

Billing Level	Personnel Category	Hourly Rate (U.S.$)
S1	Assistant, Project Coordination	$83
S2	Coordinator, Administrative Support	$102
S3	Senior Coordinator, Project Coordination	$120
S4	Specialist, Administrative Support	$137
T0	Assistant, Technician	$85
T1	Coordinator, Technician	$104
T2	Senior Coordinator, Technician	$120
T3	Specialist, Technician	$140
T4	Senior Specialist, Technician	$163
T5	Lead Specialist, Technician	$185
P0	Intern, Engineer/Scientist	$85
P1	Assistant Consultant, Engineer/Scientist	$120
P2	Associate Consultant, Engineer/Scientist	$138
P3	Consultant, Engineer/Scientist	$161
P4	Senior Consultant, Engineer/Scientist	$187
P5	Lead Consultant, Engineer/Scientist	$216
P6	Sr. Lead Consultant, Engineer/Scientist	$255
P7	Director, Engineer/Scientist	$296
P8	Senior Director, Engineer/Scientist	$322
L1	Manager, Business Support	$213
L2	Senior Manager, Business Support	$255
L3	Director, Business Support	$299
L4 / E1	Senior / Executive Director	$339

Invoices from WSP Earth & Environment include all labor charges, other direct costs, and costs associated with in-house services. Charges include only those services directly attributable to the execution of the work. Time spent when traveling in the interest of the work will be charged in accordance with the hourly rates. Rates for professional services related to expert testimony, including time spent in depositions and the preparation and presentation of testimony, are available upon request.

Unless otherwise specified, other direct costs, including materials, expenses will be invoiced at cost plus a general and administrative fee of 15%, and subcontractor costs will be invoiced at cost plus a general administrative fee of 10%.

Rates for laboratory services and use of equipment owned by WSP will be provided upon request.

Table 1. Proposed Project Schedule

Task	2026										2027				
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
1. Project Management															
2. Current SWMM Review and Volume 1 Format															
3. Volume 1: Stormwater Design & Construction	<---------- Draft 1 ---------->						Draft 2		Draft 3			Final version			
4. SWMM Volume 1 Seminar												Seminar			
5. Volume 2: SCM Maintenance Manual										Draft 1			Draft 2		Final version

Total Estimated Cost and Terms & Conditions

The total estimated cost of this project, inclusive of all tasks is $152,420.00. Table 2 provides a breakdown of estimated costs by task.

Table 2. Estimated Project Cost by Task

Task	Estimated Cost
1. Project Management	$9,480.00
2. SWMM Review and Volume 1 Format	$6,280.00
3. Volume 1 Preparation	$90,760.00
4. Volume 1 Seminar	$8,230.00
5. SCM Maintenance Manual	$37,670.00
TOTAL ESTIMATED COST	**$152,420.00**

WSP proposes to perform this work on a Time & Materials not to exceed basis in accordance with the attached rate schedule. While care has been taken to project costs by task, certain tasks may take more, or less, labor to complete. Provided that there are no changes to the proposed scope, WSP will execute tasks within the total project budget and not be constrained within individual task budgets.

WSP appreciates the opportunity to provide this proposal to Knox County.

With kind regards,

Mary C. Halley
Stormwater Planning Team Lead
(865) 414-0642
mary.halley@wsp.com

Matthew C. Breen, PE, CFM
Mid-Atlantic Water Resources Service Line Lead

RLA-18281 **R-26-3-501**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COMMUNITY DEVELOPMENT

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the National Opioid Settlement Agreement with Six Regional Distributors/Dispenser Regional Distributors/Dispenser Defendants (Six Remnant Defendants). **(TO BE ADDED)**

(Community Development)

Attachments

Resolution

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE APPROVING THE NATIONAL OPIOID SETTLEMENT AGREEMENT WITH SIX REGIONAL DISTRIBUTORS/DISPENSER DEFENDANTS (SIX REMNANT DEFENDANTS).

RESOLUTION: **R-26-3-501**

REQUESTED BY: **COMMUNITY DEVELOPMENT**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, the opioid epidemic continues to impact communities in the United States, the State of Tennessee, and Knox County, Tennessee; and

WHEREAS, Knox County has suffered harm and will continue to suffer harm as a result of the opioid epidemic; and

WHEREAS, the State of Tennessee and some Tennessee local governments have filed lawsuits against opioid manufacturers, distributors, and retailers, including many

federal lawsuits by Tennessee counties and cities that are pending in the litigation captioned In re: National Prescription Opiate Litigation, MDL No. 2804 (N.D. Ohio) (the MDL case is referred to as the "Opioid Litigation"); and

WHEREAS, Knox County has previously joined settlements with multiple pharmaceutical distributors, manufacturers, and retail pharmacies; and

WHEREAS, a proposed settlement has been reached with Associated Pharmacies, Inc. (and American Associated Pharmacies); J M Smith Corporation; Louisiana Wholesale Drug Company, Inc.; Morris and Dickson Co.; North Carolina Mutual Wholesale Drug Company, Inc.; and United Natural Foods, Inc. (including its subsidiaries SuperValu and Advantage Logistics) (Six Remnant Defendants); and

WHEREAS, Knox County finds the Six Remnant Defendants Settlement acceptable and in the best interest of the community; and

WHEREAS, participation in this settlement by a large majority of Tennessee cities and counties will materially increase the amount of settlement funds that Tennessee will receive from the pending proposed opioid settlement.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

Section 1. That the Knox County Mayor is hereby expressly authorized to execute any formal agreements and related documents evidencing Knox County's agreement to the settlement of claims and litigation specifically related to the Six Remnant Defendants Settlement.

Section 2. That the Knox County Mayor is hereby expressly authorized to take such other action as necessary and appropriate to effectuate Knox County's participation in the Six Remnant Defendants Settlement.

Section 3. That if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

Section 4. That this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

Presiding Officer of the Commission **Date**

County Clerk **Date**

Approved:

County Mayor **Date**

Vetoed:

County Mayor **Date**

RLA-18133 **R-26-3-601**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Melinda Goodman, HEALTH DEPARTMENT
Department:	HEALTH DEPARTMENT
Requires Expenditure of Funds:	YES Funded in Current Budget: NO
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a grant contract in the amount not to exceed $1,755,213.10 with the Tennessee Department of Health for the provision of Parents as Teachers, Temporary Assistance for Needy Families, and Evidence Based Home Visiting Program Services for the period beginning July 1, 2026 and ending on June 30, 2027. (No application or local match required)
(Health Department)

Attachments

Resolution
Grant Contract for PAT-TANF

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A GRANT CONTRACT IN THE AMOUNT NOT TO EXCEED $1,755,213.10 WITH THE TENNESSEE DEPARTMENT OF HEALTH FOR THE PROVISION OF PARENTS AS TEACHERS, TEMPORARY ASSISTANCE FOR NEEDY FAMILIES, AND EVIDENCE BASED HOME VISITING PROGRAM SERVICES FOR THE PERIOD BEGINNING ON JULY 1, 2026 AND ENDING ON JUNE 30, 2027. (NO APPLICATION OR LOCAL MATCH REQUIRED)

RESOLUTION: **R-26-3-601**

REQUESTED BY: **HEALTH DEPARTMENT**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County has received a grant contract from the Tennessee Department of Health for the provision of Parents as Teachers, Temporary Assistance for Needy Families, and Evidence Based Home Visiting Program Services for the period beginning on July 1, 2026 and ending on June 30, 2027; and

WHEREAS, under the terms of the proposed grant contract, the Knox County Health Department will receive the amount not to exceed $1,755,213.10 to provide the aforesaid services, as further defined in the Scope of Services and Deliverables section of the attached grant contract; and

WHEREAS, this grant contract does not require matching funds from Knox County.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The grant contract with the Tennessee Department of Health for the provision of Parents as Teachers, Temporary Assistance for Needy Families, and Evidence Based Home Visiting Program Services is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the grant contract with the Tennessee Department of Health for the provision of Parents as Teachers, Temporary Assistance for Needy Families, and Evidence Based Home Visiting Program Services shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

GOVERNMENTAL GRANT CONTRACT

(cost reimbursement grant contract with a federal or Tennessee local governmental entity or their agents and instrumentalities)

Begin Date	End Date	Agency Tracking #	Edison ID
July 1, 2026	June 30, 2027	34347-80527	

Grantee Legal Entity Name	Edison Vendor ID
Knox County Government dba Knox County Health Department	2830

Subrecipient or Recipient

☒ Subrecipient

☐ Recipient

Assistance Listing Number 93.558

Grantee's fiscal year end June 30

Service Caption (one line only)

Evidence Based Home Visiting Program Services

Funding —

FY	State	Federal	Interdepartmental	Other	TOTAL Grant Contract Amount
2027			$1,755,213.10		$1,755,213.10
TOTAL:			**$1,755,213.10**		**$1,755,213.10**

Grantee Selection Process Summary

☐ Competitive Selection

☒ Non-competitive Selection

The DHS Expansion funding enables the opportunity for all eligible Tennessee vendors to provide MIECHV, TANF and 2G services, therefore eliminating competition among vendors and the need to conduct a competitive process.

Budget Officer Confirmation: There is a balance in the appropriation from which obligations hereunder are required to be paid that is not already encumbered to pay other obligations.

Eric Bucholz

CPO USE - GG

Speed Chart (optional)	Account Code (optional)
HL00012154	71304000

GRANT CONTRACT
BETWEEN THE STATE OF TENNESSEE,
DEPARTMENT OF HEALTH
AND
KNOX COUNTY GOVERNMENT DBA KNOX COUNTY HEALTH DEPARTMENT

This grant contract ("Grant Contract"), by and between the State of Tennessee, Department of Health, hereinafter referred to as the "State" or the "Grantor State Agency" and Grantee Knox County Government dba Knox County Health Department, hereinafter referred to as the "Grantee," is for the provision of Evidence Based Home Visiting Program Services, as further defined in the "SCOPE OF SERVICES AND DELIVERABLES."

Grantee Edison Vendor ID # 2830

A. SCOPE OF SERVICES AND DELIVERABLES:

A.1. The Grantee shall provide the scope of services and deliverables ("Scope") as required, described, and detailed in this Grant Contract.

A.2. The TANF funded EBHV program is not a HIPAA covered program within TDH.

A.3. Service Definitions.

a. Accredited/Certified/Network Partner: Having received current accreditation/certification by Parents As Teachers (PAT).

b. Accrual: A charge for work that has been done but not yet invoiced, for which provision is made at the end of a financial period.

c. CQI: Continuous Quality Improvement, i.e. an initiative that consists of systematic and continuous actions that lead to measurable improvement in EBHV services and processes that maintain model fidelity. These efforts will be supported and monitored by TDH staff and state model consultants. TDH may assign additional CQI projects to the agency as needed.

d. Data Management/Case Management System: The data collection system provided by the state (Apricot 360 Contract Number: National Association of State Procurement Officers (NASPO) Cloud between SHI International Corporation and the State of Tennessee, AR2488 67960) where the Grantee is responsible for entering data for Evidence-Based Home Visiting programs and any specific system required model's national office.

e. Direct Service Home Visitor: Local Implementing Agency (LIA) home visiting staff responsible for maintaining regular contact and support with families through home visitation.

f. Direct Service Staff: Local Implementing Agency (LIA) home visiting staff who work directly with the family, responsible for community outreach, initiating services with families, and completing the initial assessment to determine the family's strengths and areas to address throughout services.

g. Evidence-Based Home Visiting Program/Services (EBHV): A voluntary program for at-risk pregnant women and parents with children up to kindergarten entry. Goals for every program are to improve maternal and child health, prevent child abuse and neglect, encourage positive parenting, and promote child development and school readiness.

h. FTE: Equivalent to a full-time worker.

i. LIA: Local Implementing Agency, i.e. an agency which has entered into an agreement with the Tennessee Department of Health to provide Evidence Based Home Visiting services.

j. Low-Income Family: A family that is living at or below the Federal Poverty Level; is eligible for Medicaid; is a recipient of or eligible for public benefits such as Families First or Supplemental Nutrition Assistance Program (SNAP); is a part of a coordinated entry system through Social Services agencies and has met proof of income; is unemployed or zero-income verified; lives in Section 8 housing or low-rent public housing; or is eligible for free or reduced lunch through the National School Lunch Program.

k. PAT: The Parents As Teachers Evidence-Based Home Visiting Model.

l. TANF: Temporary Assistance for Needy Families, a program that offers states flexibility in serving families of low income. The purpose of TANF is to reduce intergenerational dependency on public benefits by increasing self-sufficiency, education, and economic mobility of families with children.

m. Title V of the Social Security Act: The Maternal and Child Health Services Block Grant Program. For more information, visit: https://www.ssa.gov/OP_Home/ssact/title05/0511.htm

n. "Two-Generation Approach" or "2Gen Approach" or "2Gen": means the foundational framework for DHS' delivery service model, which focuses on curtailing intergenerational poverty. There are four (4) key components of the Two-Generation Approach: 1) Educational Success; 2) Economic Supports; 3) Health and Well-Being; and 4) Social Capital. This Approach includes strengthening and coordinating services to help families achieve stability. https://www.tn.gov/humanservices/building-a-thriving-tennessee-through-2gen/about-2gen-in-tennessee.html

o. www.kidcentraltn.com: An internet website that collects and organizes content from various Tennessee State Departments and other resources providing easily accessible information about health, education, child development and support for Tennessee families.

A.4. Service Goals.

The Grantee shall:

a. Serve women, infants, and children as referenced in Title V of the Social Security Act;

b. Improve coordination of services for at-risk communities;

c. Identify and provide comprehensive services to improve outcomes for eligible families who reside in at-risk communities as defined in Section A.5.;

d. Assure availability and improve the quality of EBHV services in the most at-risk counties in Tennessee; and

e. Strengthen the capacity of Tennessee's home visiting workforce to better implement family-centered, resilience-informed care practices.

A.5. Service Recipients. Families/households enrolled in the EBHV Program who live in Knox County.

A.6. Service Description.

The Grantee shall:

a. Provide EBHV services to pregnant or newly parenting families who meet one (1) or more of the following criteria at enrollment:
   (1) Low-income family (as defined in A.3.j.); all eligible TANF enrollees must meet this requirement.
   (2) Pregnant or first-time mothers under the age of twenty-one (21);
   (3) Has a history of child abuse or neglect or has had interactions with child welfare services;
   (4) Has a history of substance abuse or needs substance abuse treatment;
   (5) Has users of tobacco products in the home;
   (6) Has attained low student achievement or has a child with low student achievement;
   (7) Has a child with developmental delays or disabilities; and/or
   (8) Has an individual who is serving or has formerly served in the Armed Forces.

b. Parents As Teachers (PAT) Local Implementing Agencies (LIAs) will partner with families to increase the knowledge of child development, improve parenting practices, increase children's school readiness and success, provide early detection of developmental delays and health issues, and prevent child abuse and neglect.

c Use at least seventy-five percent (75%) of this grant to provide direct EBHV services.

d. Provide a position description with the expected qualifications for each position funded by this Grant Contract.

e. The Grantee will prioritize services to the clients as outlined in Sections A.5. and A.6.a.

f. The Grantee shall ensure that enrollee participation in EBHV services is voluntary.

g. Remain an Accredited/Certified/Network Partner.

h. Provide home visiting services using the PAT model. The Grantee shall remain in good standing with the model developer throughout the Term and may use grant funds to maintain that good standing. The Grantee shall submit proof of these credentials upon request of the State and notify the State within forty-eight (48) hours of any changes in these credentials.

i. The Continuous Quality Improvement (CQI) initiative consists of systematic and continuous actions that lead to measurable improvement in EBHV services and processes that maintain model fidelity. Sites are required to actively participate in CQI projects as prompted by the state and as required by their respective program model. These CQI initiatives will be supported by TDH staff, including the Quality Assurance/Quality Improvement (QA/QI) Director, the epidemiology team, and model consultants. Sites are encouraged to initiate their own CQI projects in addition to those required by the state or model. These site-driven projects allow for the identification and addressing of local needs and foster improvements in service delivery.

j. Participate in regular EBHV calls to receive important programmatic updates.

k. Each of Grantee's non-administrative personnel shall participate in a minimum of one (1) training as coordinated by the EBHV Workforce Development Director and one (1) annual home visiting summit event. All Grantee non-administrative personnel shall participate in additional training courses required by the State, whether in person or online. The Grantee shall designate funding for travel and associated expenses for all participants unless otherwise directed by the State. The grantee shall attend all required State trainings.

l. Throughout the grant period, work to maintain full caseloads in accordance with the National Home Visiting Program model guidelines for caseload capacity. The Grantee shall maintain a caseload average of at least eighty-five percent (85%) of 210 (14.0 FTE

home visitors with a caseload of 15 per FTE). However, each home visitor shall maintain full caseloads regardless of the number of families already served. Any changes to the proposed number of families served in each county must be submitted to the State for review and approval. If, during the course of enrollment, a new recipient no longer meets the above-listed criteria, he/she may continue enrollment in the EBHV.

(1) The Early Childhood Initiatives (ECI) team permits EBHV LIAs to deliver virtual home visits at the discretion of the home visitor and direct supervisor on a case-by-case basis, if a family and/or home visitor is sick and needs to avoid face-to-face contact while maintaining support to the family. All Evidence-Based Home Visiting (EBHV) Local Implementing Agencies (LIAs) will conduct at least 85% of all home visits in-person.

(2) The grantee must serve a minimum of one family in each county listed in A.5.

m. Ensure all home visitors with a full caseload of clients are compensated by no less than twenty-five percent (25%) of their salary through EBHV funding.

n. New home visitors and supervisors will work to obtain Infant Mental Health Endorsement® through the Association of Infant Mental Health in Tennessee (AIMHiTN). Existing staff shall maintain endorsement by participating in required ongoing training.

o. Grantee will collaborate with the PAT state consultant and will receive technical assistance, including but not limited to on-site visits, meetings, video conferences, phone calls, emails, and resource papers. Grantee will receive a minimum of one quality assurance visit per year.

p. Provide initial and ongoing data collection in a manner designed by the State for purposes of reporting the three (3) performance measures outlined by the Tennessee Department of Human Services.

Collect data in accordance with the following guidelines:

(1) The data shall be collected for eligible families who have been/are enrolled in EBHV Program/Services;

(2) Collect individual-level demographic and service-utilization data for the participants in its program necessary to analyze and understand the children's and families' progress;

(3) Use a Data Management/Case Management System (Apricot 360) for EBHV data collection. The data collected includes individual-level demographic and service-utilization data on the participants in its program as necessary to analyze and understand the progress children and families are making. Individual-level demographic and service-utilization data include, but are not limited to, the following

(i) Family's participation rate in the home visiting program (e.g., number of sessions/numbers of possible sessions, duration of sessions);
(ii) Demographic data for the participant child(ren), pregnant woman, expectant father, parent(s), or primary caregiver(s) receiving home visiting services including: child's sex, age of all (including age in months for child) at each data collection point and racial and ethnic background of all participants in the family;
(iii) Index child's exposure to languages other than English;
(iv) Family socioeconomic indicators (e.g., family income, employment status)
(v) Submit all enrollment data to the Grantor State Agency on

a quarterly basis, no later than fifteen (15) days after the end of each calendar quarter. The LIA shall also submit outcome data to the Grantor State Agency on an ongoing basis. The Grantee shall enter all newly acquired data into a Data Management/Case Management System (Apricot 360) no later than ten (10) business days after collection.

q. Work with the State to maintain an agency program profile in the designated state services directory located at www.kidcentraltn.com. The agency program profile will contain general information about the agency, program eligibility requirements, and agency contact information. The State shall provide instructions for which services should be included in the directory. Grantee shall review its agency program profile(s) in the designated state services directory at least every six (6) months. In addition, Grantee shall notify the State of any updates to the agency program profile(s) within ten (10) business days of any change in information.

(1) If Grantee has a website, they shall link to www.kidcentraltn.com from an appropriate section of that website. If Grantee would like to link to specific features of the kidcentraltn website such as the My Profile, Mobile App, Facebook, or State Services Directory features, the State can provide specific copy, links, and images for those features.

r. Follow the Uniform Administrative Requirements, Cost Principles, and Audit Requirement for ACF Awards by using the link below; 45 C.F.R. § 260.31: https://www.ecfr.gov/current/title-45/subtitle-B/chapter-II/part-260/subpart-A/section-260.31

s. Outcomes Measures: LIAs shall achieve stated benchmarks among families enrolled in EBHV programs in at least four (4) of the six (6) 2Gen key components and benchmark areas below:

1. Improvements in prenatal, maternal and newborn health, including improved pregnancy outcomes.

i. Health & Well-Being - Decrease psychological stress: Improve families' awareness on healthy lifestyle behaviors and available health services and resources.

(I) Ninety percent (90%) of infants (among mothers who enrolled in home visiting prenatally before thirty-seven (37) weeks) will be born at full term following program enrollment.

(ii) Health & Well-Being - Decrease psychological stress: Improve health and well-being of families (physical, mental and emotional health).

(I) Seventy-five percent (75%) of mothers enrolled in home visiting prenatally or within thirty (30) days after delivery will receive a postpartum visit with a healthcare provider within eight (8) weeks (fifty-six (56) days) of delivery.

2. Improvements in child health and development (including the prevention of child injuries and maltreatment) and improvements in cognitive, language, social-emotional and physical developmental indicators.

i. Health & Well-Being - Decrease psychological stress: Improve families' awareness of healthy lifestyle behaviors and available health services and resources.

(I) Seventy-five percent (75%) of infants enrolled in home visiting will always be placed to sleep on their backs, without bed-sharing or soft bedding.

3. Improvements in school readiness and child academic achievement.
   i. Education - Empower parents as their children's first/primary teachers: Increase parent's attendance and involvement in their child's learning activities through workshops, individualized consultations, or other impactful parental education activities.

      (I) Ninety percent (90%) of children enrolled in home visiting that are screened for possible developmental delays (using a validated parent-completed tool) will be offered a referral for intervention/service.

4. Reductions in domestic violence.

   i. Health & Well-Being - Decrease psychological stress: Improve health and well-being of families (physical, mental and emotional health).

      (I) Ninety-three percent (93%) of households enrolled in home visiting will not have a verified case of child maltreatment.

5. Improvements in family economic self-sufficiency.

   i. Economic Supports - Increase Economic Status: Increase participation or enrollment in education and job training opportunities.

      (I) Thirty percent (30%) of primary caregivers enrolled in home visiting without a high school degree (or equivalent) will be enrolled in and maintain continuous enrollment or complete a high school degree (or equivalent) program during their participation.

6. Improvements in the coordination of referrals for, and the provision of, other community resources and supports for eligible families, consistent with the Grantor State Agency child welfare agency training.

   i. Social Capital - Increase Family Engagement: Increase families' knowledge of, access to, and utilization of community resources.

      (I) Ninety percent (90%) of primary caregivers receiving a positive screen for depression will be offered resources/education and a referral for professional services.

   ii. Social Capital - Increase Family Engagement: Increase families' knowledge of, access to, and utilization of community resources.

      (I) Ninety percent (90%) of primary caregivers receiving a positive screen for intimate partner violence (measured using a validated tool) will be offered resources/education and a referral for professional services.

A.7. Service Reporting.

a. The Grantee shall submit outcome data as outlined in Scope A.6.s. to the State on an ongoing basis, with data entered into the Data Management/Case Management systems (Apricot 360) within ten (10) business days of data collection. Data collection shall follow the form and content as specified by the

State. The Grantee shall be responsible for notifying the State of any staffing changes within five (5) business days, including the departure of those staff persons having access to the State's data collection system.

b. The Grantee shall report the progress of the program on a quarterly basis summarizing all program activities and efforts such as recruitment efforts and enrollment, population targets and demographics, staffing and trainings, partnerships, parent and child activities, outcomes, successes, families' involvement in programming, program challenges, and opportunities for growth and development.

c. The Grantee shall provide Accrual data to the Program Director no later than June 15 annually in a format provided by the State.

A.8. Inspection and Acceptance. Acceptance of the work outlined above will be made by the State or its authorized representative through reports, teleconferences, site visits and/or other periodic reviews. The State will make the final determination in terms of acceptance of the work being performed under this Grant Contract.

A.9. Performance Standard. The Grantee hereby acknowledges and agrees that its performance under this Grant Contract shall meet the standards and conditions set forth in Section A of this Grant Contract. If the Grantee fails to meet these standards, the State, at its exclusive option, may allow up to six (6) months for the Grantee to achieve compliance with the standards. If performance deficiencies are not resolved to the satisfaction of the State within the prescribed time, and if no extenuating circumstances can be documented by the Grantee to the State's satisfaction, the State may cancel the Grant Contract at the State's discretion.

A.10. The grantee shall not use contract funds for direct dental, medical, legal and/or mental health services.

A.11. This grant allows for the purchase of electronic devices, such as but not limited to computers, iPads, tablets, and/or laptops for the purpose of carrying out the scopes of services. In the event the Grantee is purchasing these items hereunder, the Grantee shall follow D.27. reporting guidelines.

A.12. This grant allows for the purchase and distribution of prepaid store cards to eligible families as noted in A.5.a, such as but not limited to food and water, infant formula, gas cards, and prepaid grocery cards for the purpose of carrying out the scopes of services. In the event the Grantee is purchasing these items hereunder, the Grantee shall follow **Attachment 1** for purchasing, tracking, reporting and reimbursement guidelines.

A.13. Code of Conduct. The Grantee shall assure that there is a code of conduct in place and applicable to all employees that covers, at minimum, business practices, and service recipient/staff interaction/fraternization. Further, Grantee's personnel shall conduct themselves in conformity with all applicable statutes, rules and regulations, and recognized ethical standards of their profession. Procedures for reporting violations of the ethical standards shall be developed and communicated to staff upon hire and annually thereafter, which shall include a non-reprisal approach for persons reporting suspected violations, as well as a description of possible sanctions for violating the standards. Failure to implement a code of conduct in accordance with this section and to adequately address suspected violations of the code of conduct may be cause for termination of this Grant Contract.

A.14. Incorporation of Federal Award Identification Worksheet. The federal award identification worksheet, which appears as **Attachment 2**, is incorporated in this Grant Contract.

A.15. In the event that the Grantee is subject to an audit in accordance with Section D.19. hereunder, the Grantee shall log in to their account on the Edison Supplier Portal to complete the Information for Audit Purposes (IAP) and End of Fiscal Year (EOFY) eForms.

A.16. No funds awarded under this Grant Contract shall be used for lobbying federal, state, or local officials.

A.17. TDH Funding Limitation. TDH contract funding for LIA FTE executive positions will not exceed 100% across contracts and will be according to the FTE portion each position dedicates to the scope of each contract.

B. TERM OF CONTRACT:

This Grant Contract shall be effective for the period beginning on July 1, 2026 ("Effective Date") and ending on June 30, 2027, ("Term"). The State shall have no obligation to the Grantee for fulfillment of the Scope outside the Term.

C. PAYMENT TERMS AND CONDITIONS:

C.1. Maximum Liability. In no event shall the maximum liability of the State under this Grant Contract exceed One Million Seven Hundred Fifty-Five Thousand Two Hundred Thirteen Dollars and Ten Cents ($1,755,213.10) ("Maximum Liability"). The Grant Budget, attached and incorporated as **Attachment 3** is the maximum amount due the Grantee under this Grant Contract. The Grant Budget line-items include, but are not limited to, all applicable taxes, fees, overhead, and all other direct and indirect costs incurred or to be incurred by the Grantee.

C.2. Compensation Firm. The Maximum Liability of the State is not subject to escalation for any reason unless amended. The Grant Budget amounts are firm for the duration of the Grant Contract and are not subject to escalation for any reason unless amended, except as provided in Section C.6.

C.3. Payment Methodology. The Grantee shall be reimbursed for actual, reasonable, and necessary costs based upon the Grant Budget, not to exceed the Maximum Liability established in Section C.1. Upon progress toward the completion of the Scope, as described in Section A of this Grant Contract, the Grantee shall submit invoices **(Attachment 4)** prior to any reimbursement of allowable costs.

C.4. Travel Compensation. Reimbursement to the Grantee for travel, meals, or lodging shall be subject to amounts and limitations specified in the "State Comprehensive Travel Regulations," as they are amended from time to time, and shall be contingent upon and limited by the Grant Budget funding for said reimbursement.

C.5. Invoice Requirements. The Grantee shall invoice the State no more often than monthly, with all necessary supporting documentation, and present such to:

By Email:

Lisa.McAfee@tn.gov

Or

Lisa McAfee, Public Health Program Director
Tennessee Department of Health
Division of Family Health and Wellness
Andrew Johnson Tower 7th Floor
710 James Robertson Parkway
Nashville, TN 37243
Lisa.McAfee@tn.gov
Telephone # (615) 532-0422

a. Each invoice shall clearly and accurately detail all of the following required information (calculations must be extended and totaled correctly).

(1) Invoice/Reference Number (assigned by the Grantee).
(2) Invoice Date.
(3) Invoice Period (to which the reimbursement request is applicable).
(4) Grant Contract Number (assigned by the State).
(5) Grantor: Department of Health, Division of Family Health and Wellness.
(6) Grantor Number (assigned by the Grantee to the above-referenced Grantor).
(7) Grantee Name.
(8) Grantee Tennessee Edison Registration ID Number Referenced in Preamble of this Grant Contract.
(9) Grantee Remittance Address.
(10) Grantee Contact for Invoice Questions (name, phone, or fax).
(11) Itemization of Reimbursement Requested for the Invoice Period— it must detail, at minimum, all of the following:

i. The amount requested by Grant Budget line-item (including any travel expenditure reimbursement requested and for which documentation and receipts, as required by "State Comprehensive Travel Regulations," are attached to the invoice).
ii. The amount reimbursed by Grant Budget line-item to date.
iii. The total amount reimbursed under the Grant Contract to date.
iv. The total amount requested (all line-items) for the Invoice Period.

b. The Grantee understands and agrees to all of the following.

(1) An invoice under this Grant Contract shall include only reimbursement requests for actual, reasonable, and necessary expenditures required in the delivery of service described by this Grant Contract and shall be subject to the Grant Budget and any other provision of this Grant Contract relating to allowable reimbursements.
(2) An invoice under this Grant Contract shall not include any reimbursement request for future expenditures.
(3) An invoice under this Grant Contract shall initiate the timeframe for reimbursement only when the State is in receipt of the invoice, and the invoice meets the minimum requirements of this section C.5.
(4) An invoice under this Grant Contract shall be presented to the State within thirty (30) days after the end of the calendar month in which the subject costs were incurred or services were rendered by the Grantee. An invoice submitted more than thirty (30) days after such date will NOT be paid. The State will not deem such Grantee costs to be allowable and reimbursable by the State unless, at the sole discretion of the State, the failure to submit a timely invoice is warranted. The Grantee shall submit a special, written request for reimbursement with any such untimely invoice. The request must detail the reason the invoice is untimely as well as the Grantee's plan for submitting future invoices as required, and it must be signed by a Grantee agent that would be authorized to sign this Grant Contract.

C.6. Budget Line-items. Expenditures, reimbursements, and payments under this Grant Contract shall adhere to the Grant Budget. The Grantee may move up to twenty percent (20%) of a line-item amount to another line-item category provided that any increase is off-set by an equal reduction of other line-item amount(s) and the total Grant Contract amount detailed by the Grant Budget does not increase. An increase of any line item funded at zero dollars ($0.00) shall require prior approval of the Grantor State Agency.

C.7. Disbursement Reconciliation and Close Out. The Grantee shall submit a grant disbursement reconciliation report within thirty (30) days following the end of each quarter and a final invoice and final grant disbursement reconciliation report within forty-five (45) days of the Grant Contract end date and in form and substance acceptable to the State (**Attachment 5**).

a. If total disbursements by the State pursuant to this Grant Contract exceed the amounts permitted by the section C, payment terms and conditions of this Grant Contract, the Grantee shall refund the difference to the State. The Grantee shall submit the refund with the final grant disbursement reconciliation report.

b. The State shall not be responsible for the payment of any invoice submitted to the State after the grant disbursement reconciliation report. The State will not deem any Grantee costs submitted for reimbursement after the grant disbursement reconciliation report to be allowable and reimbursable by the State, and such invoices will NOT be paid.

c. The Grantee's failure to provide a final grant disbursement reconciliation report to the State as required by this Grant Contract shall result in the Grantee being deemed ineligible for reimbursement under this Grant Contract, and the Grantee shall be required to refund any and all payments by the State pursuant to this Grant Contract.

d. The Grantee must close out its accounting records at the end of the Term in such a way that reimbursable expenditures and revenue collections are NOT carried forward.

C.8. Indirect Cost. Should the Grantee request reimbursement for indirect costs, the Grantee must submit to the State a copy of the indirect cost rate approved by the cognizant federal agency or the cognizant state agency, as applicable. The Grantee will be reimbursed for indirect costs in accordance with the approved indirect cost rate and amounts and limitations specified in the attached Grant Budget. Once the Grantee makes an election and treats a given cost as direct or indirect, it must apply that treatment consistently and may not change during the Term. Any changes in the approved indirect cost rate must have prior approval of the cognizant federal agency or the cognizant state agency, as applicable. If the indirect cost rate is provisional during the Term, once the rate becomes final, the Grantee agrees to remit any overpayment of funds to the State, and subject to the availability of funds the State agrees to remit any underpayment to the Grantee.

C.9. Cost Allocation. If any part of the costs to be reimbursed under this Grant Contract are joint costs involving allocation to more than one program or activity, such costs shall be allocated and reported in accordance with the provisions of Central Procurement Office Policy Statement 2013-007 or any amendments or revisions made to this policy statement during the Term.

C.10. Payment of Invoice. A payment by the State shall not prejudice the State's right to object to or question any reimbursement, invoice, or related matter. A payment by the State shall not be construed as acceptance of any part of the work or service provided or as approval of any amount as an allowable cost.

C.11. Non-allowable Costs. Any amounts payable to the Grantee shall be subject to reduction for amounts included in any invoice or payment that are determined by the State, on the basis of audits or monitoring conducted in accordance with the terms of this Grant Contract, to constitute unallowable costs.

C.12. State's Right to Set Off. The State reserves the right to set off or deduct from amounts that are or shall become due and payable to the Grantee under this Grant Contract or under any other agreement between the Grantee and the State of Tennessee under which the Grantee has a right to receive payment from the State.

C.13. Prerequisite Documentation. The Grantee shall not invoice the State under this Grant Contract until the State has received the following, properly completed documentation.

a. The Grantee shall complete, sign, and return to the State an "Authorization Agreement for Automatic Deposit (ACH Credits) Form" provided by the State. By doing so, the Grantee acknowledges and agrees that, once this form is received by the State, all payments to the Grantee under this or any other grant contract will be made by automated clearing house ("ACH").

b. The Grantee shall complete, sign, and return to the State the State-provided W-9 form. The taxpayer identification number on the W-9 form must be the same as the Grantee's Federal Employer Identification Number or Social Security Number referenced in the Grantee's Edison registration information.

D. STANDARD TERMS AND CONDITIONS:

D.1. Required Approvals. The State is not bound by this Grant Contract until it is signed by the parties and approved by appropriate officials in accordance with applicable Tennessee laws and regulations (depending upon the specifics of this Grant Contract, the officials may include, but are not limited to, the Commissioner of Finance and Administration, the Commissioner of Human Resources, and the Comptroller of the Treasury).

D.2. Modification and Amendment. This Grant Contract may be modified only by a written amendment signed by all parties and approved by the officials who approved the Grant Contract and, depending upon the specifics of the Grant Contract as amended, any additional officials required by Tennessee laws and regulations (the officials may include, but are not limited to, the Commissioner of Finance and Administration, the Commissioner of Human Resources, and the Comptroller of the Treasury).

D.3. Termination for Convenience. The State may terminate this Grant Contract without cause for any reason. A termination for convenience shall not be a breach of this Grant Contract by the State. The State shall give the Grantee at least thirty (30) days written notice before the effective termination date. The Grantee shall be entitled to compensation for authorized expenditures and satisfactory services completed as of the termination date, but in no event shall the State be liable to the Grantee for compensation for any service that has not been rendered. The final decision as to the amount for which the State is liable shall be determined by the State. The Grantee shall not have any right to any actual general, special, incidental, consequential, or any other damages whatsoever of any description or amount for the State's exercise of its right to terminate for convenience.

D.4. Termination for Cause. If the Grantee fails to properly perform its obligations under this Grant Contract, or if the Grantee violates any terms of this Grant Contract, the State shall have the right to immediately terminate this Grant Contract and withhold payments in excess of fair compensation for completed services. Notwithstanding the exercise of the State's right to terminate this Grant Contract for cause, the Grantee shall not be relieved of liability to the State for damages sustained by virtue of any breach of this Grant Contract by the Grantee.

D.5. Subcontracting. The Grantee shall not assign this Grant Contract or enter into a subcontract for any of the services performed under this Grant Contract without obtaining the prior written approval of the State. If such subcontracts are approved by the State, each shall contain, at a minimum, sections of this Grant Contract pertaining to "Conflicts of Interest," "Lobbying," "Nondiscrimination," "Public Accountability," "Public Notice," and "Records" (as identified by the section headings). Notwithstanding any use of approved subcontractors, the Grantee shall remain responsible for all work performed.

D.6. Conflicts of Interest. The Grantee warrants that no part of the total Grant Contract Amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Grantee in connection with any work contemplated or performed relative to this Grant Contract.

D.7. Lobbying. The Grantee certifies, to the best of its knowledge and belief, that:

a. No federally appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into

of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this contract, grant, loan, or cooperative agreement, the Grantee shall complete and submit Standard Form-LLL, “Disclosure of Lobbying Activities," in accordance with its instructions.

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

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

D.8. Communications and Contacts. All instructions, notices, consents, demands, or other communications required or contemplated by this Grant Contract shall be in writing and shall be made by certified, first class mail, return receipt requested and postage prepaid, by overnight courier service with an asset tracking system, or by email or facsimile transmission with recipient confirmation. All communications, regardless of method of transmission, shall be addressed to the respective party as set out below:

The State:

Lisa McAfee, Public Health Program Director
Tennessee Department of Health
Division of Family Health and Wellness
Andrew Johnson Tower 7th Floor
710 James Robertson Parkway
Nashville, TN 37243
Lisa.McAfee@tn.gov
Telephone # (615) 532-0422

The Grantee:

Kevin Parton, Senior Director
Knox County Government dba Knox County Health Department
140 Dameron Avenue
Knoxville, TN 37917-6434
thdcontracts@knoxcounty.org
Telephone # (865)215-5273

A change to the above contact information requires written notice to the person designated by the other party to receive notice.

All instructions, notices, consents, demands, or other communications shall be considered effectively given upon receipt or recipient confirmation as may be required.

D.9. Subject to Funds Availability. This Grant Contract is subject to the appropriation and availability of State or Federal funds. In the event that the funds are not appropriated or are otherwise unavailable, the State reserves the right to terminate this Grant Contract upon written notice to the Grantee. The State’s right to terminate this Grant Contract due to lack of funds is not a breach of this Grant Contract by the State. Upon receipt of the written notice, the Grantee shall cease all work associated with the Grant Contract. Should such an event occur, the Grantee shall be entitled to compensation for all satisfactory and authorized services completed as of the

termination date. Upon such termination, the Grantee shall have no right to recover from the State any actual, general, special, incidental, consequential, or any other damages whatsoever of any description or amount.

D.10. Nondiscrimination. The Grantee hereby agrees, warrants, and assures that no person shall be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of this Grant Contract or in the employment practices of the Grantee on the grounds of handicap or disability, age, race, color, religion, sex, national origin, or any other classification protected by federal, Tennessee state constitutional, or statutory law. The Grantee shall, upon request, show proof of nondiscrimination and shall post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

D.11. HIPAA Compliance. As applicable, the State and the Grantee shall comply with obligations under the Health Insurance Portability and Accountability Act of 1996 (HIPAA), Health Information Technology for Economic and Clinical Health Act (HITECH) and any other relevant laws and regulations regarding privacy (collectively the "Privacy Rules"). The obligations set forth in this Section shall survive the termination of this Grant Contract.

a. The Grantee warrants to the State that it is familiar with the requirements of the Privacy Rules and will comply with all applicable HIPAA requirements in the course of this Grant Contract.

b. The Grantee warrants that it will cooperate with the State, including cooperation and coordination with State privacy officials and other compliance officers required by the Privacy Rules, in the course of performance of this Grant Contract so that both parties will be in compliance with the Privacy Rules.

c. The State and the Grantee will sign documents, including but not limited to business associate agreements, as required by the Privacy Rules and that are reasonably necessary to keep the State and the Grantee in compliance with the Privacy Rules. This provision shall not apply if information received by the State under this Grant Contract is NOT "protected health information" as defined by the Privacy Rules, or if the Privacy Rules permit the State to receive such information without entering into a business associate agreement or signing another such document.

D.12. Public Accountability. If the Grantee is subject to Tenn. Code Ann. § 8-4-401 *et seq*., or if this Grant Contract involves the provision of services to citizens by the Grantee on behalf of the State, the Grantee agrees to establish a system through which recipients of services may present grievances about the operation of the service program. The Grantee shall also display in a prominent place, located near the passageway through which the public enters in order to receive Grant supported services, a sign at least eleven inches (11") in height and seventeen inches (17") in width stating:

NOTICE: THIS AGENCY IS A RECIPIENT OF TAXPAYER FUNDING. IF YOU OBSERVE AN AGENCY DIRECTOR OR EMPLOYEE ENGAGING IN ANY ACTIVITY WHICH YOU CONSIDER TO BE ILLEGAL, IMPROPER, OR WASTEFUL, PLEASE CALL THE STATE COMPTROLLER'S TOLL-FREE HOTLINE: 1-800-232-5454.

The sign shall be on the form prescribed by the Comptroller of the Treasury. The Grantor State Agency shall obtain copies of the sign from the Comptroller of the Treasury, and upon request from the Grantee, provide Grantee with any necessary signs.

D.13. Public Notice. All notices, informational pamphlets, press releases, research reports, signs, and similar public notices prepared and released by the Grantee in relation to this Grant Contract shall include the statement, "This project is funded under a grant contract with the State of Tennessee." All notices by the Grantee in relation to this Grant Contract shall be approved by the State.

D.14. Licensure. The Grantee, its employees, and any approved subcontractor shall be licensed pursuant to all applicable federal, state, and local laws, ordinances, rules, and regulations and shall upon request provide proof of all licenses.

D.15. Records. The Grantee and any approved subcontractor shall maintain documentation for all charges under this Grant Contract. The books, records, and documents of the Grantee and any approved subcontractor, insofar as they relate to work performed or money received under this Grant Contract, shall be maintained in accordance with applicable Tennessee law. In no case shall the records be maintained for a period of less than five (5) full years from the date of the final payment. The Grantee's records shall be subject to audit at any reasonable time and upon reasonable notice by the Grantor State Agency, the Comptroller of the Treasury, or their duly appointed representatives.

The records shall be maintained in accordance with Governmental Accounting Standards Board (GASB) Accounting Standards or the Financial Accounting Standards Board (FASB) Accounting Standards Codification, as applicable, and any related AICPA Industry Audit and Accounting guides.

In addition, documentation of grant applications, budgets, reports, awards, and expenditures will be maintained in accordance with U.S. Office of Management and Budget's *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*.

Grant expenditures shall be made in accordance with local government purchasing policies and procedures and purchasing procedures for local governments authorized under state law.

The Grantee shall also comply with any recordkeeping and reporting requirements prescribed by the Tennessee Comptroller of the Treasury.

The Grantee shall establish a system of internal controls that utilize the COSO Internal Control - Integrated Framework model as the basic foundation for the internal control system. The Grantee shall incorporate any additional Comptroller of the Treasury directives into its internal control system.

Any other required records or reports which are not contemplated in the above standards shall follow the format designated by the head of the Grantor State Agency, the Central Procurement Office, or the Commissioner of Finance and Administration of the State of Tennessee.

D.16. Monitoring. The Grantee's activities conducted and records maintained pursuant to this Grant Contract shall be subject to monitoring and evaluation by the State, the Comptroller of the Treasury, or their duly appointed representatives.

D.17. Progress Reports. The Grantee shall submit brief, periodic, progress reports to the State as requested.

D.18. Annual and Final Reports. The Grantee shall submit, within three (3) months of the conclusion of each year of the Term, an annual report. For grant contracts with a term of less than one (1) year, the Grantee shall submit a final report within three (3) months of the conclusion of the Term. For grant contracts with multiyear terms, the final report will take the place of the annual report for the final year of the Term. The Grantee shall submit annual and final reports to the Grantor State Agency. At minimum, annual and final reports shall include: (a) the Grantee's name; (b) the Grant Contract's Edison identification number, Term, and total amount; (c) a narrative section that describes the program's goals, outcomes, successes and setbacks, whether the Grantee used benchmarks or indicators to determine progress, and whether any proposed activities were not completed; and (d) other relevant details requested by the Grantor State Agency. Annual and final report documents to be completed by the Grantee shall appear on the Grantor State Agency's website or as an **Attachment 6** to the Grant Contract.

D.19. Audit Report. The Grantee shall be audited in accordance with applicable Tennessee law.

At least ninety (90) days before the end of its fiscal year, the Grantee shall complete the Information for Audit Purposes ("IAP") form online (accessible through the Edison Supplier portal) to notify the State whether or not Grantee is subject to an audit. The Grantee should submit only

one, completed form online during the Grantee's fiscal year. Immediately after the fiscal year has ended, the Grantee shall fill out the End of Fiscal Year ("EOFY") (accessible through the Edison Supplier portal).

When a federal single audit is required, the audit shall be performed in accordance with U.S. Office of Management and Budget's *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*.

A copy of the audit report shall be provided to the Comptroller by the licensed, independent public accountant. Audit reports shall be made available to the public.

D.20. Procurement. If other terms of this Grant Contract allow reimbursement for the cost of goods, materials, supplies, equipment, or contracted services, such procurement shall be made on a competitive basis, including the use of competitive bidding procedures, where practical. The Grantee shall maintain documentation for the basis of each procurement for which reimbursement is paid pursuant to this Grant Contract. In each instance where it is determined that use of a competitive procurement method is not practical, supporting documentation shall include a written justification for the decision and for use of a non-competitive procurement. If the Grantee is a subrecipient, the Grantee shall comply with 2 C.F.R. §§ 200.317—200.327 when procuring property and services under a federal award.

The Grantee shall obtain prior approval from the State before purchasing any equipment under this Grant Contract.

For purposes of this Grant Contract, the term "equipment" shall include any article of nonexpendable, tangible, personal property having a useful life of more than one year and an acquisition cost which equals or exceeds ten thousand dollars ($10,000.00).

D.21. Strict Performance. Failure by any party to this Grant Contract to insist in any one or more cases upon the strict performance of any of the terms, covenants, conditions, or provisions of this Grant Contract is not a waiver or relinquishment of any term, covenant, condition, or provision. No term or condition of this Grant Contract shall be held to be waived, modified, or deleted except by a written amendment signed by the parties.

D.22. Independent Contractor. The parties shall not act as employees, partners, joint venturers, or associates of one another in the performance of this Grant Contract. The parties acknowledge that they are independent contracting entities and that nothing in this Grant Contract shall be construed to create a principal/agent relationship or to allow either to exercise control or direction over the manner or method by which the other transacts its business affairs or provides its usual services. The employees or agents of one party shall not be deemed or construed to be the employees or agents of the other party for any purpose whatsoever.

D.23. Limitation of State's Liability. The State shall have no liability except as specifically provided in this Grant Contract. In no event will the State be liable to the Grantee or any other party for any lost revenues, lost profits, loss of business, loss of grant funding, decrease in the value of any securities or cash position, time, money, goodwill, or any indirect, special, incidental, punitive, exemplary or consequential damages of any nature, whether based on warranty, contract, statute, regulation, tort (including but not limited to negligence), or any other legal theory that may arise under this Grant Contract or otherwise. The State's total liability under this Grant Contract (including any exhibits, schedules, amendments or other attachments to the Contract) or otherwise shall under no circumstances exceed the Maximum Liability originally established in Section C.1 of this Grant Contract. This limitation of liability is cumulative and not per incident.

D.24. Force Majeure. "Force Majeure Event" means fire, flood, earthquake, elements of nature or acts of God, wars, riots, civil disorders, rebellions or revolutions, acts of terrorism or any other similar cause beyond the reasonable control of the party except to the extent that the non-performing party is at fault in failing to prevent or causing the default or delay, and provided that the default or delay cannot reasonably be circumvented by the non-performing party through the use of alternate sources, workaround plans or other means. A strike, lockout or labor dispute shall not excuse either party from its obligations under this Grant Contract. Except as set forth in this

Section, any failure or delay by a party in the performance of its obligations under this Grant Contract arising from a Force Majeure Event is not a default under this Grant Contract or grounds for termination. The non-performing party will be excused from performing those obligations directly affected by the Force Majeure Event, and only for as long as the Force Majeure Event continues, provided that the party continues to use diligent, good faith efforts to resume performance without delay. The occurrence of a Force Majeure Event affecting Grantee's representatives, suppliers, subcontractors, customers or business apart from this Grant Contract is not a Force Majeure Event under this Grant Contract. Grantee will promptly notify the State of any delay caused by a Force Majeure Event (to be confirmed in a written notice to the State within one (1) day of the inception of the delay) that a Force Majeure Event has occurred, and will describe in reasonable detail the nature of the Force Majeure Event. If any Force Majeure Event results in a delay in Grantee's performance longer than forty-eight (48) hours, the State may, upon notice to Grantee: (a) cease payment of the fees until Grantee resumes performance of the affected obligations; or (b) immediately terminate this Grant Contract or any purchase order, in whole or in part, without further payment except for fees then due and payable. Grantee will not increase its charges under this Grant Contract or charge the State any fees other than those provided for in this Grant Contract as the result of a Force Majeure Event.

D.25. Tennessee Department of Revenue Registration. The Grantee shall comply with all applicable registration requirements contained in Tenn. Code Ann. §§ 67-6-601 – 608. Compliance with applicable registration requirements is a material requirement of this Grant Contract.

D.26. Charges to Service Recipients Prohibited. The Grantee shall not collect any amount in the form of fees or reimbursements from the recipients of any service provided pursuant to this Grant Contract.

D.27. State Interest in Equipment or Motor Vehicles. The Grantee shall take legal title to all equipment or motor vehicles purchased totally or in part with funds provided under this Grant Contract, subject to the State's equitable interest therein, to the extent of its *pro rata* share, based upon the State's contribution to the purchase price. The term "equipment" shall include any article of nonexpendable, tangible, personal property having a useful life of more than one year and an acquisition cost which equals or exceeds ten thousand dollars ($10,000.00). The term "motor vehicle" shall include any article of tangible personal property that is required to be registered under the "Tennessee Motor Vehicle Title and Registration Law", Tenn. Code Ann. Title 55, Chapters 1-6.

As authorized by the Tennessee Uniform Commercial Code, Tenn. Code Ann. Title 47, Chapter 9 and the "Tennessee Motor Vehicle Title and Registration Law," Tenn. Code Ann. Title 55, Chapters 1-6, the parties intend this Grant Contract to create a security interest in favor of the State in the equipment or motor vehicles acquired by the Grantee pursuant to the provisions of this Grant Contract. A further intent of this Grant Contract is to acknowledge and continue the security interest in favor of the State in the equipment or motor vehicles acquired by the Grantee pursuant to the provisions of this program's prior year Grant Contracts between the State and the Grantee.

The Grantee grants the State a security interest in all equipment or motor vehicles acquired in whole or in part by the Grantee under this Grant Contract. This Grant Contract is intended to be a security agreement pursuant to the Uniform Commercial Code for any of the equipment or motor vehicles herein specified which, under applicable law, may be subject to a security interest pursuant to the Uniform Commercial Code, and the Grantee hereby grants the State a security interest in said equipment or motor vehicles. The Grantee agrees that the State may file this Grant Contract or a reproduction thereof, in any appropriate office, as a financing statement for any of the equipment or motor vehicles herein specified. Any reproduction of this or any other security agreement or financing statement shall be sufficient as a financing statement. In addition, the Grantee agrees to execute and deliver to the State, upon the State's request, any financing statements, as well as extensions, renewals, and amendments thereof, and reproduction of this Grant Contract in such form as the State may require to perfect a security interest with respect to said equipment or motor vehicles. The Grantee shall pay all costs of filing such financing statements and any extensions, renewals, amendments and releases thereof, and

shall pay all reasonable costs and expenses of any record searches for financing statements the State may reasonably require. Without the prior written consent of the State, the Grantee shall not create or suffer to be created pursuant to the Uniform Commercial Code any other security interest in said equipment or motor vehicles, including replacements and additions thereto. Upon the Grantee's breach of any covenant or agreement contained in this Grant Contract, including the covenants to pay when due all sums secured by this Grant Contract, the State shall have the remedies of a secured party under the Uniform Commercial Code and, at the State's option, may also invoke the remedies herein provided.

The Grantee agrees to be responsible for the accountability, maintenance, management, and inventory of all property purchased totally or in part with funds provided under this Grant Contract. The Grantee shall maintain a perpetual inventory system for all equipment or motor vehicles purchased with funds provided under this Grant Contract and shall submit an inventory control report which must include, at a minimum, the following:

a. Description of the equipment or motor vehicles;
b. Vehicle identification number;
c. Manufacturer's serial number or other identification number, when applicable;
d. Acquisition date, cost, and check number;
e. Fund source, State Grant number, or other applicable fund source identification;
f. Percentage of state funds applied to the purchase;
g. Location within the Grantee's operations where the equipment or motor vehicle is used
h. Condition of the property or disposition date if Grantee no longer has possession;
i. Depreciation method, if applicable; and
j. Monthly depreciation amount, if applicable.

The Grantee shall tag equipment or motor vehicles with an identification number which is cross referenced to the equipment or motor vehicle item on the inventory control report. The Grantee shall inventory equipment or motor vehicles annually. The Grantee must compare the results of the inventory with the inventory control report and investigate any differences. The Grantee must then adjust the inventory control report to reflect the results of the physical inventory and subsequent investigation.

The Grantee shall submit its inventory control report of all equipment or motor vehicles purchased with funding through this Grant Contract within thirty (30) days of its end date and in form and substance acceptable to the State. This inventory control report shall contain, at a minimum, the requirements specified above for inventory control. The Grantee shall notify the State, in writing, of any equipment or motor vehicle loss describing the reasons for the loss. Should the equipment or motor vehicles be destroyed, lost, or stolen, the Grantee shall be responsible to the State for the *pro rata* amount of the residual value at the time of loss based upon the State's original contribution to the purchase price.

Upon termination of the Grant Contract, where a further contractual relationship is not entered into, or at another time during the term of the Grant Contract, the Grantee shall request written approval from the State for any proposed disposition of equipment or motor vehicles purchased with Grant funds. All equipment or motor vehicles shall be disposed of in such a manner as the parties may agree from among alternatives approved by the Tennessee Department of General Services as appropriate and in accordance with any applicable federal laws or regulations.

D.28. State and Federal Compliance. The Grantee shall comply with all applicable state and federal laws and regulations in the performance of this Grant Contract. The U.S. Office of Management and Budget's Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards is available here: http://www.ecfr.gov/cgi-bin/text-idx?SID=c6b2f053952359ba94470ad3a7c1a975&tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl

D.29. Governing Law. This Grant Contract shall be governed by and construed in accordance with the laws of the State of Tennessee, without regard to its conflict or choice of law rules. The Grantee agrees that it will be subject to the exclusive jurisdiction of the courts of the State of Tennessee in

actions that may arise under this Grant Contract. The Grantee acknowledges and agrees that any rights or claims against the State of Tennessee or its employees hereunder, and any remedies arising there from, shall be subject to and limited to those rights and remedies, if any, available under Tenn. Code Ann. §§ 9-8-101 through 9-8-408.

D.30. Completeness. This Grant Contract is complete and contains the entire understanding between the parties relating to the subject matter contained herein, including all the terms and conditions agreed to by the parties. This Grant Contract supersedes any and all prior understandings, representations, negotiations, or agreements between the parties, whether written or oral.

D.31. Severability. If any terms and conditions of this Grant Contract are held to be invalid or unenforceable as a matter of law, the other terms and conditions shall not be affected and shall remain in full force and effect. To this end, the terms and conditions of this Grant Contract are declared severable.

D.32. Headings. Section headings are for reference purposes only and shall not be construed as part of this Grant Contract.

D.33. Iran Divestment Act. The requirements of Tenn. Code Ann. § 12-12-101, *et seq.*, addressing contracting with persons as defined at Tenn. Code Ann. §12-12-103(5) that engage in investment activities in Iran, shall be a material provision of this Grant Contract. The Grantee certifies, under penalty of perjury, that to the best of its knowledge and belief that it is not on the list created pursuant to Tenn. Code Ann. § 12-12-106.

D.34. Debarment and Suspension. The Grantee certifies, to the best of its knowledge and belief, that it, its current and future principals, its current and future subcontractors and their principals:

a. are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal or state department or agency;

b. have not within a three (3) year period preceding this Grant Contract been convicted of, or had a civil judgment rendered against them from commission of fraud, or a criminal offence in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or grant under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;

c. are not presently indicted or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses detailed in section b. of this certification; and

d. have not within a three (3) year period preceding this Grant Contract had one or more public transactions (federal, state, or local) terminated for cause or default.

The Grantee shall provide immediate written notice to the State if at any time it learns that there was an earlier failure to disclose information or that due to changed circumstances, its principals or the principals of its subcontractors are excluded or disqualified, or presently fall under any of the prohibitions of sections a-d.

D.35. Confidentiality of Records. Strict standards of confidentiality of records and information shall be maintained in accordance with the requirements of this Grant Contract and applicable state and federal law. All material, information, and data regardless of form, medium or method of communication, that the Grantee will have access to, acquire, or is provided to the Grantee by the State or acquired by the Grantee on behalf of the State shall be regarded as “Confidential Information.” The State grants the Grantee a limited license to use the Confidential Information but only to perform its obligations under the Grant Contract. Nothing in this Section shall permit Grantee to disclose any Confidential Information, regardless of whether it has been disclosed or

made available to the Grantee due to intentional or negligent actions or inactions of agents of the State or third parties. Confidential Information shall not be disclosed except as required under state or federal law or otherwise authorized in writing by the State. Grantee shall take all necessary steps to safeguard the confidentiality of such Confidential Information in conformance with the requirements of this Grant Contract and with applicable state and federal law.

As long as the Grantee maintains State Confidential Information, the obligations set forth in this Section shall survive the termination of this Grant Contract.

D.36. State Sponsored Insurance Plan Enrollment. The Grantee warrants that it will not enroll or permit its employees, officials, or employees of contractors to enroll or participate in a state sponsored health insurance plan through their employment, official, or contractual relationship with Grantee unless Grantee first demonstrates to the satisfaction of the Department of Finance and Administration that it and any contract entity satisfies the definition of a governmental or quasigovernmental entity as defined by federal law applicable to ERISA.

E. SPECIAL TERMS AND CONDITIONS:

E.1. Conflicting Terms and Conditions. Should any of these special terms and conditions conflict with any other terms and conditions of this Grant Contract, the special terms and conditions shall be subordinate to the Grant Contract's other terms and conditions.

E.2. Printing Authorization. The Grantee agrees that no publication coming within the jurisdiction of Tenn. Code Ann.§§ 12-7-101, et seq., shall be printed pursuant to this Grant Contract unless a printing authorization number has been obtained and affixed as required by Tenn. Code Ann. § 12-7-103(d).

E.3. Work Papers Subject to Review. The Grantee shall make all audit, accounting, or financial analysis work papers, notes, and other documents available for review by the Comptroller of the Treasury or his representatives, upon request, during normal working hours either while the analysis is in progress or subsequent to the completion of this Grant Contract.

E.4. Environmental Tobacco Smoke. Pursuant to the provisions of the federal "Pro-Children Act of 1994" and the "Children's Act for Clean Indoor Air of 1995," Tenn. Code Ann. §§ 39-17-1601 through 1606, the Grantee shall prohibit smoking of tobacco products within any indoor premises in which services are provided to individuals under the age of eighteen (18) years. The Grantee shall post "no smoking" signs in appropriate, permanent sites within such premises. This prohibition shall be applicable during all hours, not just the hours in which children are present. Violators of the prohibition may be subject to civil penalties and fines. This prohibition shall apply to and be made part of any subcontract related to this Grant Contract.

E.5. Equal Opportunity. As a condition for receipt of grant funds, the Grantee agrees to comply with 41 C.F. R. § 60-1.4 as that section is amended from time to time during the term.

E.6. Americans with Disabilities Act. The Grantee must comply with the Americans with Disabilities Act (ADA) of 1990, as amended, including implementing regulations codified at 28 CFR Part 35 "Nondiscrimination on the Basis of Disability in State and Local Government Services" and at 28 CFR Part 36 "Nondiscrimination on the Basis of Disability in Public Accommodations and Commercial Facilities," and any other laws or regulations governing the provision of services to persons with a disability, as applicable. For more information, please visit the ADA website: http://www.ada.gov.

E.7. Federal Funding Accountability and Transparency Act (FFATA).

This Grant Contract requires the Grantee to provide supplies or services that are funded in whole or in part by federal funds that are subject to FFATA. The Grantee is responsible for ensuring that all applicable FFATA requirements, including but not limited to those below, are met and that the Grantee provides information to the State as required.

The Grantee shall comply with the following:

a. Reporting of Total Compensation of the Grantee's Executives.

(1) The Grantee shall report the names and total compensation of each of its five most highly compensated executives for the Grantee's preceding completed fiscal year, if in the Grantee's preceding fiscal year it received:

i. 80 percent or more of the Grantee's annual gross revenues from Federal procurement contracts and federal financial assistance subject to the Transparency Act, as defined at 2 CFR 170.320 (and sub awards); and
ii. $25,000,000 or more in annual gross revenues from federal procurement contracts (and subcontracts), and federal financial assistance subject to the Transparency Act (and sub awards); and
iii. The public does not have access to information about the compensation of the executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. § 78m(a), 78o(d)) or § 6104 of the Internal Revenue Code of 1986. (To determine if the public has access to the compensation information, see the U.S. Security and Exchange Commission total compensation filings at http://www.sec.gov/answers/execomp.htm.).

As defined in 2 C.F.R. § 170.315, "Executive" means officers, managing partners, or any other employees in management positions.

(2) Total compensation means the cash and noncash dollar value earned by the executive during the Grantee's preceding fiscal year and includes the following (for more information see 17 CFR § 229.402(c)(2)):

i. Salary and bonus.
ii. Awards of stock, stock options, and stock appreciation rights. Use the dollar amount recognized for financial statement reporting purposes with respect to the fiscal year in accordance with the Statement of Financial Accounting Standards No. 123 (Revised 2004) (FAS 123R), Shared Based Payments.
iii. Earnings for services under non-equity incentive plans. This does not include group life, health, hospitalization or medical reimbursement plans that do not discriminate in favor of executives, and are available generally to all salaried employees.
iv. Change in pension value. This is the change in present value of defined benefit and actuarial pension plans.
v. Above-market earnings on deferred compensation which is not tax qualified.
vi. Other compensation, if the aggregate value of all such other compensation (e.g. severance, termination payments, value of life insurance paid on behalf of the employee, perquisites or property) for the executive exceeds $10,000.

b. The Grantee must report executive total compensation described above to the State by the end of the month during which this Grant Contract is established.

c. If this Grant Contract is amended to extend its term, the Grantee must submit an executive total compensation report to the State by the end of the month in which the amendment to this Grant Contract becomes effective.

d. The Grantee will obtain a Unique Entity Identifier (SAM) and maintain its number for the term of this Grant Contract. More information about obtaining a Unique Entity Identifier can be found at: https://www.gsa.gov.

The Grantee's failure to comply with the above requirements is a material breach of this Grant Contract for which the State may terminate this Grant Contract for cause. The State will not be obligated to pay any outstanding invoice received from the Grantee unless and until the Grantee is in full compliance with the above requirements.

E.8. Healthy Eating Requirements. Grant recipients who purchase or serve snacks or meals in conjunction with their performance under this Grant Contract shall provide only healthy foods. No high sugar beverage shall be served at any time. Fruits and vegetables shall be given preference in menu selections.

E.9. Assistance Listing Number. When applicable, the Grantee shall inform its licensed independent public accountant of the federal regulations that require compliance with the performance of an audit. This information shall consist of the following Assistance Listing Number: 93.558 Temporary Assistance for Needy Families.

E.10. Information Technology Security Requirements (State Data, Audit, and Other Requirements).

a. The Grantee shall protect State Data as follows:

(1) The Grantee shall ensure that all State Data is housed in the continental United States, inclusive of backup data. All State data must remain in the United States, regardless of whether the data is processed, stored, in-transit, or at rest. Access to State data shall be limited to US-based (onshore) resources only.

All system and application administration must be performed in the continental United States. Configuration or development of software and code is permitted outside of the United States. However, software applications designed, developed, manufactured, or supplied by persons owned or controlled by, or subject to the jurisdiction or direction of, a foreign adversary, which the U.S. Secretary of Commerce acting pursuant to 15 CFR 7 has defined to include the People's Republic of China, among others are prohibited. Any testing of code outside of the United States must use fake data. A copy of production data may not be transmitted or used outside the United States.

(2) The Grantee shall encrypt Confidential State Data at rest and in transit using the current version of Federal Information Processing Standard ("FIPS") 140-2 validated encryption technologies.

(3) The Grantee shall implement and maintain privacy and security controls that follow the guidelines set forth in the most current version of NIST 800-171, "Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations," with the State to review the implementation of this Section. The State must have proof of compliance with NIST 800-171 in the form of a third-party audit at a minimum every two years or upon request.

No additional funding shall be allocated for these examinations as they are included in the Maximum Liability of this Contract.

(4) The Grantee must annually perform Penetration Tests and Vulnerability Assessments against its Processing Environment per the NIST 800-115 definition. "Processing Environment" shall mean the combination of software and hardware on which the Application runs. "Application" shall mean the computer code that supports and accomplishes the State's requirements as set forth in this Contract. "Penetration Tests" shall be in the form of attacks on the Grantee's computer system, with the purpose of discovering security weaknesses which have the potential to gain access to the Processing Environment's features and data. The "Vulnerability Assessment" shall be designed and executed to define, identify, and classify the security holes (vulnerabilities) in the Processing Environment. The Grantee shall provide a letter of attestation on its processing environment that penetration tests and vulnerability assessments have been performed on an annual basis and taken corrective action to

evaluate and address any findings. The Grantee must provide a letter of attestation that includes a penetration testing and vulnerability assessments report per NIST 800-115 that outlines risk exposure of the critical, high, and moderate risks and how they were mitigated, within 30 days of receiving the results.

In the event of an unauthorized disclosure or unauthorized access to State data, the State Strategic Technology Solutions (STS) Security Incident Response Team (SIRT) must be notified and engaged by calling the State Customer Care Center (CCC) at 615-741-1001. Any such event must be reported by the Grantee within twenty-four (24) hours after the unauthorized disclosure has come to the attention of the Grantee.

(5) If a breach has been confirmed a fully un-modified third-party forensics report must be supplied to the State and through the STS SIRT. This report must include indicators of compromise (IOCs) as well as plan of actions for remediation and restoration. Grantee shall take all necessary measures to halt any further Unauthorized Disclosures.

(6) Upon State request, the Grantee shall provide a copy of all Confidential State Data it holds. The Grantee shall provide such data on media and in a format determined by the State

(7) Upon termination of this Contract and in consultation with the State, the Grantee shall destroy, and ensure all subcontractors shall destroy, all Confidential State Data it holds (including any copies such as backups) in accordance with the current version of National Institute of Standards and Technology ("NIST") Special Publication 800-88. The Grantee shall provide a written confirmation of destruction to the State within ten (10) business days after destruction.

b. Minimum Requirements

(1) The Grantee and all data centers used by Grantee to host State data, including those of all subcontractors, must comply with the most current version of NIST 800-171, "Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations," with the State to review the implementation of this Section. The State must have proof of compliance with NIST 800-171 in the form of a third-party audit at a minimum every two years or upon request. Knox County Information Security Management Policy is attached as Attachment #7.

(2) The Grantee agrees to maintain the Application so that it will run on a current, manufacturer-supported Operating System. "Operating System" shall mean the software that supports a computer's basic functions, such as scheduling tasks, executing applications, and controlling peripherals.

(3) If the Application requires middleware or database software, Grantee shall maintain middleware and database software versions that are always fully compatible with current versions of the Operating System and Application to ensure that security vulnerabilities are not introduced.

(4) In the event of drive/media failure, if the drive/media is replaced, it remains with the State and it is the State's responsibility to destroy the drive/media, or the Grantee shall provide written confirmation of the sanitization/destruction of data according to NIST 800-88.

c. Business Continuity Requirements. The Grantee shall maintain set(s) of documents, instructions, and procedures which enable the Grantee to respond to accidents, disasters, emergencies, or threats without any stoppage or hindrance in its key operations ("Business Continuity Requirements"). Business Continuity Requirements shall include:

(1) "Disaster Recovery Capabilities" refer to the actions the Grantee takes to meet the Recovery Point and Recovery Time Objectives defined below. Disaster Recovery Capabilities shall

meet the following objectives:

i. Recovery Point Objective ("RPO"). The RPO is defined as the maximum targeted period in which data might be lost from an IT service due to a major incident: 24 hours

ii. Recovery Time Objective ("RTO"). The RTO is defined as the targeted duration of time and a service level within which a business process must be restored after a disaster (or disruption) in order to avoid unacceptable consequences associated with a break in business continuity: 48 hours

(2) The Grantee and the Subcontractor(s) shall maintain a documented Disaster Recovery plan and shall share this document with the State when requested. The Grantee and the Subcontractor(s) shall perform at least one Disaster Recovery Test every three hundred sixty-five (365) days. A "Disaster Recovery Test" shall mean the process of verifying the success of the restoration procedures that are executed after a critical IT failure or disruption occurs. The Disaster Recovery Test shall use actual State Data Sets that mirror production data, and success shall be defined as the Grantee verifying that the Grantee can meet the State's RPO and RTO requirements. A "Data Set" is defined as a collection of related sets of information that is composed of separate elements but can be manipulated as a unit by a computer. The Grantee shall provide written confirmation to the State after each Disaster Recovery Test that its Disaster Recovery Capabilities meet the RPO and RTO requirements.

E.11. Comptroller Audit Requirements.

When requested by the State or the Comptroller of the Treasury, the Grantee must provide the State or the Comptroller of the Treasury with a detailed written description of the Grantee's information technology control environment, including a description of general controls and application controls. The Grantee must also assist the State or the Comptroller of the Treasury with obtaining a detailed written description of the information technology control environment for any third or fourth parties, or Subcontractors, used by the Grantee to process State data and/or provide services under this Contract.

Grantee will maintain and cause its Subcontractors to maintain a complete audit trail of all transactions and activities in connection with this Contract, including all information technology logging and scanning conducted within the Grantee's and Subcontractor's information technology control environment. Upon reasonable notice and at any reasonable time, the Grantee grants the State or the Comptroller of the Treasury with the right to audit the Grantee's information technology control environment, including general controls and application controls. The audit may include testing the general and application controls within the Grantee's information technology control environment and may also include testing general and application controls for any third or fourth parties, or Subcontractors, used by the Grantee to process State data and/or provide services under this Contract. The audit may include the Grantee's and Subcontractor's compliance with NIST 800-171 and all applicable requirements, laws, regulations, or policies.

Upon reasonable notice and at any reasonable time, the Grantee and Subcontractor(s) agree to allow the State, the Comptroller of the Treasury, or their duly appointed representatives to perform information technology control audits of the Grantee and all Subcontractors used by the Grantee. Grantee will provide to the State, the Comptroller of the Treasury, or their duly appointed representatives access to Grantee and Subcontractor(s) personnel for the purpose of performing the information technology control audit. The audit may include interviews with technical and management personnel, physical or virtual inspection of controls, and review of paper or electronic documentation.

The Grantee must have a process for correcting control deficiencies that were identified in the State's or Comptroller of the Treasury's information technology audit. For any audit issues identified, the Grantee and Subcontractor(s) shall submit a corrective action plan to

the State or the Comptroller of the Treasury which addresses the actions taken, or to be taken, and the anticipated completion date in response to each of the audit issues and related recommendations of the State or the Comptroller of the Treasury. The corrective action plan shall be provided to the State or the Comptroller of the Treasury upon request from the State or Comptroller of the Treasury and within 30 days from the issuance of the audit report or communication of the audit issues and recommendations. Upon request from the State or Comptroller of the Treasury, the Grantee and Subcontractor(s) shall provide documentation and evidence that the audit issues were corrected.

Each party shall bear its own expenses incurred while conducting the information technology controls audit.

E.12. Personally Identifiable Information. While performing its obligations under this Grant Contract, Grantee may have access to Personally Identifiable Information held by the State ("PII"). For the purposes of this Grant Contract, "PII" includes "Nonpublic Personal Information" as that term is defined in Title V of the Gramm-Leach-Bliley Act of 1999 or any successor federal statute, and the rules and regulations thereunder, all as may be amended or supplemented from time to time ("GLBA") and personally identifiable information and other data protected under any other applicable laws, rule or regulation of any jurisdiction relating to disclosure or use of personal information ("Privacy Laws"). Grantee agrees it shall not do or omit to do anything which would cause the State to be in breach of any Privacy Laws. Grantee shall, and shall cause its employees, agents and representatives to: (i) keep PII confidential and may use and disclose PII only as necessary to carry out those specific aspects of the purpose for which the PII was disclosed to Grantee and in accordance with this Grant Contract, GLBA and Privacy Laws; and (ii) implement and maintain appropriate technical and organizational measures regarding information security to: (A) ensure the security and confidentiality of PII; (B) protect against any threats or hazards to the security or integrity of PII; and (C) prevent unauthorized access to or use of PII. Grantee shall immediately notify State: (1) of any disclosure or use of any PII by Grantee or any of its employees, agents and representatives in breach of this Grant Contract; and (2) of any disclosure of any PII to Grantee or its employees, agents and representatives where the purpose of such disclosure is not known to Grantee or its employees, agents and representatives. The State reserves the right to review Grantee's policies and procedures used to maintain the security and confidentiality of PII and Grantee shall, and cause its employees, agents and representatives to, comply with all reasonable requests or directions from the State to enable the State to verify or ensure that Grantee is in full compliance with its obligations under this Grant Contract in relation to PII. Upon termination or expiration of the Grant Contract or at the State's direction at any time in its sole discretion, whichever is earlier, Grantee shall immediately return to the State any and all PII which it has received under this Grant Contract and shall destroy all records of such PII.

The Grantee shall report to the State any instances of unauthorized access to or potential disclosure of PII in the custody or control of Grantee ("Unauthorized Disclosure") that come to the Grantee's attention. Any such report shall be made by the Grantee within twenty-four (24) hours after the Unauthorized Disclosure has come to the attention of the Grantee. Grantee shall take all necessary measures to halt any further Unauthorized Disclosures. The Grantee, at the sole discretion of the State, shall provide no cost credit monitoring services for individuals whose PII was affected by the Unauthorized Disclosure. The Grantee shall bear the cost of notification to all individuals affected by the Unauthorized Disclosure, including individual letters and public notice. The remedies set forth in this Section are not exclusive and are in addition to any claims or remedies available to this State under this Grant Contract or otherwise available at law. The obligations set forth in this Section shall survive the termination of this Grant Contract.

IN WITNESS WHEREOF, the parties have by their duly authorized representatives set their signatures.

THE GOVERNMENT OF KNOX COUNTY dba KNOX COUNTY HEALTH DEPARTMENT

_____ _____
Glenn Jacobs Date
County Mayor

KNOX COUNTY HEALTH DEPARTMENT

_____ _____
Kevin Parton Date
Senior Director

APPROVED AS TO FORM: CONTRACT #

_____ _____
Jessica Jernigan-Johnson Date
Knox County Deputy Law Director

DEPARTMENT OF HEALTH

_____ _____
Dr. John R. Dunn Date
Interim Commissioner

Prepaid store cards –

For the sake of this funding award, these items **(food and water, infant formula, gas cards, and prepaid cards)** will be captured in this category of Prepaid Grocery Cards as these items can be purchased at grocery stores.

Please note: State auditors do not encourage the use of grocery cards, as they do not have an expiration date, so it is impossible to know if they were expended within the designated period of availability. **Due to this, please encourage your families to spend the full amount on the card within the reasonable time allowed and submit supportive receipts to TDH with invoice**.

Gift cards purchased in bulk must be distributed immediately following purchase. It is advised that no more than 20 cards are kept on hand at any given time to deal with emergencies.

The State of Tennessee will only reimburse after the gift card has been distributed to the client and the grantee has adequate documentation.

Any incentives the grantee disburses to participants must be entered in Apricot, the EBHV data management system, and signed by the recipient.

ATTACHMENT 2

Federal Award Identification Worksheet

Subrecipient's name (must match name associated with its Unique Entity Identifier (SAM)	County of Knox
Subrecipient's Unique Entity Identifier (SAM)	HS2EQEN6B6K4
Federal Award Identification Number (FAIN)	2401TNTANF
Federal award date	10-1-23
Subaward Period of Performance Start and End Date	July 1, 2025, to June 30, 2028
Subaward Budget Period Start and End Date	July 1, 2025, to June 30, 2028
Assistance Listing number (formerly known as the CFDA number) and Assistance Listing program title.	93.558 Temporary Assistance for Needy Families
Grant contract's begin date	7/1/2026
Grant contract's end date	6/30/2027
Amount of federal funds obligated by this grant contract	$1,755,213.10
Total amount of federal funds obligated to the subrecipient	
Total amount of the federal award to the pass-through entity (Grantor State Agency)	$190,885,719.67
Federal award project description (as required to be responsive to the Federal Funding Accountability and Transparency Act (FFATA)	Families First 2Gen Based Community Grant
Name of federal awarding agency	Department of Health & Human Services
Name and contact information for the federal awarding official	Mr. John Funk Financial Management Specialist John.funk@acf.hhs.gov 646-905-8070
Name of pass-through entity	Tennessee Department of Human Services
Name and contact information for the pass-through entity awarding official	Keisha Thaxton Keisha.Thaxton@tn.gov
Is the federal award for research and development?	No
Indirect cost rate for the federal award (See 2 C.F.R. §200.332 for information on type of indirect cost rate)	Public Assistance Cost Allocation Plan

ATTACHMENT 3

(BUDGET PAGE 1)

GRANT BUDGET

KNOX COUNTY HEALTH DEPARTMENT

APPLICABLE PERIOD: The grant budget line-item amounts below shall be applicable only to expense incurred during the period beginning July 1, 2026, and ending June 30, 2027.

	EXPENSE OBJECT LINE-ITEM CATEGORY [1]	GRANT CONTRACT	GRANTEE PARTICIPATION	TOTAL PROJECT
	Salaries[2]	$1,097,600.00	$0.00	$1,097,600.00
	Benefits & Taxes	$252,400.00	$0.00	$252,400.00
	Professional Fee/ Grant & Award [2]	$30,000.00	$0.00	$30,000.00
	Supplies	$61,213.10	$0.00	$61,213.10
	Telephone	$30,000.00	$0.00	$30,000.00
	Postage & Shipping	$5,000.00	$0.00	$5,000.00
	Occupancy	$18,500.00	$0.00	$18,500.00
	Equipment Rental & Maintenance	$35,000.00	$0.00	$35,000.00
	Printing & Publications	$500.00	$0.00	$500.00
	Travel/ Conferences & Meetings[2]	$80,000.00	$0.00	$80,000.00
	Interest [2]	$0.00	$0.00	$0.00
	Insurance	$0.00	$0.00	$0.00
	Specific Assistance To Individuals[2]	$10,000.00	$0.00	$10,000.00
	Depreciation [2]	$0.00	$0.00	$0.00
	Other Non-Personnel [2]	$0.00	$0.00	$0.00
	Capital Purchase [2]	$0.00	$0.00	$0.00
	Indirect Cost (10% Salary + Benefits)	$135,000.00	$0.00	$135,000.00
	In-Kind Expense	$0.00	$0.00	$0.00
	GRAND TOTAL	$1,755,213.10	$0.00	$1,755,213.10

[1] Each expense object line-item is defined by the *U.S. OMB's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, Subpart E Cost Principles* (posted on the Internet at: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-E) and CPO Policy 2013-007 (posted online at https://www.tn.gov/generalservices/procurement/central-procurement-office--cpo-/library-.html).

[2] Applicable detail follows this page if line-item is funded.

GRANT BUDGET LINE-ITEM DETAIL:

SALARIES	Monthly Salary		# of Months		% of Effort		Longevity (If applicable)	AMOUNT
Michelle Boles,Office Manager	$3,924.05	x	12	x	100.00%	+		$47,088.61
Susan Snoots, Parent Educator	$4,510.60	x	12	x	100.00%	+		$54,127.20
Nora Housley, Parent Educator	$4,555.72	x	12	x	100.00%	+		$54,668.69
Haley Bilibrey, Parent Educator	$4,693.75	x	12	x	100.00%	+		$56,325.04
Ashely Teaster, Parent Educator	$4,334.59	x	12	x	100.00%	+		$52,015.06
Erica Luna, Parent Educator	$4,693.75	x	12	x	100.00%	+		$56,325.04
Rachel Roberts, Parent Educator	$4,334.59	x	12	x	100.00%	+		$52,015.06
Jenna Spurlock, Parent Educator	$4,334.59	x	12	x	100.00%	+		$52,015.06
Kristin Rodriguez, Parent Educator	$4,510.60	x	12	x	100.00%	+		$54,127.20
Sarah Ortiz Aguilar, Parent Educator	$4,334.59	x	12	x	100.00%	+		$52,015.06
Stephanie Peltier-Green, Parent Educator	$4,510.60	x	12	x	100.00%	+		$54,127.20
Amanda Rueter, Parent Educator	$4,510.60	x	12	x	100.00%	+		$54,127.20
Sirrea Deschenes, Parent Educator	$4,334.59	x	12	x	100.00%	+		$52,015.06
Vacant, Parent Educator	$4,334.59	x	12	x	100.00%	+		$52,015.06
Vacant, Parent Educator	$4,334.59	x	12	x	100.00%	+		$52,015.06
Kathryn Miller, Lead	$5,570.82	x	12	x	100.00%	+		$66,849.84
Sarah Pape, Lead	$5,353.43	x	12	x	100.00%	+		$64,241.20
Sherry Mink, Promotion and outreach	$4,924.78	x	12	x	100.00%	+		$59,097.30
Christel Crawford, Program Manager	$6,252.91	x	12	x	100.00%	+		$75,034.88
Bonni Conley, Admin Assistant	$3,110.36	x	12	x	100.00%	+		$37,324.36
ROUNDED TOTAL								$1,097,600.00

PROFESSIONAL FEE/ GRANT & AWARD	AMOUNT
PAT Affiliate Fee & PAT PE, Lead PE, and Program manager fees	$20,000.00
Translation Services	$10,000.00
ROUNDED TOTAL	**$30,000.00**

TRAVEL/ CONFERENCES & MEETINGS	AMOUNT
Routine mileage	$50,000.00
New PE PAT fees, and fees and travel expenses for the PAT Conference, State Summit, Child Advocacy Days, Professional development, and Employee engagement activities	$30,000.00
ROUNDED TOTAL	**$80,000.00**

SPECIFIC ASSISTANCE TO INDIVIDUALS	AMOUNT
Program enrollment items, group connection items for enrolled families	$10,000.00
ROUNDED TOTAL	**$10,000.00**

TN Department of Health

Invoice Reimbursement Form

Contract #
Supplier Name
Program Name

Section 1: Contract Information (to be completed by TDH Accounts)

PO # (Req.) _____

PO Line # (Req.) _____

Receipt # (Req.) _____

Agency Invoice # _____

Edison Contract # _____

Edison Vendor # _____

Edison Address Line # _____

AP Attachment (check if yes) ☐

Section 2: Invoice Information (to be completed by Contractor/Grantee)

Contract Invoice # _____

Invoice Date _____

Service Start Date _____

Service End Date _____

Contract Start Date _____

Contract End Date _____

Contact Person Name _____

Phone # _____

Remit Payment to:

Business Name _____

Street Address _____ City _____ State _____ ZIP _____

Budget Line Items	(A) Total Contract Budget	(B) Amount Billed YTD	(C) Monthly Expenditures Due
Salaries			
Benefits			
Professional Fee/Grant/Award			
Supplies			
Telephone			
Postage and Shipping			
Occupancy			
Equipment Rental and Maintenance			
Printing and Publications			
Travel/Conferences and Meetings			
Interest			
Insurance			
Specific Assistance to Individuals			
Depreciation			
Other Non-Personnel			
Capital Purchase			
Indirect Costs			
TOTAL	$ 0.00	$ 0.00	$ 0.00

Section 3: Payment Information (to be completed by TDH Program)

Invoice Received Date _____ Invoice Received by (Name) _____

Service Type (Select One): ☐ Medical Services ☐ Non-Medical Services

Speedchart	Department ID	User Code	Project ID	Amount ($)

Total Amount: $ 0.00

Additional Signatures as Required by Program (Not required for processing and payment by F&A Accounts Payable)

_____ Program Signature 1

_____ Program Signature 2

_____ Program Signature 3

Section 4: Authorized Signatures

Contractor/Grantee Authorization

Name: _____

Date: _____

Signature: _____

TDH Program Authorization

Name: _____

Date: _____

Signature: _____

TDH Accounts Authorization

Name: _____

Date: _____

Signature: _____

Section 5: Additional Comments

Section 6: Month to Month Expense Tracking Sheet (Not Required by F&A Accounts Payable)

Budget Line Items	Budget Amt	Jul Expenses	Aug Expenses	Sep Expenses	Oct Expenses	Nov Expenses	Dec Expenses	Jan Expenses	Feb Expenses	Mar Expenses	Apr Expenses	May Expenses	Jun Expenses	YTD Totals	Balance Remaining
Salaries	$ 0.00													$ 0.00	$ 0.00
Benefits	$ 0.00													$ 0.00	$ 0.00
Fee/Grant/Award	$ 0.00													$ 0.00	$ 0.00
Supplies	$ 0.00													$ 0.00	$ 0.00
Telephone	$ 0.00													$ 0.00	$ 0.00
Postage and Shipping	$ 0.00													$ 0.00	$ 0.00
Occupancy	$ 0.00													$ 0.00	$ 0.00
Equipment Rental and Maintenance	$ 0.00													$ 0.00	$ 0.00
Printing and Publications	$ 0.00													$ 0.00	$ 0.00
Travel/Conferences and Meetings	$ 0.00													$ 0.00	$ 0.00
Interest	$ 0.00													$ 0.00	$ 0.00
Insurance	$ 0.00													$ 0.00	$ 0.00
Specific Assistance to Individuals	$ 0.00													$ 0.00	$ 0.00
Depreciation	$ 0.00													$ 0.00	$ 0.00
Other Non-Personnel	$ 0.00													$ 0.00	$ 0.00
Capital Purchase	$ 0.00													$ 0.00	$ 0.00
Indirect Costs	$ 0.00													$ 0.00	$ 0.00
Totals	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

REPORTING TEMPLATE

Introduction

Reporting Template has three parts:
•Schedule A,
•Schedule B, and
•Schedule C which are Program Expense Reports (PER), Program Revenue Reports (PRR) and Reconciliation Between Total and Reimbursable Expenses and Total Expense Summary Report.
Program Expense Reports (PER), Program Revenue Reports (PRR) and Reconciliation Between Total and Reimbursable Expenses and Total Expense Summary Report including Schedule A-1 and Schedule B-1 must be submitted in the same format/the same column heading each quarter. The final Report (definition can be found in grant contract agreement) must be approved by the contracting state agency.

Schedule Headings

At the top of each schedule, the name of the reporting contractor/grantee and the period covered by the report need to be entered. The period of the report should always be the most recent quarter ended and report programs in the same sequence as the previous quarter.

Column Headings

For each program for Schedule A and B, Contracting State Agency, Program Name, Assistance Listing Number/Program Number, Edison Contract Number, and Grant/Contract Term should be entered. These can be found in the grant contract agreement.
•The Contracting State Agency is for the state agency who awards the grant and initiates the contract agreement.
•The Program Name is the title to describe the program or the title that corresponds to the Federal Assistance Listing number.
•The Assistance Listing Number/Program Name is a number assigned to identify the Federal Assistance Listings under which the subaward was made by the contracting State agency.
•The Edison contract number is the number assigned by the contracting state agency and should include the amendment number, if any. This can be found in the grant contract agreement.
•The grant/contract term is the beginning and ending dates of the grant/contract. This can be found in the grant contract agreement.

Program Columns

Program expense columns (Quarter-To-Date and Year-To-Date) are for reporting direct program expenses. Direct program expenses that benefit more than one program (i.e., allocable-direct costs) may be allocated to the benefitted programs within the expense categories. The cognizant state agency should approve the method used for cost allocations and the contacting state agency should abide by the cost allocation approved by the cognizant state agency.
The Quarter-To-Date column can be used to capture all expenses for the specific quarter. For example, the expenses for the 2nd quarter (from 10/1/22 to 12/31/2022) can be entered in this column.
All accumulated expenses for each program can be entered in Year-To-Date column. For example, if a grantee/organization has entered the expenses for the 2nd quarter in Quarter-To-Date column, all accumulated expenses for the 1st quarter and the 2nd quarter should be entered in Year-To-Date column.

Do not send a worksheet that is linked to another file

E-mail completed files to: policy2013_007.amo.health@tn.gov

or Mailing Address:

Rushdi Eskarous
Tennessee Department of Health
Fiscal Services
6th Floor Andrew Johnson Tower
710 James Robertson Parkway
Nashville, TN 37243

Telephone: 615-741-2974

QUESTIONS:

Angela Sumner: angela.sumner@tn.gov
Rushdi Eskarous: rushdi.eskarous@tn.gov

PROGRAM EXPENSE REPORT (PER) SCHEDULE A

Purpose/Scope

The Program Expense Report (PER Schedule A) contains expenses by the detailed line items and then summarizes by subtotals or total**.** This schedule can be used for any grants received from a state agency or multiple state agencies.

These expenses include direct and allocated direct program expenses in each line item. Per 2 CFR Part 200.413, direct costs are those costs that can be identified specifically with a particular final cost objective, such as a grant, or other internally or externally funded activity, or that can be directly assigned to such activities relatively easily with a high degree of accuracy. Per 2 CFR Part 200.405, allocable direct costs are those that benefit more than one program, but do not fall under the criteria of indirect costs.

Except for depreciation, every expense reported in Lines 1 through 21 must represent an actual cash disbursement or accrual (as defined in the Basis for Reporting Expenses/Expenditures section on page 1 of this instructions). If more than two programs (e.g., four programs), complete multiple Schedule As to report all four program expenses.

Instruction for Expenses by Object Line-Items

Line 1 Salaries and Wages

Enter the amount of compensation, fees, salaries, bonuses, severance payments, and wages paid to program directors, program managers/staffs, and employees.

References:

2 CFR Part 200.430
Form 990 Part IX line 5, 7

Line 2 Employee Benefits & Payroll Taxes

Enter (a) the grantee's/organization's contributions to pension plans and to employee benefit programs such as health, life, and disability insurance; and (b) the grantee's/organization's portion of payroll taxes such as social security, Medicare taxes, and unemployment and workers' compensation insurance.

References:

2 CFR Part 200.431
Form 990 Part IX lines 8, 9, 10

Line 3 Total Personnel Expenses

Add lines 1 Salaries and Wages and 2 Employee Benefits & Payroll Taxes.

Line 4 Professional Fees

Enter the costs/fees of professionals, consultants, and personal-service contractors who are not officers or employees of the grantee/organization. These include legal, accounting, and auditing fees.

References:

2 CFR Part 200.459
Form 990 Part IX line 11

Line 5 Supplies

Enter the grantee's/organization's expenses for office supplies, housekeeping supplies, and other supplies.

References:
2 CFR Part 200.453
Form 990 Part IX line 13

Line 6 Telecommunication

Enter the grantee's/organization's expenses for telephone, cellular phones, beepers, telegram, FAX, telephone equipment maintenance, internet, cloud servers, and other related expenses.

References:
2 CFR Part 200.471
Form 990 Part IX line 13

Line 7 Postage and Shipping

Enter the grantee's/organization's expenses for postage, messenger services, overnight delivery, outside mailing service fees, freight and trucking, and maintenance of delivery and shipping vehicles. Include vehicle insurance here or on line 14.

References:
2 CFR Part 200.474
Form 990 Part IX line 13

Line 8 Occupancy

Enter the grantee's/organization's expenses for use of office space and other facilities including rent, heat, light, power, other utilities, outside janitorial services, mortgage interest, real estate taxes, and similar expenses. Include property insurance here or on line 14.

References:
2 CFR Part 200.465
Form 990 Part IX line 16

Line 9 Equipment Rental and Maintenance

Enter the grantee's/organization's expenses for renting and maintaining computers, copiers, postage meters, other office equipment, and other equipment, except for telecommunications, truck, and automobile expenses, reportable on lines 6, 7, and 11, respectively.

References:
2 CFR Part 200.452
Form 990 Part IX line 13

Line 10 Printing and Publications

Enter the grantee's/organization's expenses for producing printed materials, purchasing books and publications, buying subscriptions to publications, publication costs for electronic and print media, and page charges for professional journal publications.

References:
- 2 CFR Part 200.461
- Form 990 Part IX line 13

Line 11 Travel

Enter the grantee's/organization's expenses for airfare, transportation, meals and lodging, subsistence, and related items incurred by employees on official business of the organization. These costs may be charged on an actual cost basis, on a per diem or mileage basis in lieu of actual costs incurred, consistent with those normally allowed in like circumstances in the organization's non-federal/state-funded activities and in accordance with organization's written travel reimbursement policies. Include gas and oil, repairs, licenses and permits, and leasing costs for company vehicles. Include travel expenses for meetings and conferences. Include vehicle insurance here or on line 14.

If an organization does not have the written travel reimbursement policies, they may use the State Travel policy which is:

F&A Policy 08 Comprehensive State Travel Regulations.

References:
- 2 CFR Part 200.475
- Form 990 Part IX line 17

Line 12 Conference and Meetings

Enter the grantee's/organization's expenses for conducting or attending meetings, conferences, seminars, retreats, and conventions including registration fees. When host of conference, include rental of facilities, speakers' fees and expenses, costs of meals and refreshment (food and beverages), and printed materials for the conference.

References:
- 2 CFR Part 200.432
- Form 990 Part IX line 19

Line 13 Interest

Enter the interest expense for the business related loans and interest costs that are related to capital leases on equipment, trucks and automobiles, and other notes and loans. Do not include mortgage interest reportable on line 8.

References:
- 2 CFR Part 200.449
- Form 990 Part IX line 20

Line 14 Insurance

Enter the grantee's/organization's expenses for liability insurance, fidelity bonds, and other insurance. Do not include employee-related insurance reportable on line 2. Do not include shipping vehicle, property, and organization vehicles for travel if reported on lines 7, 8, or 11 respectively.

References:
2 CFR Part 200.447
Form 990 Part IX line 23

Line 15 Grants and Awards

Enter the grantee's/organization's awards, grants, subsidies, and other pass-through expenditures to other organizations. Include allocations to affiliated organizations. Include in- kind grants to other organizations. Include scholarships, tuition payments, travel allowances, and equipment allowances to clients. These expenses will not include when calculating Administrative Expense in line 22.

References:
2 CFR Part 200.1
Form 990 Part IX line 1

Line 16 Specific Assistance to Individuals

Enter the grantee's/organization's direct payment for expenses of clients, patients, and individual beneficiaries. Include such expenses as medicines, medical and dental fees, children's board, food and homemaker services, clothing, transportation, insurance coverage, scholarships, fellowships, stipends, research grants, wage supplements, and similar payments.

References:
2 CFR Part 200.456
Form 990 Part IX line 2

Line 17 Depreciation

Enter the expenses the grantee's/organization's records for depreciation (the method for allocating the cost of fixed assets to periods benefitting from asset use) of equipment, buildings, leasehold improvements, and other depreciable fixed assets.

References:
2 CFR Part 200.436
Form 990 Part IX line 22

Line 18 Other Nonpersonnel Expenses

Enter the grantee's/organization's allowable expenses for Advertising, Information Technology, Bad Debts, Contingency Provisions, Fines and Penalties, Independent Research and Development, Organization Costs, Rearrangement and Alteration, Recruiting, and Taxes. Include the Organization's and Employees' Membership Dues in Associations and Professional Societies. Include other fees for the Organization's Licenses, Permits, and Registrations, etc.

NOTE: Expenses reportable on lines 1 through 17 should not be reported as an additional expense category on line 18. A description should be attached for each additional category entered on line 18. The contracting state agency may determine these requirements in the grant contract agreement.

a) Advertising:

Enter expenses paid for advertising. Include amounts for print and electronic media advertising. Also include internet site link costs, signage costs, and advertising costs for the organization's in-house fundraising campaigns.

References:
2 CFR Part 200.421
Form 990 Part IX line 12

b) Information Technology:

Enter expenses for information technology, including hardware, software, and support services such as maintenance, help desk, and other technical support services. Also include expenses for infrastructure support, such as website design and operations, virus protection and other information security programs and services to keep the organization's website operational and secured against unauthorized and unwarranted intrusions, and other information technology contractor services.

References:
2 CFR Part 200.1
Form 990 Part IX line 14

c) Bad Debts:

Enter expense amounts for losses (whether actual or estimated) arising from uncollectable accounts and other claims, related collection costs, and related legal costs.

References:
2 CFR Part 200.426
Form 990 Part IX line 24

d) Contingency Provisions:

Enter expense amounts for contributions to a contingency reserve or any similar provision made for events the occurrence of which cannot be foretold with certainty as to time, intensity, or with an assurance of their happening.

References:
2 CFR Part 200.433
Form 990 Part IX line 24

e) Fines and Penalties:

Enter costs of fines and penalties resulting from violations of, or failure of the organization to comply with Federal, State, and local laws and regulations except when incurred as a result of compliance with specific provisions of an award or instructions in writing from the awarding agency.

References:
2 CFR Part 200.441
Form 990 Part IX line 24

f) Independent Research and Development:

Enter the expenses of all research activities, including the training of individuals in research techniques.

References:
2 CFR Part 200.1
Form 990 Part IX line 24

g) Organization Costs:

Enter expenses such as incorporation fees, brokers' fees, fees to promoters, and organizers.

References:
2 CFR Part 200.455
Form 990 Part IX line 24

h) Rearrangement and Alteration:

Enter expenses incurred for ordinary or normal rearrangement and alteration of facilities. Include the expenses incurred in the restoration or rehabilitation of the organization's facilities.

References:
2 CFR Part 200.462
Form 990 Part IX line 24

i) Recruiting:

Enter expenses for recruiting staff and maintaining workload requirements, costs of "help wanted" advertising, operating costs of an employment office necessary to secure and maintain an adequate staff, costs of operating an aptitude and educational testing program and relocation costs incurred incident to recruitment of new employees.

References:
2 CFR Part 200.463
Form 990 Part IX line 24

j) Taxes:

Enter expenses for payment of taxes to the local government or state.

References:
2 CFR Part 200.470
Form 990 Part IX line 24

k) Organization's and Employee's Membership Dues in Associations and Professional Societies:

Enter expenses of the organization's membership or subscriptions in business, technical, and professional organizations.

References:
2 CFR Part 200.454
Form 990 Part IX line 24

Line 19 Total Nonpersonnel Expenses

Add lines 4 Professional Fees through 18 Other Non-personnel Expenses.

Line 20 Reimbursable Capital Purchases

Enter the organization's purchases of fixed assets. Include land, equipment, buildings, leasehold improvements, and other fixed assets.

References:

2 CFR Part 200.439

Form 990 Par X line 10a or Schedule D Part VI

Line 21 Total Direct Program Expenses

Add Line 3 Total Personnel Expenses, and Line 19 Total Non-personnel Expenses, and Line 20 Reimbursable Capital Purchases. These expenses are the summary of the direct and allocated direct program expenses that entered in Line 1 Salaries and Wages through Line 20 Reimbursable Capital Purchases.

Reference:

2 CFR Part 200.405 2 CFR Part 200.413

Form 990 Part IX, column B

Line 22 Administrative Expenses

The distribution will be made in accordance with an allocation plan approved by your cognizant state agency. Pass-through funds (Line 15 Grants and Awards) are not included when computing administrative expenses.

References:

2 CFR Part 200.414

Form 990 Part IX, Column C

Line 23 Total Direct Program and Administrative Expenses

Line 23 is the total of Line 21 Total Direct Program Expenses and Line 22 Administrative Expenses. Total Direct Program and Administrative Expenses (Line 23) Year To Date (if quarter end 3/31/2023) should agree with Total of YTD (Year To Date) Actual Expenditures Through 3/31/2023 (Column E) of the Invoice for Reimbursement.

Line 24 In-Kind Expenses

In-kind Expenses is for reporting the value of contributed resources (non-cash) applied to the program. Approval and reporting guidelines for in-kind contributions will be specified by those contracting state agencies who allow their use toward earning grant funds.

References:

2 CFR Part 200.434

Form 990 Part XI line 6

Line 25 Total Program Expenses

The sum of Line 23 Total Direct Program and Administrative Expenses and Line 24 In-kind Expenses goes on this line.

PROGRAM EXPENSE REPORT (PER) SCHEDULE A-Q1-Q4

Purpose/Scope

This template tracks expenses for all the quarters and summarizes in the Year-To-Date column. The Year-To-Date column can be linked to Year-To-Date column of the Schedule A.

Additionally, this schedule provides the Grant Budget Amount (from grant contract agreement) column and the Over/(Under) Budget Amount column which compares cumulative Year-To-Date expenses to Grant Budget Amount.

Instruction for Expenses by Object Line-Items

The instructions for expense line items are the same as Schedule A.

PROGRAM REVENUE REPORT AND RECONCILIATION BETWEEN TOTAL PROGRAM AND REIMBURSABLE EXPENSES SCHEDULE B

Purpose/Scope

Program Revenue Report (PRR) and Reconciliation Between Total and Reimbursable Expenses, Schedule B, are intended to capture all revenue by the detailed source and reconcile total program expenses and reimbursable expenses. Each revenue column should match up with the Edison Contract Number and the Program Name from Schedule A and align with its corresponding expense column from the Schedule A. The Reconciliation of Total Program Expenses And Reimbursable Expenses, at the bottom of Schedule B, should be completed to show how Total Program Expenses (Line 51 of Schedule B or Line 25 of Schedule A) reconciles to the amount to be reimbursed.

If multiple programs exist, additional copies of the Schedule B can be used to enter all Program Revenue and Reconciliation Between Total and Reimbursable Expenses.

Additional supplemental schedules showing the Sources of Revenue in the aggregations may be attached, if needed. The contracting state agency may provide more guidance in the grant contract agreement.

Instruction for Sources of Revenue

• Reimbursable Program Funds

Line 31 Reimbursable Federal Program Funds

Enter the portion of Total Direct Program & Administrative Expenses reported on Line 23 of the Schedule A that are reimbursable from the Federal program funds.

Reference:
Form 990 Part VIII 1e

Line 32 Reimbursable State Program Funds

Enter the portion of Total Direct Program & Administrative Expenses reported on Line 23 of the Schedule A that are reimbursable from the state program funds.

Reference:
Form 990 Part VIII 1e

Line 33 Total Reimbursable Program Funds

Add Line 31 Reimbursable Federal Program Funds and Line 32 Reimbursable State Program Funds.

• Matching Revenue Funds

Note: matching requirements can be found in the grants contact agreement for the grants received from the contracting state agency.

Line 34 Other Federal Funds

Enter the matching portion (the grantee portion) of the program costs that will be covered by other Federal fund sources.

Reference:
Form 990 Part VIII 1e

Line 35 Other State Funds

Enter the matching portion (the grantee portion) of the program costs that will be covered by other State fund source.

Reference:
Form 990 Part VIII 1e

Line 36 Other Government Funds

Enter the matching portion (the grantee portion) of the program costs that will be covered by other government fund source.

Reference:
Form 990 Part VIII 1e

Line 37 Cash Contributions (Nongovernment)

Enter the matching portion (the grantee portion) of the cash contributions that were received from corporations, foundations, trusts, and individuals, United Ways, other not-for-profit organizations, and affiliated organizations. This is only applicable when the grantee has received contributions from above donors for this program and this is included as expense line-items of the Schedule A.

References:
Form 990 Part VIII 1f

Line 38 In-Kind Contributions (Equals Schedule A. Line 24)

Enter the matching portion (the grantee portion) of the direct and administrative in-kind contributions.

Approval and guidelines for valuation and reporting of in-kind contributions will be specified by those grantor agencies who allow their use toward program purposes.

References:
Form 990 Part VIII line 1f and Part XI line 6

Line 39 Program Income

Enter the matching portion (the grantee portion) of program income. For example, income from fees for services performed.

Reference:
Form 990 Part VIII line 2a to 2f

Line 40 Other Matching Revenue

Enter the matching portion of other revenues that are not included in lines 34 through 39.
References:
Form 990 Part VIII 3 through 11e

Line 41 Total Matching Revenue Funds

Add lines 34 through 40.

Line 42 Other Program Funds

Enter any other program revenues that are funded by the contracting state agency but are not reported as matching revenue funds on Line 41 Total Matching Revenue Funds. Example of this can be in-kind expenses (Line 24 of Schedule A), if any.

References:
Form 990 Part VIII 1a through 11e

Line 43 Total Revenue

Add lines 33, 41, and 42.
References:
Form 990 Part VIII 12

Instruction for Reconciliation Between Total and Reimbursable Expenses

Line 51 Total Program Expenses

This line is brought forward from Line 25 Total Program Expenses on Schedule A.

Line 52 Other Unallowable Expenses

Enter amount for Other Unallowable Expenses here. Some program expenses may not be reimbursable under certain grants. Example of this can be the in-kind expenses which is non-cash item. This will vary according to the contracting state agency and the type of grant or contract. Consult with the contracting state agency that funds the program for additional guidelines.

Line 53 Excess Administration

This line may be used to deduct allocated Administration and General expenses (indirect costs) in excess of the allowable percentage specified in the grant contract agreement or the indirect cost rate that is approved by the cognizant State agency. This line may also be used to deduct an adjustment resulting from limitations on certain components of Administration and General expenses. Consult with the contracting state agency that funds the program for additional guidelines.

Line 54 Matching Expenses

Total program expenses should be deducted from matching (cost sharing) expenses required by the program compliance. This portion can be a specified as an amount or percentage to match the federal award. Program income (e.g., user fees or rental of real property) can be deducted from matching portion.

Line 55 Reimbursable Expense (Line 51 Less Lines 52, 53, And 54)

This should equal the amount the contracting state agency has already paid for the quarter's operations of the program. The cumulative Year-To-Date column is what the grantor has actually paid to date if the organization has submitted the invoice and reimbursed monthly.

Line 56 Total Reimbursement To Date

The Quarter-to-Date column is the total amounts received for this quarter from filing of Invoices for Reimbursement (usually monthly). The cumulative Year-to-Date column amount is the total amount received for the grant program.

Line 57 Difference (Line 55 minus Line 56)

This is the portion of Reimbursable Expenses that are not paid yet. If a grantee submits a monthly invoice for reimbursement and reimbursement has been received, this will be zero.

Line 58 Advances

Any advance payments from the contracting state agency should appear on this line. Most of time, the contracting state agency will not pay the expenses in advance.

Line 59 This Reimbursement (Line 57 minus 58)

The remainder should be the amount due under the grant contract. Request for reimbursement is made through the invoicing process and not through filing of the quarterly or annual report. Any amounts showing here needed to be included in the invoice for reimbursement.

NONGRANT EXPENSE REPORT (NER)
NONGRANT REVENUE REPORT (NRR) AND
RECONCILIATION BETWEEN TOTAL NONGRANT AND REIMBURSABLE EXPENSES
SCHEDULE A-1, SCHEDULE A-1-Q1-Q4, and SCHEDULE B-1

Purpose/Scope

These schedules may be used for the nongrants/unallowable expenses that are not reimbursed/will not be reimbursed by the contracting state agencies.

These schedules should be completed to reconcile expenses per the Total Expense Summary Report (Schedule C) to the trial balance/general ledger when the nongrants/unallowable expenses exist in the grantee's books.

Instruction for Schedules A-1, A-1-Q1-Q4, and B-1

The instruction for these schedules A-1, A-1-Q1-Q4, and B-1 are the same as the instructions for Schedule A and B except these expenses will not be reimbursed by the contracting state agency.

Heading sections may be entered as N/A if this heading is not applicable for Nongrant/Unallowable Expense or Revenue.

TOTAL EXPENSE SUMMARY REPORT
Schedule C

Purpose/Scope

The Total Expense Summary Report is intended to recap all the direct program expenses in one column, separately identify nongrant/unallowable expenses, and total administrative expenses in other columns, as well as a grand total of all the expenses of the grantee. The amounts in Grand Total Year-to-Date column should tie to the general ledger/trial balance of the grantee/organization.

Schedule C should be only one schedule regardless if there are multiple Schedule As and Bs. The grantee will complete all the schedules at one time and will submit the same schedule to the multiple contracting state agencies if the grantee has received awards from the multiple state agencies.

Instruction for Expenses by Object Line-Items

The object line-items are the same as Schedule A. See each line-item instruction in Schedule A.

Instruction for Columns

Total Direct Program Expenses Column

This column is the summary of all the individual programs' cumulative year to date expenses as identified separately under the respective program names in Schedule A.

Total Nongrant/Unallowable Expenses Column

The nongrant/unallowable expense column includes the following expenses:

I. The cumulative year-to-date expenses for all other programs that are not funded by the contracting state agency/agencies.

II. The cumulative year-to-date expenses for fund-raising activities, if any.

III. Other cumulative year-to-date expenses that are not allowable for reimbursement according to the terms of the grants or the Federal guidance.

Total Administrative Expenses Column

The administrative expenses column is for categorizing the cumulative year-to-date administrative expenses into the Expense by Object. Total Direct Program Expenses (line 21) of this column is the sum of all the line 21s. Line 22 of this column will make line 21 amount to be a credit amount so that Total Direct and Administrative Expenses is showing zero since these expenses are already claimed in columns Total Direct Program Expenses Year-To-Date and Total Nongrant/Unallowable Expenses Year-To-Date.

Grand Total Column

The Grand Total column contains all the cumulative year-to-date expenses for the entire reporting organization. The Grant Total Year-to-Date expenses must be traceable to the reporting organization's general ledger or trial balance.

STATE OF TENNESSEE
PROGRAM EXPENSE REPORT

Schedule A | **Page # of # Pages:** | **Report Period:**

Contractor/Grantee Name:

Contracting State Agency:		
Program Name:	A	B
Assistance Listing Number/Program Number:		
Edison Contract Number:		
Grant/Contract Term:		

Line Item #	Expense By Object	Quarter To Date	Year To Date	Quarter To Date	Year To Date
1	Salaries and Wages		0.00		0.00
2	Employee Benefits & Payroll Taxes		0.00		0.00
3	**Total Personnel Expenses**	0.00	0.00	0.00	0.00
4	Professional Fees		0.00		0.00
5	Supplies		0.00		0.00
6	Telecommunication		0.00		0.00
7	Postage and Shipping		0.00		0.00
8	Occupancy		0.00		0.00
9	Equipment Rental and Maintenance		0.00		0.00
10	Printing and Publications		0.00		0.00
11	Travel		0.00		0.00
12	Conferences and Meetings		0.00		0.00
13	Interest		0.00		0.00
14	Insurance		0.00		0.00
15	Grants and Awards		0.00		0.00
16	Specific Assistance to Individuals		0.00		0.00
17	Depreciation		0.00		0.00
18	Other Non-personnel Expenses: (list details in a-d)				
	a		0.00		0.00
	b		0.00		0.00
	c		0.00		0.00
	d		0.00		0.00
19	**Total Non-personnel Expenses**	0.00	0.00	0.00	0.00
20	Reimbursable Capital Purchases		0.00		0.00
21	**Total Direct Program Expenses**	0.00	0.00	0.00	0.00
22	Administrative Expenses		0.00		0.00
23	**Total Direct and Administrative Expenses**	0.00	0.00	0.00	0.00
24	In-Kind Expenses		0.00		0.00
25	**Total Program Expenses**	0.00	0.00	0.00	0.00

STATE OF TENNESSEE
PROGRAM EXPENSE REPORT

Schedule A-Q1-Q4 | **Page # of # Pages:** | |

Contractor/Grantee Name: | **Report Period:** | |

Contracting State Agency:
Program Name: A
Assistance Listing Number/Program Number:
Edison Contract Number:
Grant/Contract Term:

Line Item #	Expense By Object	1 Quarter	2 Quarter	3 Quarter	4 Quarter	Year To Date	Grant Budget Amount (From Contract Agreement)	Over/(Under) Budget Amount
1	Salaries and Wages					0.00		0.00
2	Employee Benefits & Payroll Taxes					0.00		0.00
3	**Total Personnel Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4	Professional Fees					0.00		0.00
5	Supplies					0.00		0.00
6	Telecommunication					0.00		0.00
7	Postage and Shipping					0.00		0.00
8	Occupancy					0.00		0.00
9	Equipment Rental and Maintenance					0.00		0.00
10	Printing and Publications					0.00		0.00
11	Travel					0.00		0.00
12	Conferences and Meetings					0.00		0.00
13	Interest					0.00		0.00
14	Insurance					0.00		0.00
15	Grants and Awards					0.00		0.00
16	Specific Assistance to Individuals					0.00		0.00
17	Depreciation					0.00		0.00
18	Other Non-personnel Expenses: (list details in a-d)							0
	a					0.00		0.00
	b					0.00		0.00
	c					0.00		0.00
	d					0.00		0.00
19	**Total Non-personnel Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
20	Reimbursable Capital Purchases					0.00		0.00
21	**Total Direct Program Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
22	Administrative Expenses					0.00		0.00
23	**Total Direct and Administrative Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
24	In-Kind Expenses					0.00		0.00
25	**Total Program Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00

STATE OF TENNESSEE
NONGRANT/UNALLOWABLE EXPENSE REPORT

Schedule A-1 **Page # of # Pages:**

Contractor/Grantee Name: **Report Period:**

Contracting State Agency:		
Program Name:	A	B
Assistance Listing Number/Program Number:		
Edison Contract Number:		
Grant/Contract Term:		

Line Item #	Expense By Object	Quarter To Date	Year To Date	Quarter To Date	Year To Date
1	Salaries and Wages		0.00		0.00
2	Employee Benefits & Payroll Taxes		0.00		0.00
3	**Total Personnel Expenses**	0.00	0.00	0.00	0.00
4	Professional Fees		0.00		0.00
5	Supplies		0.00		0.00
6	Telecommunication		0.00		0.00
7	Postage and Shipping		0.00		0.00
8	Occupancy		0.00		0.00
9	Equipment Rental and Maintenance		0.00		0.00
10	Printing and Publications		0.00		0.00
11	Travel		0.00		0.00
12	Conferences and Meetings		0.00		0.00
13	Interest		0.00		0.00
14	Insurance		0.00		0.00
15	Grants and Awards		0.00		0.00
16	Specific Assistance to Individuals		0.00		0.00
17	Depreciation		0.00		0.00
18	Other Non-personnel Expenses: (list details in a-d)				
a			0.00		0.00
b			0.00		0.00
c			0.00		0.00
d			0.00		0.00
19	**Total Non-personnel Expenses**	0.00	0.00	0.00	0.00
20	Reimbursable Capital Purchases		0.00		0.00
21	**Total Direct Nongrant Expenses**	0.00	0.00	0.00	0.00
22	Administrative Expenses		0.00		0.00
23	**Total Direct Nongrant and Administrative Expenses**	0.00	0.00	0.00	0.00
24	In-Kind Expenses		0.00		0.00
25	**Total Nongrant Expenses**	0.00	0.00	0.00	0.00

STATE OF TENNESSEE
NONGRANT/UNALLOWABLE EXPENSE REPORT

Schedule A-1-Q1-Q4 **Page # of # Pages:**

Contractor/Grantee Name: **Report Period:**

Contracting State Agency:
Program Name: A
Assistance Listing Number/Program Number:
Edison Contract Number:
Grant/Contract Term:

Line Item #	Expense By Object	1 Quarter	2 Quarter	3 Quarter	4 Quarter	Year To Date	Grant Budget Amount (From Contract Agreement)	Over/(Under) Budget Amount
1	Salaries and Wages					0.00		0.00
2	Employee Benefits & Payroll Taxes					0.00		0.00
3	**Total Personnel Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4	Professional Fees					0.00		0.00
5	Supplies					0.00		0.00
6	Telecommunication					0.00		0.00
7	Postage and Shipping					0.00		0.00
8	Occupancy					0.00		0.00
9	Equipment Rental and Maintenance					0.00		0.00
10	Printing and Publications					0.00		0.00
11	Travel					0.00		0.00
12	Conferences and Meetings					0.00		0.00
13	Interest					0.00		0.00
14	Insurance					0.00		0.00
15	Grants and Awards					0.00		0.00
16	Specific Assistance to Individuals					0.00		0.00
17	Depreciation					0.00		0.00
18	Other Non-personnel Expenses: (list details in a-d)							0.00
	a					0.00		0.00
	b					0.00		0.00
	c					0.00		0.00
	d					0.00		0.00
19	**Total Non-personnel Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
20	Reimbursable Capital Purchases					0.00		0.00
21	**Total Direct Nongrant Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
22	Administrative Expenses					0.00		0.00
23	**Total Direct Nongrant and Administrative Exp**	0.00	0.00	0.00	0.00	0.00	0.00	0.00
24	In-Kind Expenses					0.00		0.00
25	**Total Nongrant Expenses**	0.00	0.00	0.00	0.00	0.00	0.00	0.00

STATE OF TENNESSEE
PROGRAM REVENUE REPORT AND
RECONCILIATION BETWEEN TOTAL PROGRAM AND REIMBURSABLE EXPENSES

Schedule B **Page # of # Pages:**

Contractor/Grantee Name: **Report Period:**

Contracting State Agency:		
Program Name:	A	B
Assistance Listing Number/Program Number:		
Edison Contract Number:		
Grant/Contract Term:		

Line Item #	Sources Of Revenue	Quarter To Date	Year To Date	Quarter To Date	Year To Date
	Reimbursable Program Funds:				
31	Reimbursable Federal Program Funds (Line 23)				
32	Reimbursable State Program Funds (Line 23)				
33	**Total Reimbursable Program Funds (equals line 55)**	0.00	0.00	0.00	0.00
	Matching Revenue Funds:				
34	Other Federal Funds				
35	Other State Funds				
36	Other Government Funds				
37	Cash Contributions (non-government)				
38	In-Kind Contributions (equals line 24)	0.00	0.00	0.00	0.00
39	Program Income				
40	Other Matching Revenue				
41	**Total Matching Revenue Funds (lines 34 - 40)**	0.00	0.00	0.00	0.00
42	Other Program Funds				
43	**Total Revenue (lines 33, 41, & 42)**	0.00	0.00	0.00	0.00
	Reconciliation Between Total and Reimbursable Expenses				
51	Total Program Expenses (line 25)	0.00	0.00	0.00	0.00
52	Subtract Other Unallowable Expenses (contractual)				
53	Subtract Excess Administration Expenses (contractual)				
54	Subtract Matching Expenses (equals line 41)	0.00	0.00	0.00	0.00
55	Reimbursable Expenses (line 51 minus lines 52,53,54)	0.00	0.00	0.00	0.00
56	Total Reimbursement To Date				
57	Difference (line 55 minus line 56)	0.00	0.00	0.00	0.00
58	Advances				
59	This reimbursement (line 57 minus line 58)	0.00	0.00	0.00	0.00

STATE OF TENNESSEE
NONGRANT/UNALLOWABLE REVENUE REPORT AND
RECONCILIATION BETWEEN TOTAL AND REIMBURSABLE EXPENSES

Schedule B-1 **Page # of # Pages:**

Contractor/Grantee Name: **Report Period:**

Contracting State Agency:		
Program Name:	A	B
Assistance Listing Number/Program Number:		
Edison Contract Number:		
Grant/Contract Term:		

Line Item #	Sources Of Revenue	Quarter To Date	Year To Date	Quarter To Date	Year To Date
	Reimbursable Nongrant Funds:				
31	Reimbursable Federal Program Funds (Line 23)				
32	Reimbursable State Program Funds (Line 23)				
33	**Total Reimbursable Nongrant Funds (equals line 55)**	0.00	0.00	0.00	0.00
	Matching Revenue Funds:				
34	Other Federal Funds				
35	Other State Funds				
36	Other Government Funds				
37	Cash Contributions (non-government)				
38	In-Kind Contributions (equals line 24)	0.00	0.00	0.00	0.00
39	Program Income				
40	Other Matching Revenue				
41	**Total Matching Revenue Funds (lines 34 - 40)**	0.00	0.00	0.00	0.00
42	Other Program Funds				
43	**Total Revenue (lines 33, 41, & 42)**	0.00	0.00	0.00	0.00
	Reconciliation Between Total and Reimbursable Expenses				
51	Total Nongrant Expenses (line 25)	0.00	0.00	0.00	0.00
52	Subtract Other Unallowable Expenses (contractual)				
53	Subtract Excess Administration Expenses (contractual)				
54	Subtract Matching Expenses (equals line 41)	0.00	0.00	0.00	0.00
55	Reimbursable Expenses (line 51 minus lines 52,53,54)	0.00	0.00	0.00	0.00
56	Total Reimbursement To Date				
57	Difference (line 55 minus line 56)	0.00	0.00	0.00	0.00
58	Advances				
59	This reimbursement (line 57 minus line 58)	0.00	0.00	0.00	0.00

STATE OF TENNESSEE
TOTAL EXPENSE SUMMARY REPORT

Schedule C

Page # of # Pages:

Contractor/Grantee Name:

Report Period:

Line Item #	Expense By Object	Total Direct Program Expenses Year To Date	Total Nongrant/Unallowable Expenses Year To Date	Total Administrative Expenses Year To Date	Grand Total Year To Date
1	Salaries and Wages	0.00			0.00
2	Employee Benefits & Payroll Taxes	0.00			0.00
3	**Total Personnel Expenses**	0.00	0.00	0.00	0.00
4	Professional Fees	0.00			0.00
5	Supplies	0.00			0.00
6	Telecommunication	0.00			0.00
7	Postage and Shipping	0.00			0.00
8	Occupancy	0.00			0.00
9	Equipment Rental and Maintenance	0.00			0.00
10	Printing and Publications	0.00			0.00
11	Travel	0.00			0.00
12	Conferences and Meetings	0.00			0.00
13	Interest	0.00			0.00
14	Insurance	0.00			0.00
15	Grants and Awards	0.00			0.00
16	Specific Assistance to Individuals	0.00			0.00
17	Depreciation	0.00			0.00
18	Other Non-personnel Expenses: (list details in a-d)				
	a	0.00			0.00
	b	0.00			0.00
	c	0.00			0.00
	d	0.00			0.00
19	**Total Non-personnel Expenses**	0.00	0.00	0.00	0.00
20	Reimbursable Capital Purchases	0.00			0.00
21	**Total Direct Program Expenses**	0.00	0.00	0.00	0.00
22	Administrative Expenses	0.00			0.00
23	**Total Direct and Administrative Expenses**	0.00	0.00	0.00	0.00
24	In-Kind Expenses	0.00			0.00
25	**Total Expenses**	0.00	0.00	0.00	0.00

Attachment 6

Annual (Final) Report*

1. **Grantee Name:**
2. **Grant Contract Edison Number:**
3. **Grant Term:**
4. **Grant Amount:**
5. **Narrative Performance Details:** *(Description of program goals, outcomes, successes and setbacks, benchmarks or indicators used to determine progress, any activities that were not completed)*

Submit one copy to:

Lisa McAfee, Early Childhood Initiatives Section, Public Health Program Director at Lisa.McAfee@tn.gov;

fa.audit@tn.gov, TN Department of Finance and Administration

RLA-18175 **R-26-3-701**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Katie Huneycutt, PARKS AND RECREATION
Department:	PARKS AND RECREATION
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	YES

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting donations in the total amount of $5,622.00 and seven (7) barrels of non-perishable food items and approving the donation of the same to the Love Kitchen.
(Parks and Recreation)

Attachments

Resolution

KCPR Love Kitchen Donation

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, ACCEPTING DONATIONS IN THE TOTAL AMOUNT OF $5,622.00 AND SEVEN (7) BARRELS OF NON-PERISHABLE FOOD ITEMS AND APPROVING THE DONATION OF THE SAME TO THE LOVE KITCHEN.

RESOLUTION: **R-26-3-701**

REQUESTED BY: **PARKS & RECREATION**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County's 27th Annual Holiday Festival of Lights at The Cove at Concord Park was held from December 1 through December 30, 2025; and

WHEREAS, donations in the total amount of $5,622.00 and seven (7) barrels of non-perishable food items were collected from visitors at the event; and

WHEREAS, Knox County desires to donate said amount and food to the Love Kitchen in support of the Love Kitchen's mission to provide food and clothing to those who need it most in our community.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby accepts donations in the total amount of $5,622.00 and seven (7) barrels of non-perishable food items collected from visitors at the 27th Annual Holiday Festival of Lights at The Cove at Concord Park and approves the donation of the same to the Love Kitchen.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

KNOX COUNTY
TENNESSEE
PARKS & RECREATION

2447 Sutherland Ave
Knoxville, TN 37919
865-215-6600
parks@knoxcounty.org
knoxcounty.org/parks

TO: County Commission

FROM: Knox County Parks and Recreation

DATE: January, 9, 2026

SUBJECT: Love Kitchen Donations from 27th Annual Holiday Festival of Lights

Knox County Parks and Recreation have received donations in the total amount of $5,622.00 and seven (7) barrels of non perishable food items. The donations were collected from the 27th Annual Holiday Festival of Lights at the Cove at Concord Park and are to be donated to The Love Kitchen.

The consideration of a Resolution of the Commission of Knox County, Tennessee, accepting donations in the total amount of $5,622.00 and seven (7) barrels of non-perishable good items and approving the donation of the same to the Love Kitchen are scheduled on the Knox County February agenda.

Anna Roeder

Finance and Administration Director

Parks and Recreation
Office: 865-215-6610 | Cell: 865-369-8565

2447 Sutherland Avenue

Knoxville, TN 37919

KNOX COUNTY
TENNESSEE

RLA-18165 **R-26-3-702**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Katie Huneycutt, PARKS AND RECREATION
Department:	PARKS AND RECREATION
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving an Easement Agreement with Walker Enterprises, LLC to grant to Walker Enterprises the necessary right-of-way and easements on six (6) tracts for the Mont Richer, Unit 3 project. *(Parks and Recreation)*

Attachments

Resolution
Easement Agreement
Exhibit A
Exhibit B1
Exhibit C - Site Plans

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING AN EASEMENT AGREEMENT WITH WALKER ENTERPRISES, LLC TO GRANT TO WALKER ENTERPRISES THE NECESSARY RIGHT OF WAY AND EASEMENTS ON SIX (6) TRACTS FOR THE MONT RICHER, UNIT 3 PROJECT.

RESOLUTION: **R-26-3-702**

REQUESTED BY: **PARKS AND RECREATION**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Walker Enterprises, LLC is the owner of certain real property identified as "Lots 2, 3, 4, 5, 6, and 7 of Proposed Mont Richer Unit 3" (the "Development Property"); and

WHEREAS, Knox County is the owner of a parcel located along the northerly boundary of the Development Property (the "County Property"); and

WHEREAS, Knox County has agreed to grant to Walker Enterprises, LLC right of way and easements over a portion of the County Property for grading and signage, as further detailed in the attached Easement Agreement.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Easement Agreement with Walker Enterprises, LLC relative to the Mont Richer Unit 3 project is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Easement Agreement with Walker Enterprises, LLC relative to the Mont Richer Unit 3 project shall be executed subject to such amendment or action not affecting the substantive provisions of the agreement as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

This Instrument Prepared By:
Long, Ragsdale & Waters, P.C.
1111 Northshore Drive, N.W.
Suite S-700
Knoxville, Tennessee 37919

EASEMENT AGREEMENT

This Easement Agreement (the "Agreement"), made as of the ___ day of _____, 2026, between KNOX COUNTY, TENNESSEE ("County") and WALKER ENTERPRISES, LLC, a Tennessee limited liability company ("Developer").

RECITALS:

Pursuant to deed recorded as Instrument No. 202402270041204 in the Knox County Register's Office, Developer is the owner of certain property located in Knox County, Tennessee, which is identified as "Lots 2, 3, 4, 5, 6 and 7 of Proposed Mont Richer Unit 3" on Exhibit A attached here to ("Development Property").

County is the owner of a parcel located in Knox County, Tennessee, located along the northerly boundary of the Development Property which is identified as "Knox County" on Exhibit A attached hereto ("County Property").

In connection with the construction of improvements to the Development Property the parties have agreed that (a) the County shall grant to Developer for the benefit of the Development Property an easement over the portion of the County Property that is described on Exhibit B and (b) Developer shall grant and declare for the benefit of the Development Property an easement over the portion of the Development Property described on Exhibit B-1; both for use as a right-of-entry access and drainage easement for the benefit of the Development Property as shown on Exhibit A (the "Site Plan") in accordance with the Plans, as defined below.

The purpose of this Agreement is to establish easements for such grading and signage.

NOW, THEREFORE, in consideration of the premises herein contained and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereby covenant and agree as follows:

ARTICLE 1

INCORPORATION OF RECITALS

The foregoing Recitals are hereby incorporated into this Agreement by reference.

ARTICLE 2

DEFINITIONS

Unless otherwise defined herein, and unless the context shall otherwise prohibit or otherwise require, the following words and phrases shall have the following meanings in this Agreement:

2.1 "Agreement" shall mean this Easement Agreement and any and all amendments thereto duly filed for record in the Register's Office for Knox County, Tennessee.

2.2 "County Easement Area" means that portion of the County Property that is cross hatched and identified as "15' Wide Right of Entry Access and Drainage Easement from Knox County Access (5,250 sq. ft.)" on the Site Plan and described on Exhibit B.

2.3 "Development Easement Area" means that portion of the Development Property that is identified as "Drainage Easement Access Easement (17,995 sq. ft.)" on the Site Plan and described on Exhibit B-1.

2.4 "Easement Area" means the County Easement Area and the Development Easement Area.

2.5 "Lot" shall mean the County Property, the Development Property and/or either of them, depending upon the context in which the word Lot is used in this Agreement, and any further subdivision of either Lot.

2.6 "Lot Owner" shall mean any Person now or hereafter owning fee simple title to the County Property, the Development Property and/or either of them, as the context may require or any common or joint interest therein, as shown by the Public Records of Knox County, Tennessee.

2.7 "Permittee" shall mean any person that is a tenant or subtenant of a Lot Owner, and any officer, agent, employee, licensee, guest, invitee, independent contractor, developer or mortgagee of a Lot Owner, or its tenant or subtenants.

2.8 "Person" shall mean a natural person, corporation, partnership, association, trust, governmental body or other legal entity, or any combination thereof.

2.9 "Plans" shall mean the plans consisting of five (5) sheets prepared by Robert G. Campbell Associates, L.P. attached hereto as Exhibit C.

ARTICLE 3

PURPOSES

3.1 The purpose of this Agreement is to establish drainage easements.

3.2 This Agreement and all the provisions hereof are and shall be real covenants running with the Lots, and shall burden and bind the Lots. To that end, this Agreement shall be deemed incorporated into all deeds and conveyances hereinafter made by any Lot Owner until this Agreement is terminated. Every Person acquiring or holding any interest or estate in any portion of the Lot shall take or hold such interest or estate, or the security interest with respect thereto, with notice of the terms and provisions of this Agreement; and in accepting such interest or estate in, or a security interest with respect to, any portion of any Lot, and the terms of this Agreement shall be binding upon the Lot Owners and their successors and assigns.

ARTICLE 4

GRANT OF EASEMENTS; MAINTENANCE

(a) County hereby grants and conveys to Developer for the use and benefit of the Development Property for the use of the Owner(s) of the Development Property and their Permittees the permanent easement upon, under, over, above and across the County Easement Area, and (b) Developer hereby delivers, grants and conveys to and for the benefit of the Development Property for the use of the Owner(s) of the Development Property and their Permittees the permanent easement upon, under, over, above and across the Development Easement Area, both such grants and easements for access and for the discharge, drainage, use, detention and retention of storm water runoff in the manner and in the location indicated on the Site Plan, and to install, maintain, repair and replace storm water collection, retention, detention and distribution lines, conduits, pipes and other

apparatus (the "Drainage Facilities") under and across the Easement Area indicated on the Site Plan and substantially in accordance with the Plans. Developer and its successors and assigns shall be responsible for maintaining and repairing such Drainage Facilities.

ARTICLE 5

INDEMNITY; INSURANCE

5.1 Developer shall indemnify and hold County and its Permittees harmless from and against (a) all claims, liabilities and expenses (including reasonable attorneys' fees) relating to accidents, injuries, loss, or damage of or to any person or property arising from the defective work, negligent, intentional or willful acts or omissions of Developer or its Permittees in performing the work describing in this Agreement, its contractors, employees, agents, invitees or others acting on behalf of Developer and (b) any mechanics', materialmen's and/or laborers' liens arising from or related to any work performed or labor or materials provided in connection with the construction of the improvements on the Development Property under this Agreement, and, in the event any portion of the County Property shall become subject to any lien as a result of such work, then Developer promptly cause such lien to be released and discharged of record, either by paying the indebtedness which gave rise to such lien or posting such bond or other security as shall be required by law to obtain such release and discharge.

5.2 Throughout the term of this Agreement and until the construction and installation of the Drainage Easement is complete, Developer shall procure and maintain or cause to be maintained general and/or comprehensive public liability and property damage insurance against claims for personal injury (including contractual liability arising under the indemnity contained in Section 5.1 above), death, or property damage occurring upon Lot 2, with single limit coverage of not less than an aggregate of Two Million Dollars ($2,000,000.00)

including umbrella coverage, if any, and naming the County as an additional insured.

ARTICLE 6

MISCELLANEOUS PROVISIONS

6.1 No part of this Agreement may be terminated or modified without the prior written consent of the Lot Owners whose Lots will be affected.

6.2 This Agreement shall not create an association, partnership, joint venture or a principal and agency relationship between the Lot Owners or their tenants or licensees.

6.3 No waiver of any provision hereof shall be deemed to imply or constitute a further waiver thereof or any other provision set forth herein, and no waiver shall be effective unless in writing signed by the party against whom any such waiver is sought to be enforced.

6.4 Should any provision hereof be declared invalid by a legislative, administrative or judicial body of competent jurisdiction, the other provisions hereof shall remain in full force and effect and shall be unaffected by same.

6.5 Notices or other communication hereunder shall be in writing and shall be sent certified or registered mail, return receipt requested, or by other national overnight courier company, or personal delivery. Notice shall be deemed given upon receipt or refusal to accept delivery. Each party may change from time to time their respective address for notice hereunder by like notice to the other party. The notice addresses of the Lot Owners are as follows:

If to County: _____
_____
_____

If to Developer: _____
_____
_____

6.6 Intentionally Omitted.

6.7 The captions of each Article hereof as to the contents of each Article are intended only for convenience and are in no way to be construed as defining, limiting, extending, or otherwise modifying or adding to the particular Article to which an Article refers.

6.8 This Agreement shall be construed under and in accordance with the laws of the State of Tennessee.

6.9 Any Lot Owner, shall have the right to enforce the covenants contained in this Agreement, either by proceedings at law or in equity against any Person or Lot Owner violating or attempting to violate any covenant, either to restrain violation or to recover damages therefore.

6.10 The singular wherever used herein shall be construed to mean the plural when applicable, and the necessary grammatical changes required to make the provisions hereof apply either to corporations or other entities or to individuals, men or women, shall in all cases be assumed as though in each case fully expressed.

6.11 All Exhibits that are attached to this Agreement are by reference incorporated into this Agreement as if fully set forth in each paragraph in which an Exhibit is mentioned.

6.12 This Agreement shall bind and inure to the benefit of the parties, their successors and assigns.

IN WITNESS WHEREOF, the undersigned have executed this Easement Agreement as of the date and year first above written.

KNOX COUNTY, TENNESSEE

By:_____

Name:_____

Title:_____

STATE OF TENNESSEE
COUNTY OF KNOX

Before me, the undersigned, a notary public of the State and County aforesaid, personally appeared _____, with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who, upon oath, swore to and acknowledged ___self to be _____ of Knox County, Tennessee, the within-named bargainor, a _____, and that _he as such _____, executed the foregoing instrument for the purpose therein contained, by signing the name of the _____ by ___self as _____.

WITNESS my hand and seal at office in _____, this _____ day of _____, 2026.

_____
Notary Public

My commission expires:_____

WALKER ENTERPRISES, LLC

By:_____

Name:_____

Title:_____

STATE OF TENNESSEE
COUNTY OF KNOX

Before me, the undersigned, a notary public of the State and County aforesaid, personally appeared _____, with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who, upon oath, swore to and acknowledged ___self to be _____ of WALKER ENTERPRISES, LLC, the within-named bargainor, a Tennessee limited liability company, and that _he as such _____, executed the foregoing instrument for the purpose therein contained, by signing the name of the _____ by ___self as _____.

WITNESS my hand and seal at office in _____, this _____ day of _____, 2026.

_____
Notary Public

My commission expires:_____

EXHIBIT A

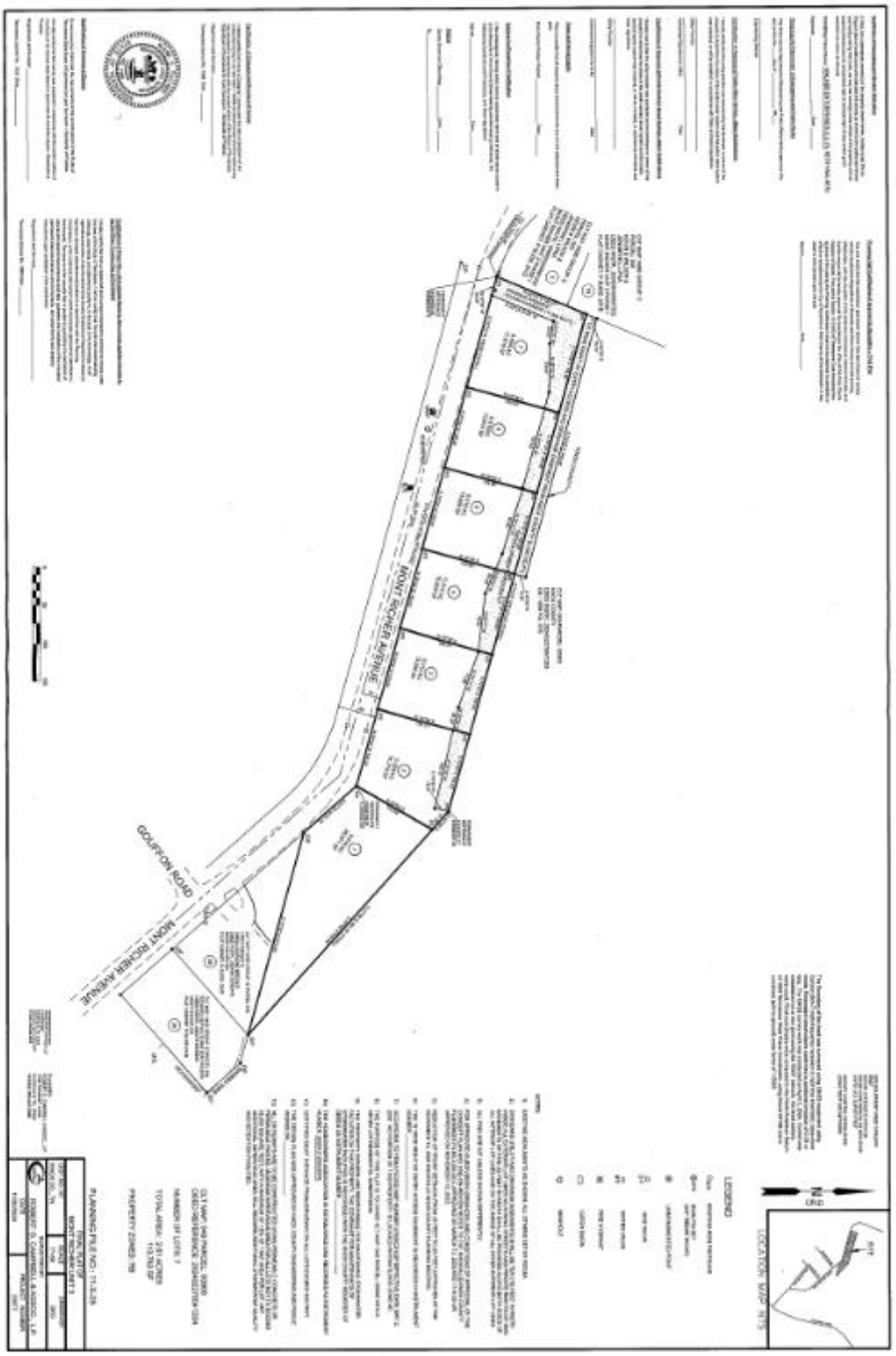

MONT RICHER AVENUE
GOUPPON ROAD
MONT RICHER AVENUE
LOCATION MAP
LEGEND

EXHIBIT B

Situated in the Seventh (7th) Civil District of Knox County, Tennessee and being known and designated as a 15 foot Right of Entry Access and Drainage Easement and being more particularly described as follows:

Commencing at an iron pin set on the northern right-of-way of Mont Richer Avenue, said point being located 427 feet more or less in a southeasterly direction from the centerline of Virginia Lee Avenue; thence along the eastern lines of Lots 2 and 79 of Mont Richer Unit 2 Phase 1 North 22 degrees 53 minutes East 126.01 feet to an iron pin set; said pin being the Point of Beginning; thence continuing with said Lot 79 North 22 degrees 53 minutes East 15.12 feet to a point; thence along the northern line of the 15 foot Right of Entry Access and Drainage Easement described herein the following two calls:

South 74 degrees 22 minutes East 349.09 feet to a point; thence

South 15 degrees 38 minutes West 15.00 feet to an iron pin set; thence along the proposed northern line of Lot 5 Mont Richer Unit 3 North 74 degrees 22 minutes West 109.00 feet to an iron pin set; thence along the proposed northern line of Lot 6 Mont Richer Unit 3 North 74 degrees 22 minutes West 109.00 feet to an iron pin set; thence along the proposed northern line of Lot 7 Mont Richer Unit 3 North 74 degrees 22 minutes West 133.00 feet to an iron pin set; said pin being the POINT OF BEGINNING containing 5,250 square feet, more or less.

Being part of the same property conveyed to Knox County, Tennessee from State of Tennessee by Quit Claim Deed dated February 8, 1980, and recorded as Deed Book 1699 Page 576, in the Knox County Register of Deeds Office, Knoxville, Tennessee.

EXHIBIT B-1

EXHIBIT "B-1"

Situated in the Seventh (7th) Civil District of Knox County, Tennessee, and being known and designated as a Drainage Easement and Access Easement being more particularly described as follows:

Beginning at an iron pin set on the northern right-of-way of Mont Richer Avenue, said point being located 427 feet more or less in a southeasterly direction from the centerline of Virginia Lee Avenue; thence along the eastern lines of Lots 2 and 79 of Mont Richer Unit 2 Phase 1 North 22 degrees 53 minutes East 126.01 feet to an iron pin set; thence along the southern line of Knox County the following six calls:

South 74 degrees 22 minutes East 133.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 104.62 feet to an iron pin set; thence along the eastern line of the Drainage Easement and Access Easement described herein South 13 degrees 20 minutes East 18.34 feet to a point; thence along the southern line of the Drainage Easement and Access Easement described herein the following ten calls:

North 76 degrees 40 minutes West 105.13 feet to a point; thence

North 76 degrees 24 minutes West 30.22 feet to a point; thence

North 70 degrees 17 minutes West 77.98 feet to a point; thence

North 83 degrees 17 minutes West 76.92 feet to a point; thence

North 66 degrees 43 minutes West 56.48 feet to a point; thence

North 72 degrees 13 minutes West 80.80 feet to a point; thence

North 74 degrees 28 minutes West 137.52 feet to a point; thence

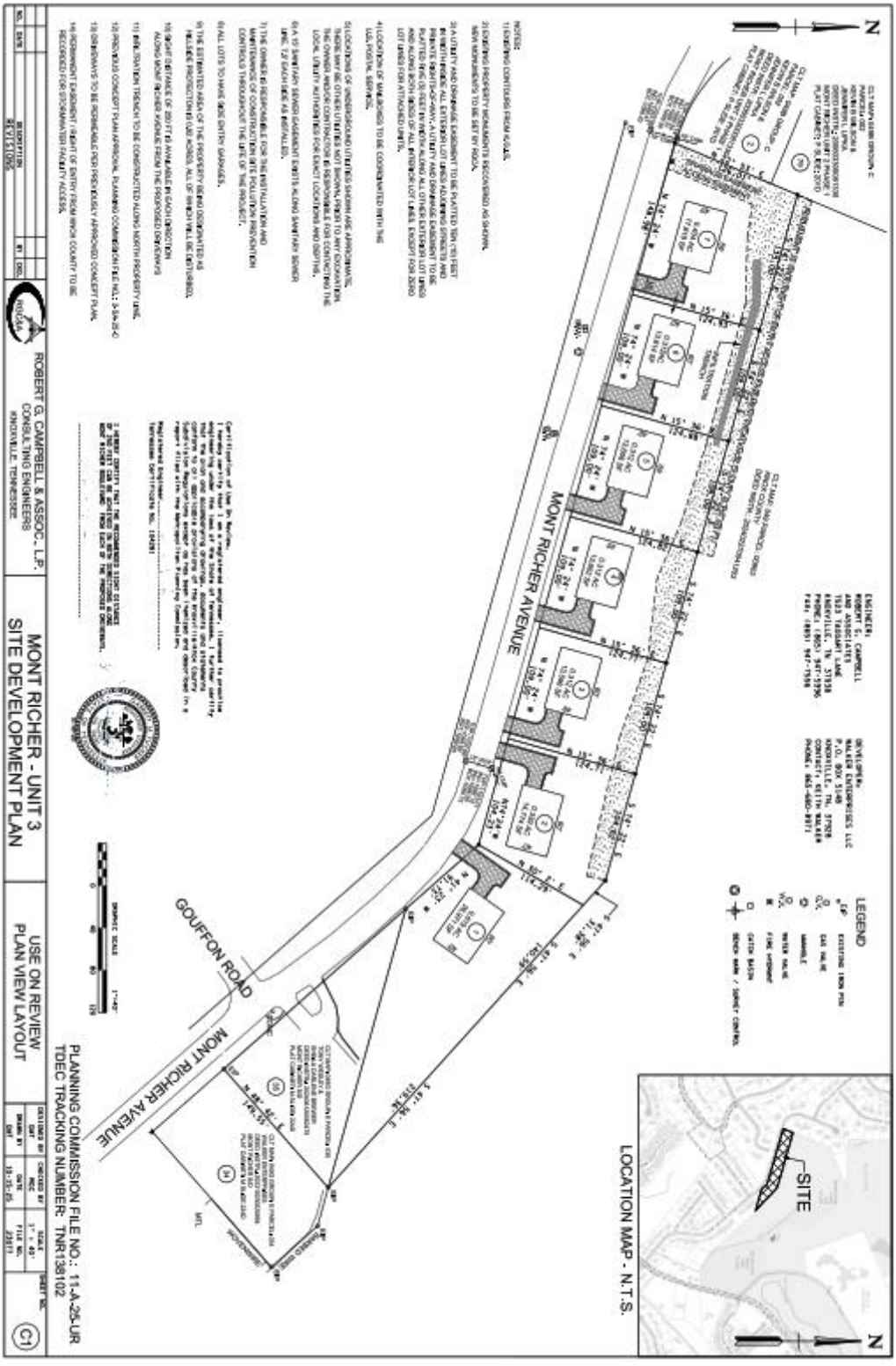
North 88 degrees 45 minutes West 63.44 feet to a point; thence

North 80 degrees 31 minutes West 29.51 feet to a point; thence

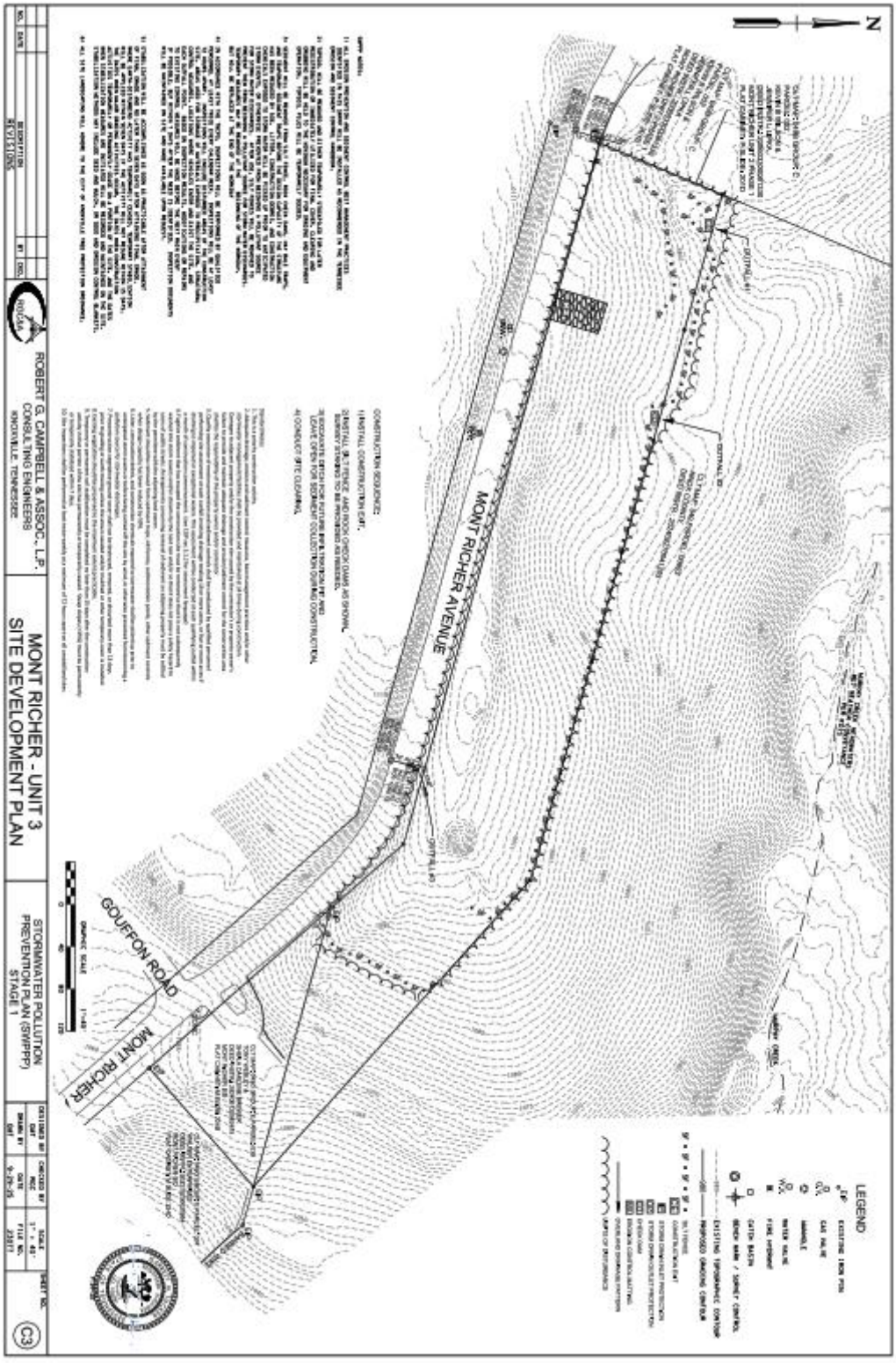
South 22 degrees 53 minutes West 87.14 feet to a point; thence following the northern right-of-way of Mont Richer Avenue North 74 degrees 24 minutes West 25.20 feet to a point; said point being the POINT OF BEGINNING containing 17,995 square feet, more or less.

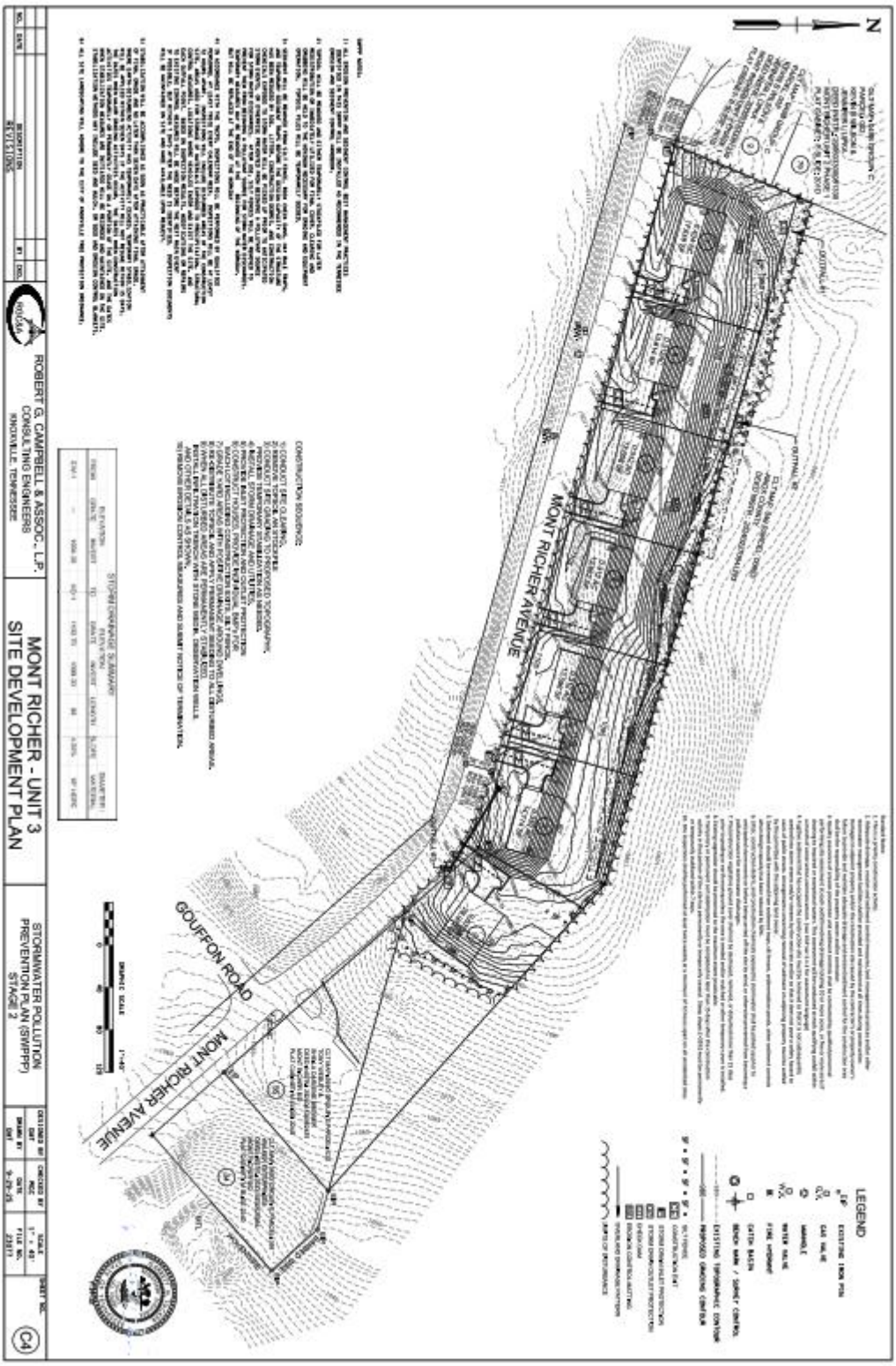
Being part of the same property conveyed to Walker Enterprises LLC from Knox County, Tennessee by Quit Claim Deed dated February 22, 2024, and recorded as Deed Instrument Number 202402270041204, in the Knox County Register of Deeds Office, Knoxville, Tennessee.

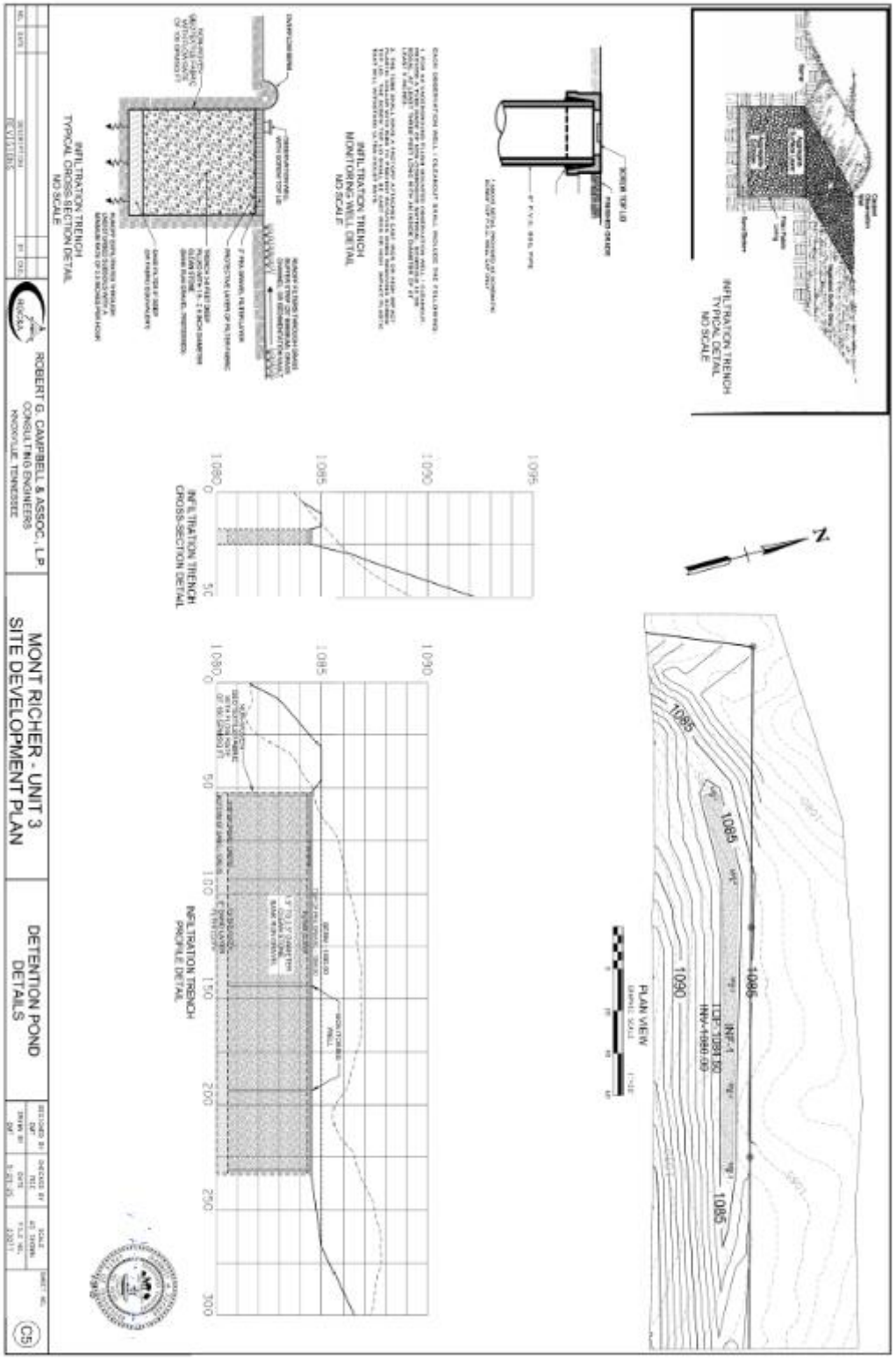
EXHIBIT C

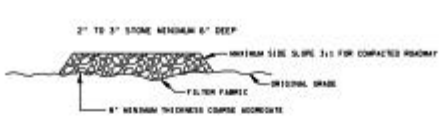

MONT RICHER AVENUE
GOUFFON ROAD
MONT RICHER AVENUE
SITE
LOCATION MAP - N.T.S.
LEGEND
MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN
USE ON REVIEW
PLAN VIEW LAYOUT
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE
PLANNING COMMISSION FILE NO.: 11-A-25-UR
TDEC TRACKING NUMBER: TNR138102

MONT RICHER AVENUE
GOUEFON ROAD
MONT RICHER AVENUE
TYPICAL LOT LAYOUT
NO SCALE
EXISTING PUBLIC ROAD
LEGEND
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE
MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN
USE ON REVIEW
GRADING & DRAINAGE PLAN
C2

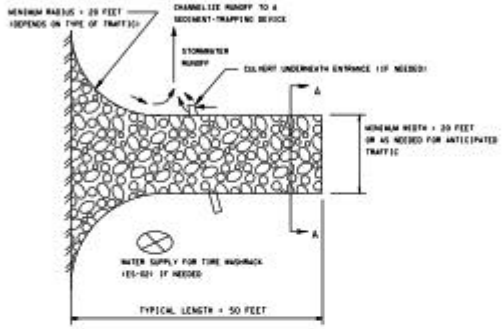

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN
STORMWATER POLLUTION PREVENTION PLAN (SWPPP)
STAGE 1
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE
MONT RICHER AVENUE
GOUFFON ROAD
MONT RICHER
LEGEND
N


MONT RICHER AVENUE
GOUFFON ROAD
MONT RICHER AVENUE
LEGEND
EXISTING IRON PIN
GAS VALVE
MANHOLE
WATER VALVE
FIRE HYDRANT
GATED WATER
BENCH MARK / SURVEY CONTROL
EXISTING TEMPORARY/MINOR CONTOUR
PROPOSED GRADING CONTOUR
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE
MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN
STORMWATER POLLUTION PREVENTION PLAN (SWPPP) STAGE 2
DESIGNED BY: DBT
DRAWN BY: DBT
CHECKED BY: RGC
DATE: 5-21-25
SCALE: 1" = 40'
FILE NO.: 23017
SHEET NO.: C4

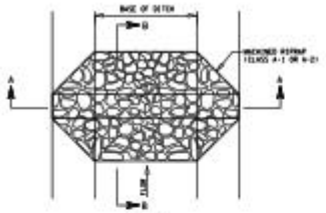

INFILTRATION TRENCH
TYPICAL DETAIL
NO SCALE
INFILTRATION TRENCH
MONITORING WELL DETAIL
NO SCALE
INFILTRATION TRENCH
TYPICAL CROSS-SECTION DETAIL
NO SCALE
INFILTRATION TRENCH
CROSS-SECTION DETAIL
INFILTRATION TRENCH
PROFILE DETAIL
PLAN VIEW
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE
MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN
DETENTION POND
DETAILS
C5



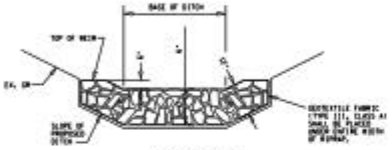
SECTION A-A



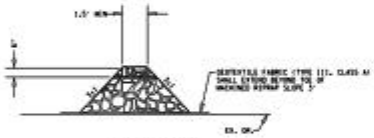
CONSTRUCTION EXIT DETAIL



PLAN

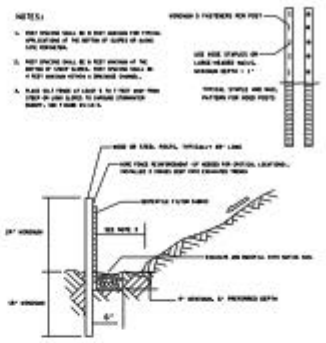


SECTION A-A

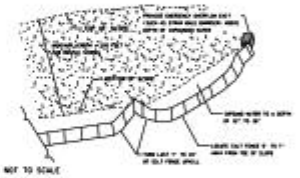


SECTION B-B

ROCK DAM DETAIL



TYPICAL SILT FENCE INSTALLATION



NOT TO SCALE

SILT FENCE (BELOW A STEEP OR LONG SLOPE)

NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

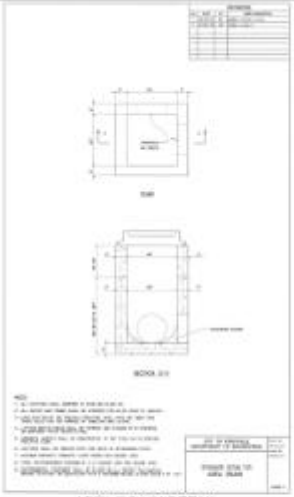
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

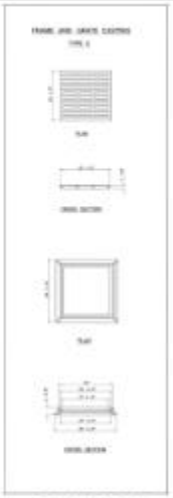
STORMWATER POLLUTION
PREVENTION PLAN (SWPPP)
STAGE 2

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
DMT	RGC	1" = 40'	C6
DRAWN BY	DATE	FILE NO.	
DMT	9-29-25	23017	

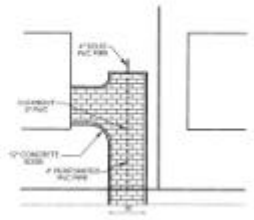
DBR 2025\Campbell & Associates\Mont Richer
11619-018 Easement Agreement



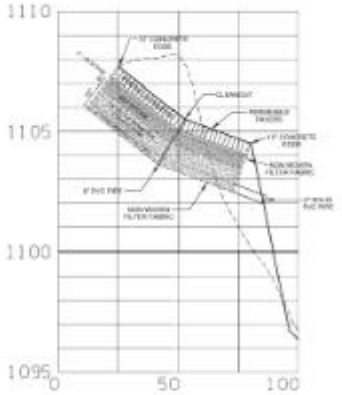
AREA DRAIN DETAIL
NO SCALE



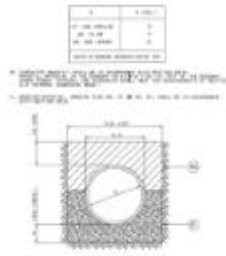
FRAME & GRATE
DETAILS
NO SCALE



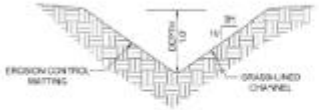
PERMEABLE PAVEMENT DRIVEWAY
PLAN VIEW



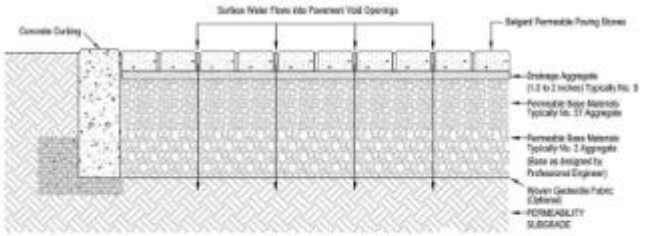
PERMEABLE PAVEMENT DRIVEWAY
PROFILE



PIPE BEDDING DETAIL
NO SCALE



SWALE
TYPICAL DETAIL



PERMEABLE PAVEMENT
TYPICAL DETAIL
NO SCALE

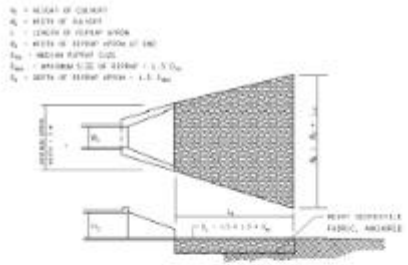
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

DETAILS

C7

DBR 2025\Campbell & Associates\Mont Richer
11619-018 Easement Agreement



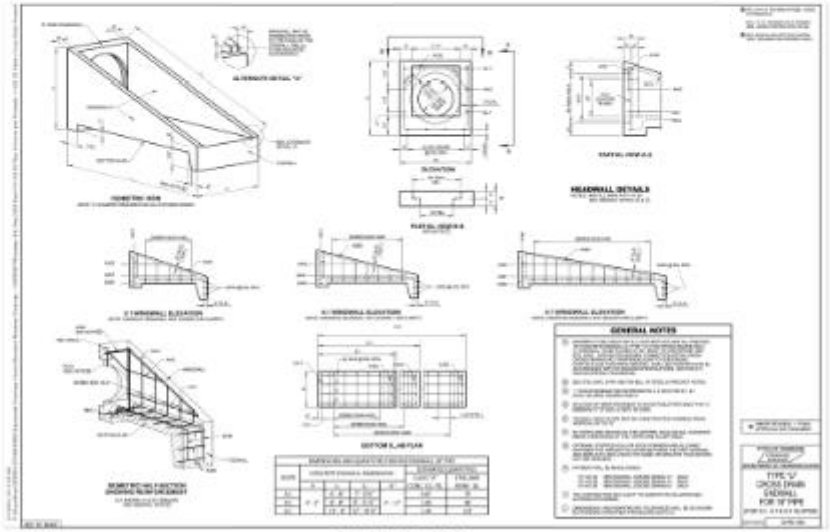
RIPRAP OUTLET PROTECTION



RIP-RAP SLOPE DETAIL
NO SCALE



STORM DRAIN
INLET PROTECTION



ENDWALL DETAIL

NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

DETAILS

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
DMT	TEC	NO SCALE	C8
DRAWN BY	DATE	FILE NO.	
DMT	9-23-25	23077	

DBR 2025\Campbell & Associates\Mont Richer
11619-018 Easement Agreement

Certificate of Ownership and General Dedication

(I, We), the undersigned owner(s) of the property shown herein, hereby adopt this as (my,our) plan of subdivision and dedicate the streets as shown to the public use forever and hereby certify that (I am, we are) the owner(s) in fee simple of the property, and as property owners have an unrestricted right to dedicate right-of-way and/or grant easement as shown on this plat

OWNER(s) Printed Name: WALKER ENTERPRISES LLC (% KEITH WALKER)

Signature: _____ Date: _____

Knox County Department of Engineering and Public Works

The Knox County Department of Engineering and Public Works hereby approves this plat on this the _____day of _____, 20___

_____
Engineering Director

Certification of Approval of Public Water System – Major Subdivisions

I hereby certify that the utility provider was contacted by the developer or owner of the property to determine the status of the public water system and the public water system was installed, or will be installed, in accordance with State and local regulations.

_____
Utility Provider

_____
Authorized Signature for Utility Date

Certification of Approval of Public Sanitary Sewer System - Major Subdivisions

I hereby certify that the utility provider was contacted by the developer or owner of the property to determine the status of the public sanitary sewer system and the public sanitary sewer system was installed, or will be installed, in accordance with State and local regulations.

_____
Utility Provider

_____
Authorized Signature for Utility Date

Taxes and Assessments

This is to certify that all property taxes and assessments due on this property have been paid.

Knox County Trustee: Signed:_____ Date:_____

Addressing Department Certification

I, the undersigned, hereby certify that the subdivision name and all street names conform to the Knoxville or Knox County Street Naming and Addressing Ordinance, the Addressing Guidelines and Procedures, and these regulations.

Signed:_____ Date:_____

Zoning

Zoning Shown on Official Map_____Date: _____

By_____

Planning Staff Certification of Approval for Recording – Final Plat

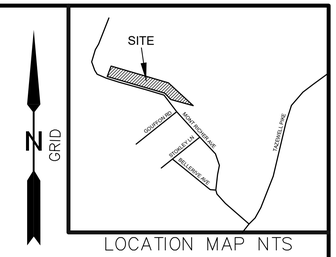
This is to certify that the subdivision plat shown hereon has been found to comply with the Subdivision Regulations of Knoxville and Knox County and with existing official plans, with the exception of any variances and waivers noted on this plat, and that the record plat is hereby approved for recording in the office of the Knox County Register of Deeds. Pursuant to Section 13-3-405 of Tennessee Code Annotated the approval of this plat by the Planning Commission shall not be deemed to constitute or effect an acceptance by the City of Knoxville or Knox County of the dedication of any street or other ground upon the plat.

Signed:_____ Date:_____

GPS EQUIPMENT USED: CARLSON BRX7
DATUM: NAD83(2011) NAVD 88
GEOID: CONTINENTAL US NGS 2012B
UNITS: U.S. SURVEY FEET

SURVEY CONTROL ESTABLISHED USING TDOT VRS NETWORK

The Boundary of this tract was surveyed using GNSS equipment using Carlson BrX-7 multi-frequency receivers in real time kinematic, base-rover mode. Redundant observations confirmed a positional precision of 0.04 or less. The GNSS survey work was conducted on April 3, 2024. Control was established on a new point using the TDOT network, No fixed stations were used. Final coordinates were computed in the North American Datum of 1983 Tennessee State Plane Coordinates, using Geoid 2012B and a combined (grid to ground) scale factor of 1.0000



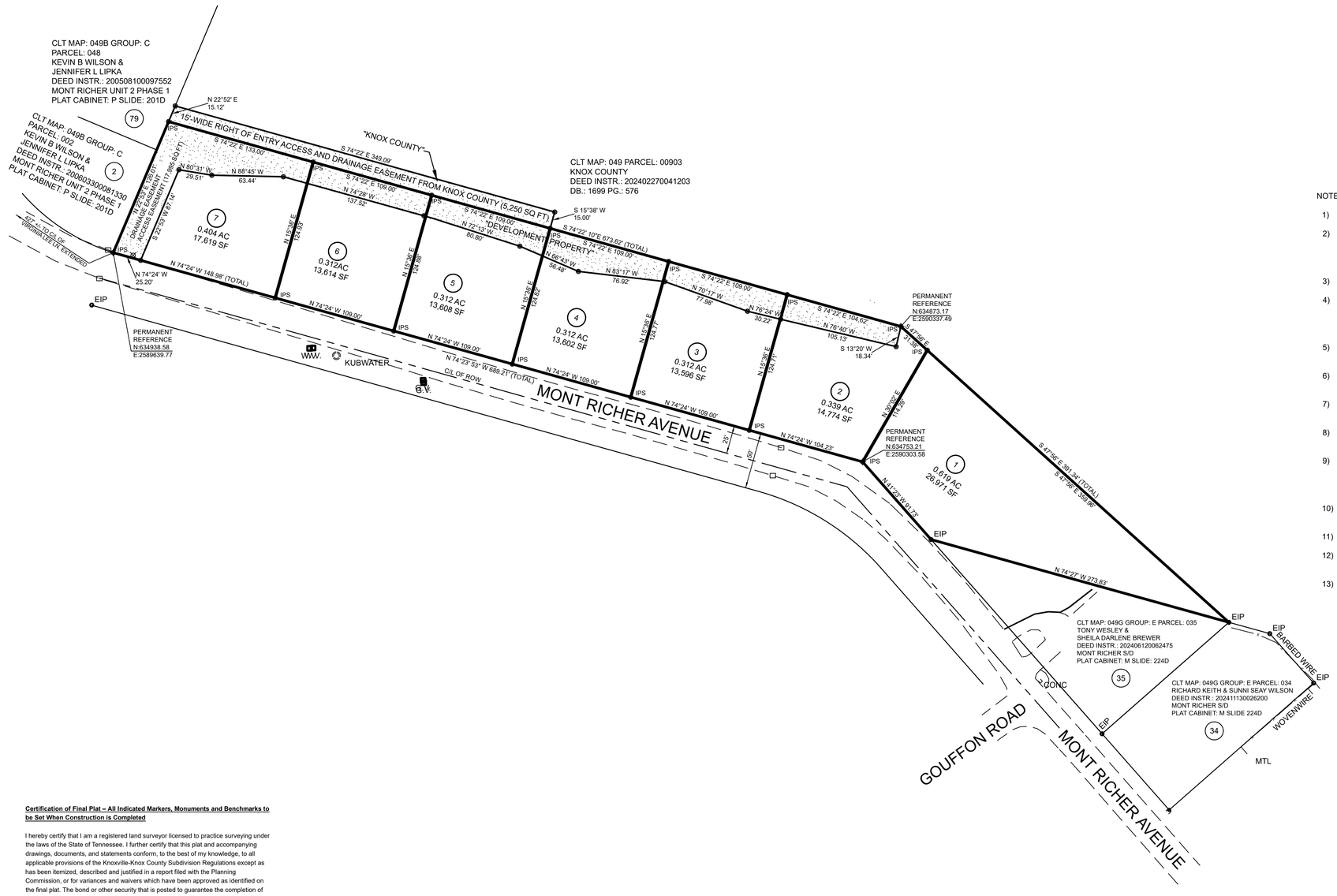

CLT MAP: 049B GROUP: C
PARCEL: 048
KEVIN B WILSON &
JENNIFER L LIPKA
DEED INSTR.: 200508100097552
MONT RICHER UNIT 2 PHASE 1
PLAT CABINET: P SLIDE: 201D
CLT MAP: 049B GROUP: C
PARCEL: 002
KEVIN B WILSON &
JENNIFER L LIPKA
DEED INSTR.: 200603300081330
MONT RICHER UNIT 2 PHASE 1
PLAT CABINET: P SLIDE: 201D
CLT MAP: 049 PARCEL: 00903
KNOX COUNTY
DEED INSTR.: 202402270041203
DB.: 1699 PG.: 576
"KNOX COUNTY"
"DEVELOPMENT PROPERTY"
15'-WIDE RIGHT OF ENTRY ACCESS AND DRAINAGE EASEMENT FROM KNOX COUNTY (5,250 SQ FT)
DRAINAGE EASEMENT
ACCESS EASEMENT (17,998 SQ FT)
0.404 AC
17,619 SF
0.312AC
13,614 SF
0.312 AC
13,808 SF
0.312 AC
13,602 SF
0.312 AC
13,596 SF
0.339 AC
14,774 SF
0.619 AC
26,971 SF
MONT RICHER AVENUE
GOUFFON ROAD
KUBWATER
W.V.
G.V.
C/L OF ROW
EIP
IPS
PERMANENT REFERENCE N:634938.58 E:2589639.77
PERMANENT REFERENCE N:634873.17 E:2590337.49
PERMANENT REFERENCE N:634753.21 E:2590303.58
N 22°52' E 15.12'
S 74°22' E 349.09'
S 74°22' E 133.00'
S 74°22' E 109.00'
S 74°22' E 673.62' (TOTAL)
S 74°22' E 104.62'
S 15°38' W 15.00'
N 80°31' W 29.51'
N 88°45' W 63.44'
N 74°28' W 137.52'
N 72°13' W 80.80'
N 66°43' W 56.48'
N 83°17' W 76.92'
N 70°17' W 77.98'
N 76°24' W 30.22'
N 76°40' W 105.13'
S 13°20' W 18.34'
N 74°24' W 148.98' (TOTAL)
N 74°24' W 25.20'
N 74°24' W 109.00'
N 74°23' 53" W 689.21' (TOTAL)
N 74°24' W 104.23'
N 44°23' W 91.28'
S 47°56' E 391.34' (TOTAL)
S 47°56' E 368.90'
N 74°27' W 273.83'
N 15°38' E 124.83'
N 15°38' E 124.98'
N 15°38' E 124.62'
N 15°38' E 124.77'
N 15°38' E 124.99'
N 15°38' E 124.99'
N 15°38' E 124.99

EXHIBIT "B-1"

Situated in the Seventh (7th) Civil District of Knox County, Tennessee, and being known and designated as a Drainage Easement and Access Easement being more particularly described as follows:

Beginning at an iron pin set on the northern right-of-way of Mont Richer Avenue, said point being located 427 feet more or less in a southeasterly direction from the centerline of Virginia Lee Avenue; thence along the eastern lines of Lots 2 and 79 of Mont Richer Unit 2 Phase 1 North 22 degrees 53 minutes East 126.01 feet to an iron pin set; thence along the southern line of Knox County the following six calls:

South 74 degrees 22 minutes East 133.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 109.00 feet to an iron pin set; thence

South 74 degrees 22 minutes East 104.62 feet to an iron pin set; thence along the eastern line of the Drainage Easement and Access Easement described herein South 13 degrees 20 minutes East 18.34 feet to a point; thence along the southern line of the Drainage Easement and Access Easement described herein the following ten calls:

North 76 degrees 40 minutes West 105.13 feet to a point; thence

North 76 degrees 24 minutes West 30.22 feet to a point; thence

North 70 degrees 17 minutes West 77.98 feet to a point; thence

North 83 degrees 17 minutes West 76.92 feet to a point; thence

North 66 degrees 43 minutes West 56.48 feet to a point; thence

North 72 degrees 13 minutes West 80.80 feet to a point; thence

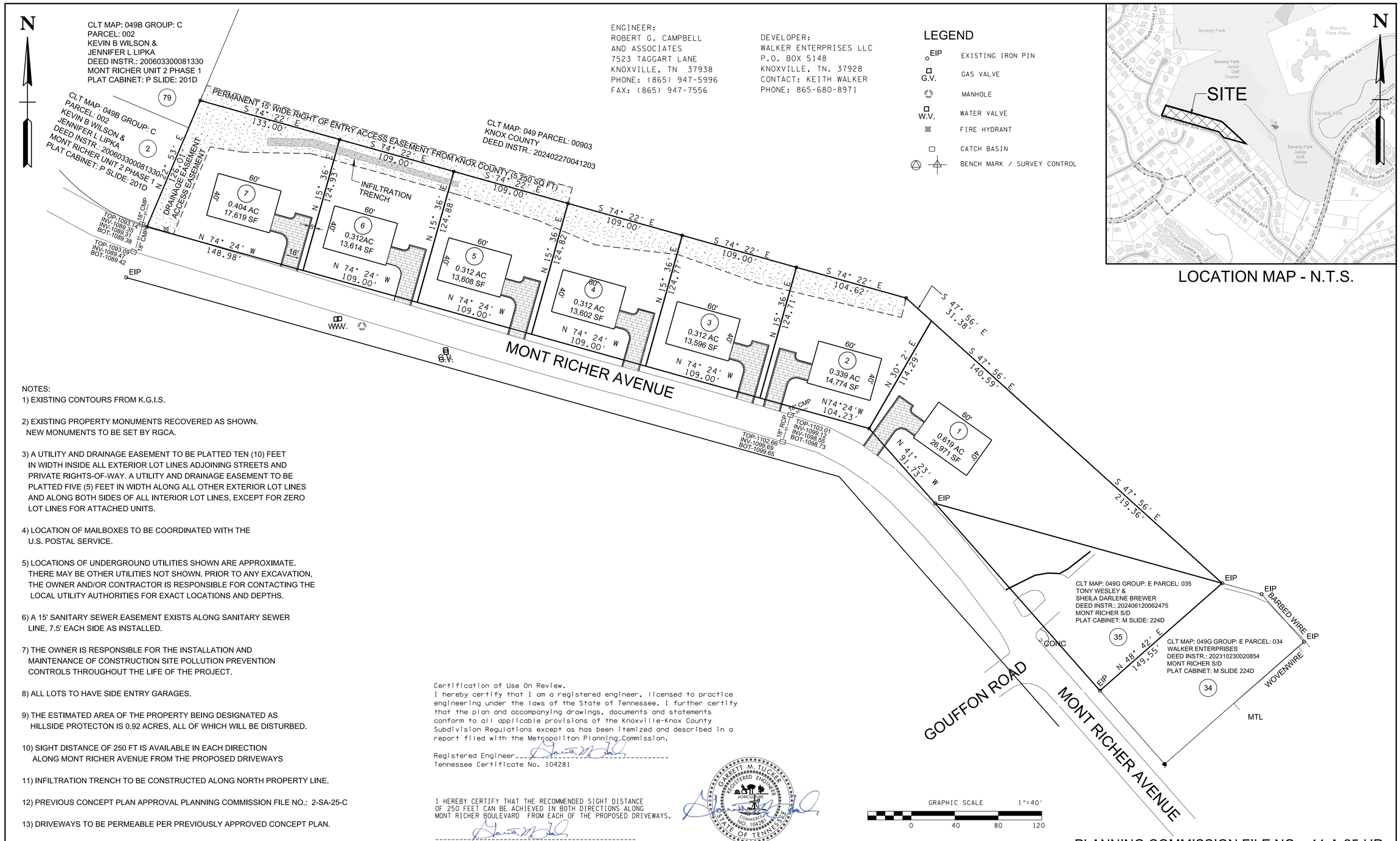
North 74 degrees 28 minutes West 137.52 feet to a point; thence

North 88 degrees 45 minutes West 63.44 feet to a point; thence

North 80 degrees 31 minutes West 29.51 feet to a point; thence

South 22 degrees 53 minutes West 87.14 feet to a point; thence following the northern right-of-way of Mont Richer Avenue North 74 degrees 24 minutes West 25.20 feet to a point; said point being the POINT OF BEGINNING containing 17,995 square feet, more or less.

Being part of the same property conveyed to Walker Enterprises LLC from Knox County, Tennessee by Quit Claim Deed dated February 22, 2024, and recorded as Deed Instrument Number 202402270041204, in the Knox County Register of Deeds Office, Knoxville, Tennessee.



ENGINEER:
ROBERT G. CAMPBELL
AND ASSOCIATES
7523 TAGGART LANE
KNOXVILLE, TN 37938
PHONE: (865) 947-5996
FAX: (865) 947-7556

DEVELOPER:
WALKER ENTERPRISES LLC
P.O. BOX 5148
KNOXVILLE, TN. 37928
CONTACT: KEITH WALKER
PHONE: 865-680-8971

LEGEND

- EIP — EXISTING IRON PIN
- G.V. — GAS VALVE
- MANHOLE
- W.V. — WATER VALVE
- FIRE HYDRANT
- CATCH BASIN
- BENCH MARK / SURVEY CONTROL

LOCATION MAP - N.T.S.

NOTES:

1) EXISTING CONTOURS FROM K.G.I.S.

2) EXISTING PROPERTY MONUMENTS RECOVERED AS SHOWN. NEW MONUMENTS TO BE SET BY RGCA.

3) A UTILITY AND DRAINAGE EASEMENT TO BE PLATTED TEN (10) FEET IN WIDTH INSIDE ALL EXTERIOR LOT LINES ADJOINING STREETS AND PRIVATE RIGHTS-OF-WAY. A UTILITY AND DRAINAGE EASEMENT TO BE PLATTED FIVE (5) FEET IN WIDTH ALONG ALL OTHER EXTERIOR LOT LINES AND ALONG BOTH SIDES OF ALL INTERIOR LOT LINES, EXCEPT FOR ZERO LOT LINES FOR ATTACHED UNITS.

4) LOCATION OF MAILBOXES TO BE COORDINATED WITH THE U.S. POSTAL SERVICE.

5) LOCATIONS OF UNDERGROUND UTILITIES SHOWN ARE APPROXIMATE. THERE MAY BE OTHER UTILITIES NOT SHOWN. PRIOR TO ANY EXCAVATION, THE OWNER AND/OR CONTRACTOR IS RESPONSIBLE FOR CONTACTING THE LOCAL UTILITY AUTHORITIES FOR EXACT LOCATIONS AND DEPTHS.

6) A 15' SANITARY SEWER EASEMENT EXISTS ALONG SANITARY SEWER LINE, 7.5' EACH SIDE AS INSTALLED.

7) THE OWNER IS RESPONSIBLE FOR THE INSTALLATION AND MAINTENANCE OF CONSTRUCTION SITE POLLUTION PREVENTION CONTROLS THROUGHOUT THE LIFE OF THE PROJECT.

8) ALL LOTS TO HAVE SIDE ENTRY GARAGES.

9) THE ESTIMATED AREA OF THE PROPERTY BEING DESIGNATED AS HILLSIDE PROTECTON IS 0.92 ACRES, ALL OF WHICH WILL BE DISTURBED.

10) SIGHT DISTANCE OF 250 FT IS AVAILABLE IN EACH DIRECTION ALONG MONT RICHER AVENUE FROM THE PROPOSED DRIVEWAYS

11) INFILTRATION TRENCH TO BE CONSTRUCTED ALONG NORTH PROPERTY LINE.

12) PREVIOUS CONCEPT PLAN APPROVAL PLANNING COMMISSION FILE NO.: 2-SA-25-C

13) DRIVEWAYS TO BE PERMEABLE PER PREVIOUSLY APPROVED CONCEPT PLAN.

14) PERMANENT EASEMENT / RIGHT OF ENTRY FROM KNOX COUNTY TO BE RECORDED FOR STORMWATER FACILITY ACCESS.

Certification of Use On Review.
I hereby certify that I am a registered engineer, licensed to practice engineering under the laws of the State of Tennessee. I further certify that the plan and accompanying drawings, documents and statements conform to all applicable provisions of the Knoxville-Knox County Subdivision Regulations except as has been itemized and described in a report filed with the Metropolitan Planning Commission.

Registered Engineer _____
Tennessee Certificate No. 104281

I HEREBY CERTIFY THAT THE RECOMMENDED SIGHT DISTANCE OF 250 FEET CAN BE ACHIEVED IN BOTH DIRECTIONS ALONG MONT RICHER BOULEVARD FROM EACH OF THE PROPOSED DRIVEWAYS.

_____

GARRETT M. TUCKER REGISTERED ENGINEER AGRICULTURE COMMERCE NO. 104281 STATE OF TENNESSEE
10-15-25

PLANNING COMMISSION FILE NO.: 11-A-25-UR
TDEC TRACKING NUMBER: TNR138102

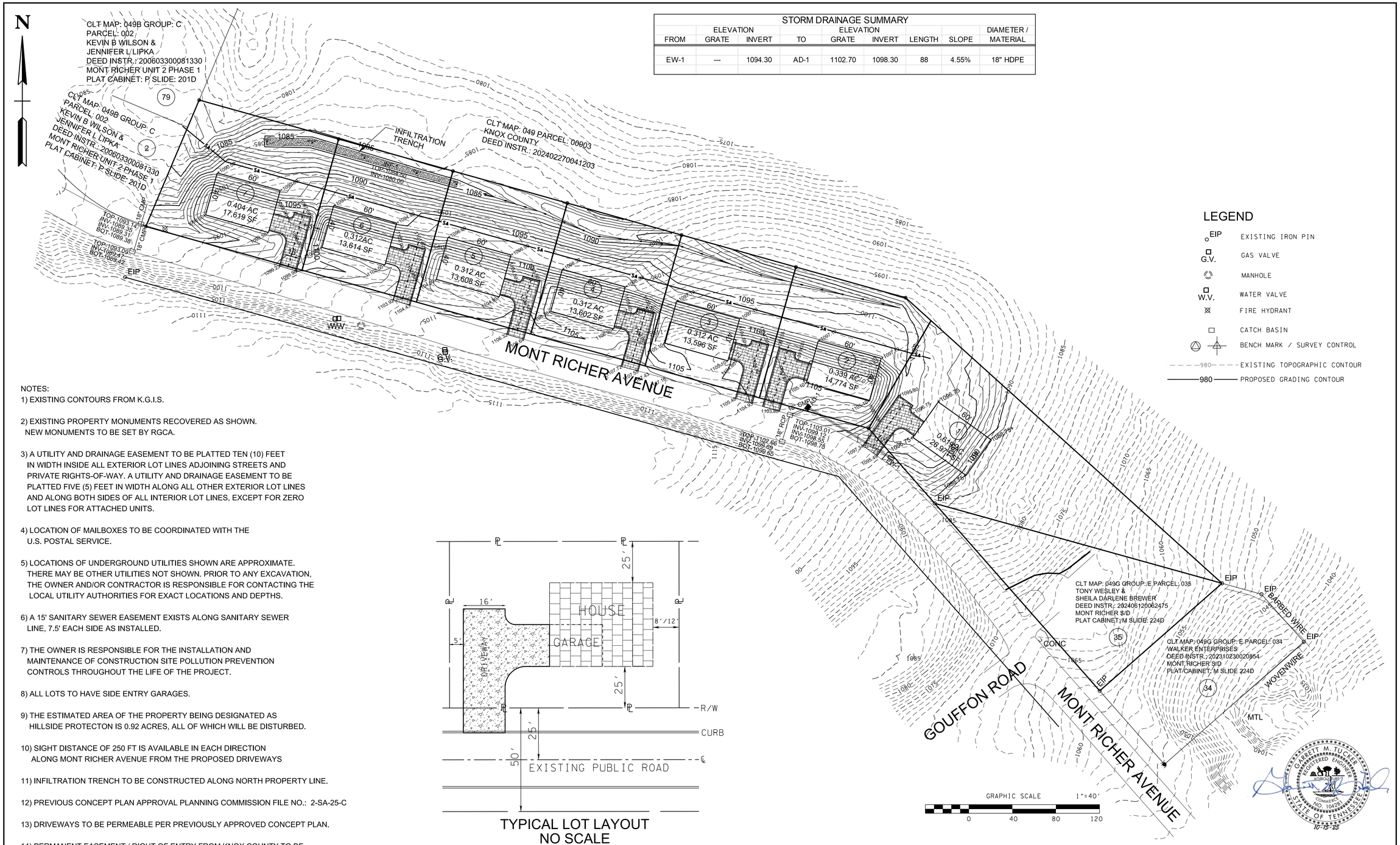
NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

RGC&A
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

USE ON REVIEW
PLAN VIEW LAYOUT

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	1" = 40'	C1
DRAWN BY	DATE	FILE NO.	
GMT	10-15-25	23077	



STORM DRAINAGE SUMMARY								
	ELEVATION			ELEVATION				DIAMETER /
FROM	GRATE	INVERT	TO	GRATE	INVERT	LENGTH	SLOPE	MATERIAL
EW-1	---	1094.30	AD-1	1102.70	1098.30	88	4.55%	18" HDPE

LEGEND

- EIP — EXISTING IRON PIN
- G.V. — GAS VALVE
- MANHOLE
- W.V. — WATER VALVE
- FIRE HYDRANT
- CATCH BASIN
- BENCH MARK / SURVEY CONTROL
- 980 — EXISTING TOPOGRAPHIC CONTOUR
- 980 — PROPOSED GRADING CONTOUR

NOTES:

1) EXISTING CONTOURS FROM K.G.I.S.

2) EXISTING PROPERTY MONUMENTS RECOVERED AS SHOWN. NEW MONUMENTS TO BE SET BY RGCA.

3) A UTILITY AND DRAINAGE EASEMENT TO BE PLATTED TEN (10) FEET IN WIDTH INSIDE ALL EXTERIOR LOT LINES ADJOINING STREETS AND PRIVATE RIGHTS-OF-WAY. A UTILITY AND DRAINAGE EASEMENT TO BE PLATTED FIVE (5) FEET IN WIDTH ALONG ALL OTHER EXTERIOR LOT LINES AND ALONG BOTH SIDES OF ALL INTERIOR LOT LINES, EXCEPT FOR ZERO LOT LINES FOR ATTACHED UNITS.

4) LOCATION OF MAILBOXES TO BE COORDINATED WITH THE U.S. POSTAL SERVICE.

5) LOCATIONS OF UNDERGROUND UTILITIES SHOWN ARE APPROXIMATE. THERE MAY BE OTHER UTILITIES NOT SHOWN. PRIOR TO ANY EXCAVATION, THE OWNER AND/OR CONTRACTOR IS RESPONSIBLE FOR CONTACTING THE LOCAL UTILITY AUTHORITIES FOR EXACT LOCATIONS AND DEPTHS.

6) A 15' SANITARY SEWER EASEMENT EXISTS ALONG SANITARY SEWER LINE, 7.5' EACH SIDE AS INSTALLED.

7) THE OWNER IS RESPONSIBLE FOR THE INSTALLATION AND MAINTENANCE OF CONSTRUCTION SITE POLLUTION PREVENTION CONTROLS THROUGHOUT THE LIFE OF THE PROJECT.

8) ALL LOTS TO HAVE SIDE ENTRY GARAGES.

9) THE ESTIMATED AREA OF THE PROPERTY BEING DESIGNATED AS HILLSIDE PROTECTON IS 0.92 ACRES, ALL OF WHICH WILL BE DISTURBED.

10) SIGHT DISTANCE OF 250 FT IS AVAILABLE IN EACH DIRECTION ALONG MONT RICHER AVENUE FROM THE PROPOSED DRIVEWAYS

11) INFILTRATION TRENCH TO BE CONSTRUCTED ALONG NORTH PROPERTY LINE.

12) PREVIOUS CONCEPT PLAN APPROVAL PLANNING COMMISSION FILE NO.: 2-SA-25-C

13) DRIVEWAYS TO BE PERMEABLE PER PREVIOUSLY APPROVED CONCEPT PLAN.

14) PERMANENT EASEMENT / RIGHT OF ENTRY FROM KNOX COUNTY TO BE RECORDED FOR STORMWATER FACILITY ACCESS.

TYPICAL LOT LAYOUT
NO SCALE

GARRETT M. TUCKER
REGISTERED ENGINEER
AGRICULTURE
COMMERCE
NO. 104281
STATE OF TENNESSEE
10-15-25

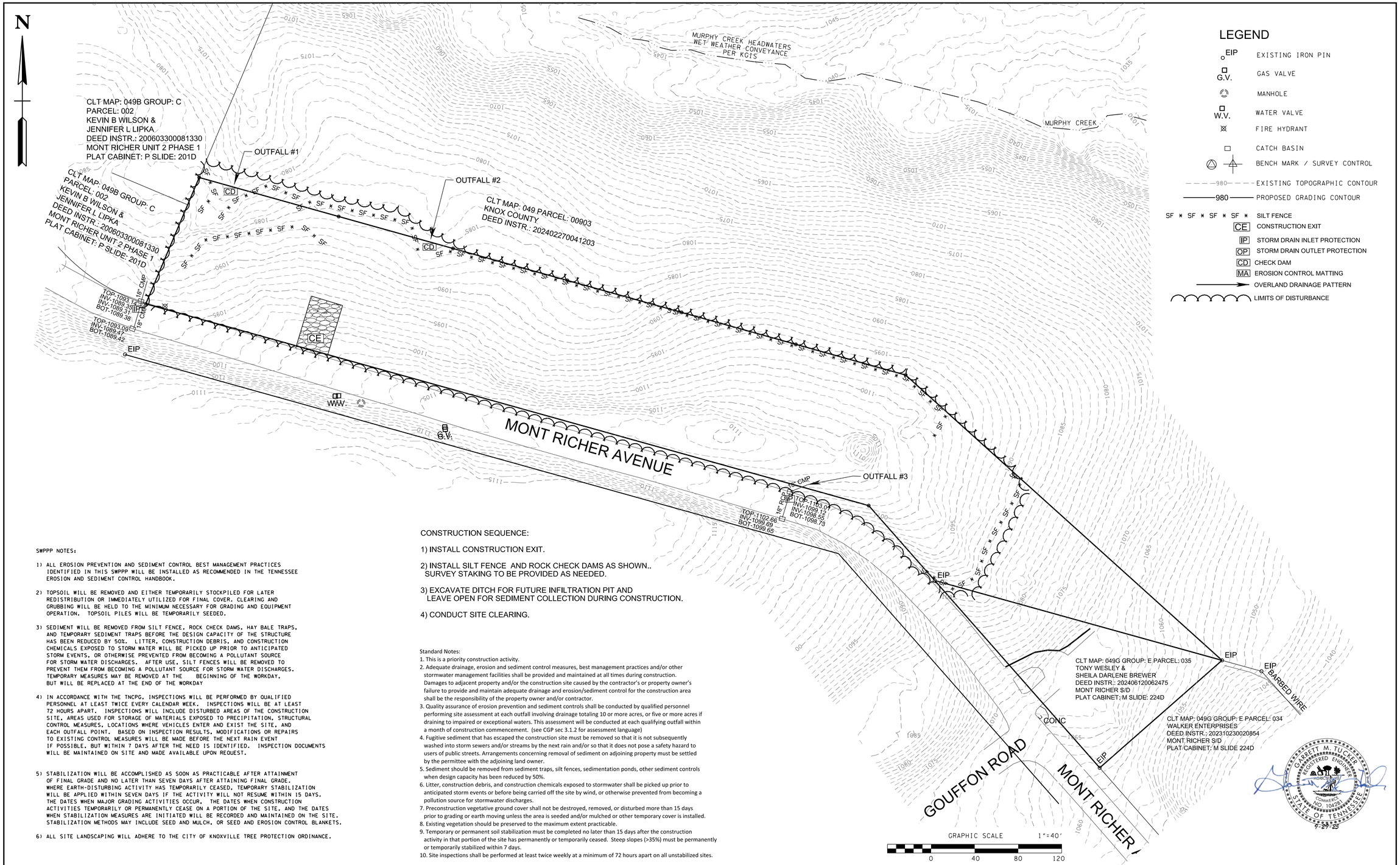
NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

USE ON REVIEW
GRADING & DRAINAGE PLAN

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	1" = 40'	C2
DRAWN BY	DATE	FILE NO.	
GMT	10-15-25	23077	



SWPPP NOTES:

1) ALL EROSION PREVENTION AND SEDIMENT CONTROL BEST MANAGEMENT PRACTICES IDENTIFIED IN THIS SWPPP WILL BE INSTALLED AS RECOMMENDED IN THE TENNESSEE EROSION AND SEDIMENT CONTROL HANDBOOK.

2) TOPSOIL WILL BE REMOVED AND EITHER TEMPORARILY STOCKPILED FOR LATER REDISTRIBUTION OR IMMEDIATELY UTILIZED FOR FINAL COVER. CLEARING AND GRUBBING WILL BE HELD TO THE MINIMUM NECESSARY FOR GRADING AND EQUIPMENT OPERATION. TOPSOIL PILES WILL BE TEMPORARILY SEEDED.

3) SEDIMENT WILL BE REMOVED FROM SILT FENCE, ROCK CHECK DAMS, HAY BALE TRAPS, AND TEMPORARY SEDIMENT TRAPS BEFORE THE DESIGN CAPACITY OF THE STRUCTURE HAS BEEN REDUCED BY 50%. LITTER, CONSTRUCTION DEBRIS, AND CONSTRUCTION CHEMICALS EXPOSED TO STORM WATER WILL BE PICKED UP PRIOR TO ANTICIPATED STORM EVENTS, OR OTHERWISE PREVENTED FROM BECOMING A POLLUTANT SOURCE FOR STORM WATER DISCHARGES. AFTER USE, SILT FENCES WILL BE REMOVED TO PREVENT THEM FROM BECOMING A POLLUTANT SOURCE FOR STORM WATER DISCHARGES. TEMPORARY MEASURES MAY BE REMOVED AT THE BEGINNING OF THE WORKDAY, BUT WILL BE REPLACED AT THE END OF THE WORKDAY

4) IN ACCORDANCE WITH THE TNCPG, INSPECTIONS WILL BE PERFORMED BY QUALIFIED PERSONNEL AT LEAST TWICE EVERY CALENDAR WEEK. INSPECTIONS WILL BE AT LEAST 72 HOURS APART. INSPECTIONS WILL INCLUDE DISTURBED AREAS OF THE CONSTRUCTION SITE, AREAS USED FOR STORAGE OF MATERIALS EXPOSED TO PRECIPITATION, STRUCTURAL CONTROL MEASURES, LOCATIONS WHERE VEHICLES ENTER AND EXIST THE SITE, AND EACH OUTFALL POINT. BASED ON INSPECTION RESULTS, MODIFICATIONS OR REPAIRS TO EXISTING CONTROL MEASURES WILL BE MADE BEFORE THE NEXT RAIN EVENT IF POSSIBLE, BUT WITHIN 7 DAYS AFTER THE NEED IS IDENTIFIED. INSPECTION DOCUMENTS WILL BE MAINTAINED ON SITE AND MADE AVAILABLE UPON REQUEST.

5) STABILIZATION WILL BE ACCOMPLISHED AS SOON AS PRACTICABLE AFTER ATTAINMENT OF FINAL GRADE AND NO LATER THAN SEVEN DAYS AFTER ATTAINING FINAL GRADE, WHERE EARTH-DISTURBING ACTIVITY HAS TEMPORARILY CEASED. TEMPORARY STABILIZATION WILL BE APPLIED WITHIN SEVEN DAYS IF THE ACTIVITY WILL NOT RESUME WITHIN 15 DAYS. THE DATES WHEN MAJOR GRADING ACTIVITIES OCCUR, THE DATES WHEN CONSTRUCTION ACTIVITIES TEMPORARILY OR PERMANENTLY CEASE ON A PORTION OF THE SITE, AND THE DATES WHEN STABILIZATION MEASURES ARE INITIATED WILL BE RECORDED AND MAINTAINED ON THE SITE. STABILIZATION METHODS MAY INCLUDE SEED AND MULCH, OR SEED AND EROSION CONTROL BLANKETS.

6) ALL SITE LANDSCAPING WILL ADHERE TO THE CITY OF KNOXVILLE TREE PROTECTION ORDINANCE.

CONSTRUCTION SEQUENCE:

1) INSTALL CONSTRUCTION EXIT.

2) INSTALL SILT FENCE AND ROCK CHECK DAMS AS SHOWN.. SURVEY STAKING TO BE PROVIDED AS NEEDED.

3) EXCAVATE DITCH FOR FUTURE INFILTRATION PIT AND LEAVE OPEN FOR SEDIMENT COLLECTION DURING CONSTRUCTION.

4) CONDUCT SITE CLEARING.

Standard Notes:
1. This is a priority construction activity.
2. Adequate drainage, erosion and sediment control measures, best management practices and/or other stormwater management facilities shall be provided and maintained at all times during construction. Damages to adjacent property and/or the construction site caused by the contractor's or property owner's failure to provide and maintain adequate drainage and erosion/sediment control for the construction area shall be the responsibility of the property owner and/or contractor.
3. Quality assurance of erosion prevention and sediment controls shall be conducted by qualified personnel performing site assessment at each outfall involving drainage totaling 10 or more acres, or five or more acres if draining to impaired or exceptional waters. This assessment will be conducted at each qualifying outfall within a month of construction commencement. (see CGP sec 3.1.2 for assessment language)
4. Fugitive sediment that has escaped the construction site must be removed so that it is not subsequently washed into storm sewers and/or streams by the next rain and/or so that it does not pose a safety hazard to users of public streets. Arrangements concerning removal of sediment on adjoining property must be settled by the permittee with the adjoining land owner.
5. Sediment should be removed from sediment traps, silt fences, sedimentation ponds, other sediment controls when design capacity has been reduced by 50%.
6. Litter, construction debris, and construction chemicals exposed to stormwater shall be picked up prior to anticipated storm events or before being carried off the site by wind, or otherwise prevented from becoming a pollution source for stormwater discharges.
7. Preconstruction vegetative ground cover shall not be destroyed, removed, or disturbed more than 15 days prior to grading or earth moving unless the area is seeded and/or mulched or other temporary cover is installed.
8. Existing vegetation should be preserved to the maximum extent practicable.
9. Temporary or permanent soil stabilization must be completed no later than 15 days after the construction activity in that portion of the site has permanently or temporarily ceased. Steep slopes (>35%) must be permanently or temporarily stabilized within 7 days.
10. Site inspections shall be performed at least twice weekly at a minimum of 72 hours apart on all unstabilized sites.

GARRETT M. TUCKER
REGISTERED ENGINEER
No. 104281
STATE OF TENNESSEE
9-29-25

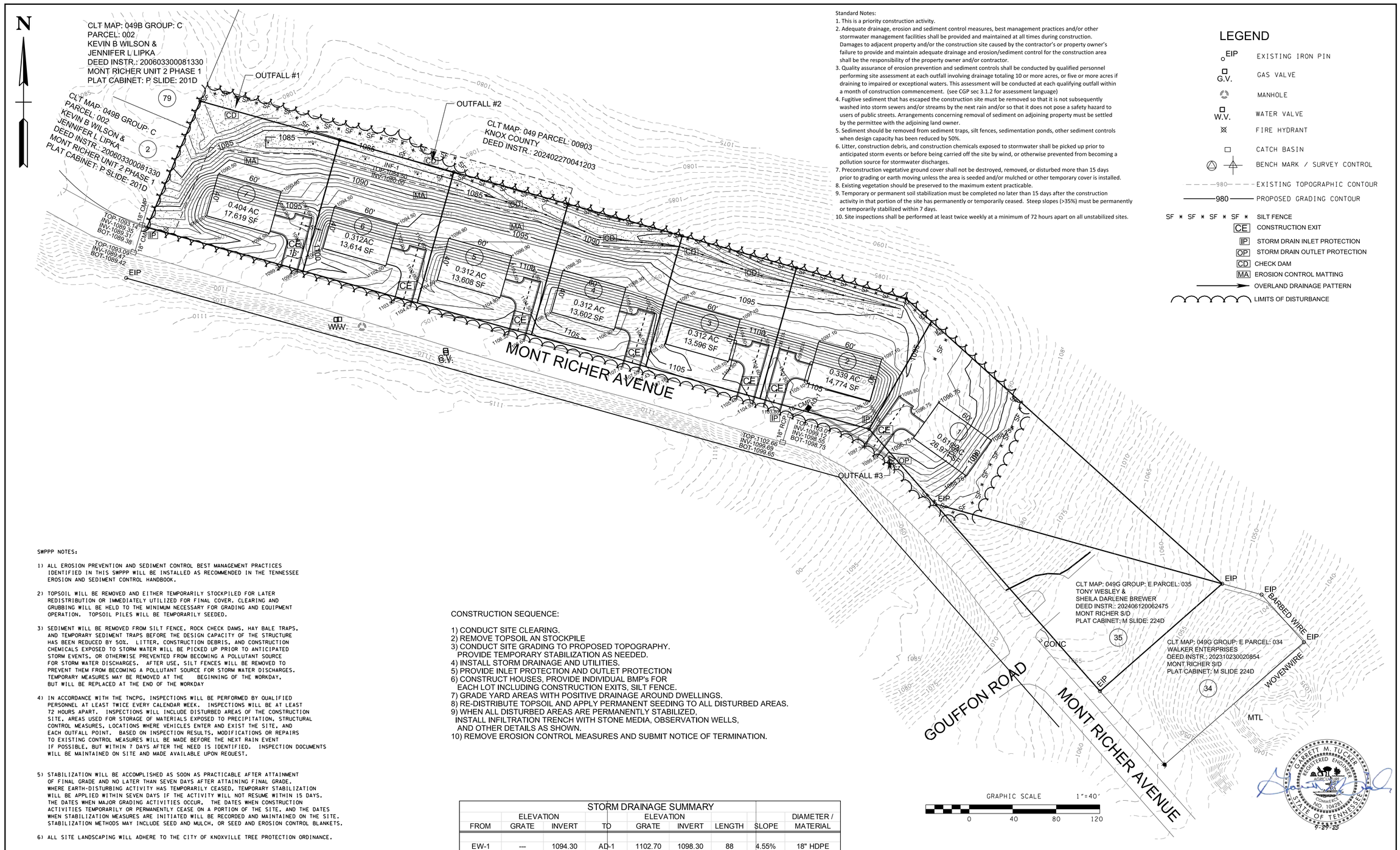
NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

STORMWATER POLLUTION PREVENTION PLAN (SWPPP) STAGE 1

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	1" = 40'	C3
DRAWN BY	DATE	FILE NO.	
GMT	9-29-25	23077	



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LEGEND

- EIP — EXISTING IRON PIN
- G.V. — GAS VALVE
- MANHOLE
- W.V. — WATER VALVE
- FIRE HYDRANT
- CATCH BASIN
- BENCH MARK / SURVEY CONTROL
- 980 — EXISTING TOPOGRAPHIC CONTOUR
- 980 — PROPOSED GRADING CONTOUR
- SF SF SF SF SF — SILT FENCE
- CE — CONSTRUCTION EXIT
- IP — STORM DRAIN INLET PROTECTION
- OP — STORM DRAIN OUTLET PROTECTION
- CD — CHECK DAM
- MA — EROSION CONTROL MATTING
- OVERLAND DRAINAGE PATTERN
- LIMITS OF DISTURBANCE

SWPPP NOTES:

1) ALL EROSION PREVENTION AND SEDIMENT CONTROL BEST MANAGEMENT PRACTICES IDENTIFIED IN THIS SWPPP WILL BE INSTALLED AS RECOMMENDED IN THE TENNESSEE EROSION AND SEDIMENT CONTROL HANDBOOK.

2) TOPSOIL WILL BE REMOVED AND EITHER TEMPORARILY STOCKPILED FOR LATER REDISTRIBUTION OR IMMEDIATELY UTILIZED FOR FINAL COVER. CLEARING AND GRUBBING WILL BE HELD TO THE MINIMUM NECESSARY FOR GRADING AND EQUIPMENT OPERATION. TOPSOIL PILES WILL BE TEMPORARILY SEEDED.

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6) ALL SITE LANDSCAPING WILL ADHERE TO THE CITY OF KNOXVILLE TREE PROTECTION ORDINANCE.

CONSTRUCTION SEQUENCE:

1) CONDUCT SITE CLEARING.
2) REMOVE TOPSOIL AN STOCKPILE
3) CONDUCT SITE GRADING TO PROPOSED TOPOGRAPHY.
   PROVIDE TEMPORARY STABILIZATION AS NEEDED.
4) INSTALL STORM DRAINAGE AND UTILITIES.
5) PROVIDE INLET PROTECTION AND OUTLET PROTECTION
6) CONSTRUCT HOUSES, PROVIDE INDIVIDUAL BMP's FOR
   EACH LOT INCLUDING CONSTRUCTION EXITS, SILT FENCE.
7) GRADE YARD AREAS WITH POSITIVE DRAINAGE AROUND DWELLINGS.
8) RE-DISTRIBUTE TOPSOIL AND APPLY PERMANENT SEEDING TO ALL DISTURBED AREAS.
9) WHEN ALL DISTURBED AREAS ARE PERMANENTLY STABILIZED,
   INSTALL INFILTRATION TRENCH WITH STONE MEDIA, OBSERVATION WELLS,
   AND OTHER DETAILS AS SHOWN.
10) REMOVE EROSION CONTROL MEASURES AND SUBMIT NOTICE OF TERMINATION.

STORM DRAINAGE SUMMARY

FROM	ELEVATION GRATE	ELEVATION INVERT	TO	ELEVATION GRATE	ELEVATION INVERT	LENGTH	SLOPE	DIAMETER / MATERIAL
EW-1	---	1094.30	AD-1	1102.70	1098.30	88	4.55%	18" HDPE

GARRETT M. TUCKER REGISTERED ENGINEER AGRICULTURE COMMERCE NO. 104291 STATE OF TENNESSEE 9-29-25

NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

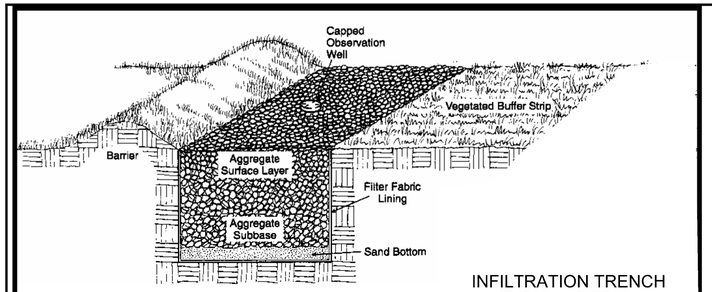
RGC&A

ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

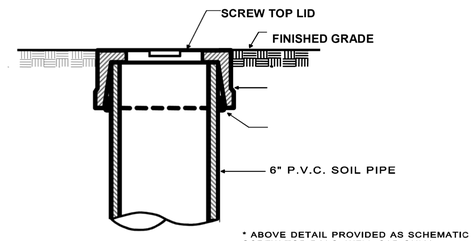
MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

STORMWATER POLLUTION PREVENTION PLAN (SWPPP) STAGE 2

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	1" = 40'	C4
DRAWN BY	DATE	FILE NO.	
GMT	9-29-25	23077	



INFILTRATION TRENCH
TYPICAL DETAIL
NO SCALE



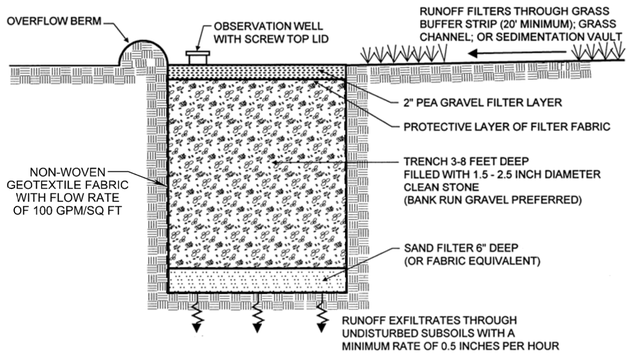
* ABOVE DETAIL PROVIDED AS SCHEMATIC
SCREW TOP P.V.C. WELL CAP ONLY

EACH OBSERVATION WELL / CLEANOUT SHALL INCLUDE THE FOLLOWING:

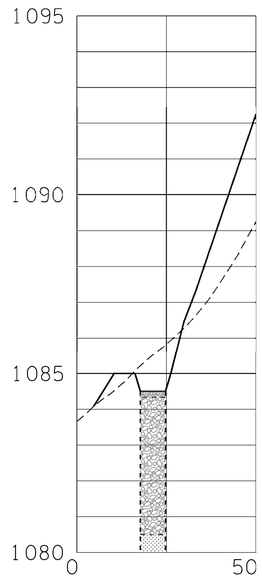
1. FOR AN UNDERGROUND FLUSH MOUNTED OBSERVATION WELL / CLEANOUT, PROVIDE A TUBE MADE OF NON-CORROSIVE MATERIAL, SCHEDULE 40 OR EQUAL, AT LEAST THREE FEET LONG WITH AN INSIDE DIAMETER OF AT LEAST 6 INCHES.

2. THE TUBE SHALL HAVE A FACTORY ATTACHED CAST IRON OR HIGH IMPACT PLASTIC COLLAR WITH RIBS TO PREVENT ROTATION WHEN REMOVING SCREW TOP LID. THE SCREW TOP LID SHALL BE CAST IRON OR HIGH IMPACT PLASTIC THAT WILL WITHSTAND ULTRA-VIOLET RAYS.

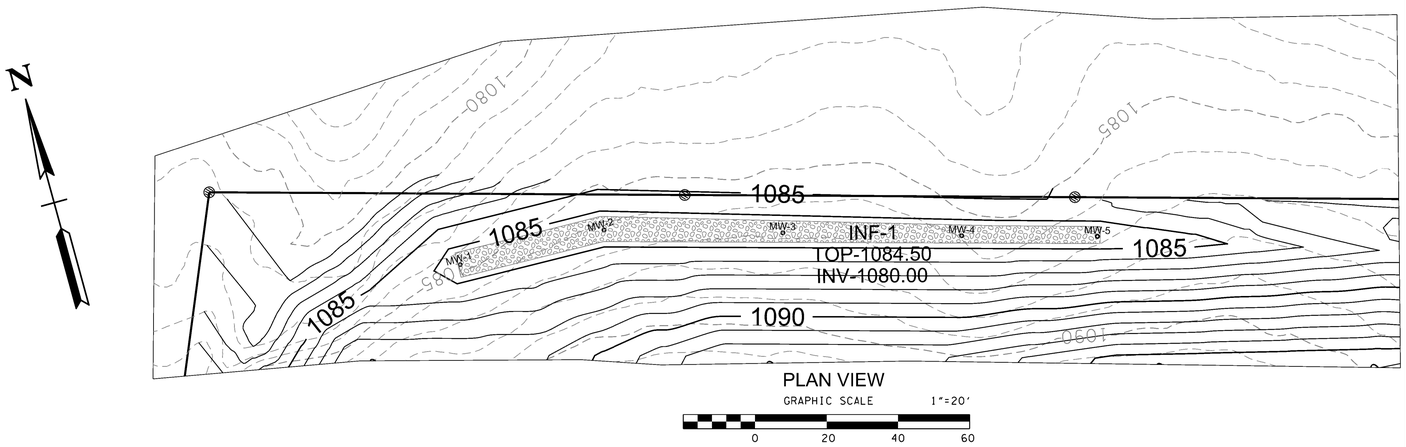
INFILTRATION TRENCH
MONITORING WELL DETAIL
NO SCALE



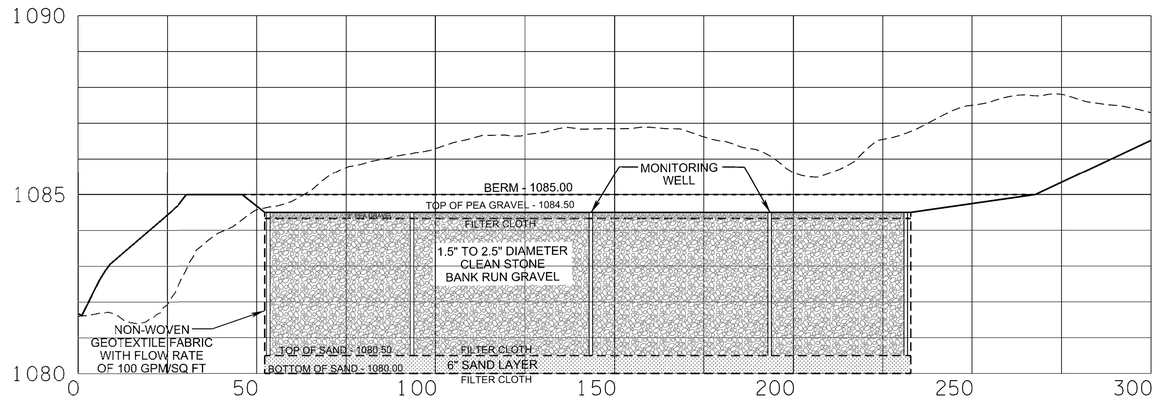
INFILTRATION TRENCH
TYPICAL CROSS-SECTION DETAIL
NO SCALE



INFILTRATION TRENCH
CROSS-SECTION DETAIL



PLAN VIEW
GRAPHIC SCALE 1"=20'
0 20 40 60



INFILTRATION TRENCH
PROFILE DETAIL

GARRETT M. TUCKER
REGISTERED ENGINEER
AGRICULTURE
COMMERCE
NO. 104781
STATE OF TENNESSEE
9-29-25

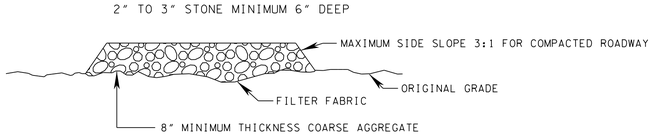
NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

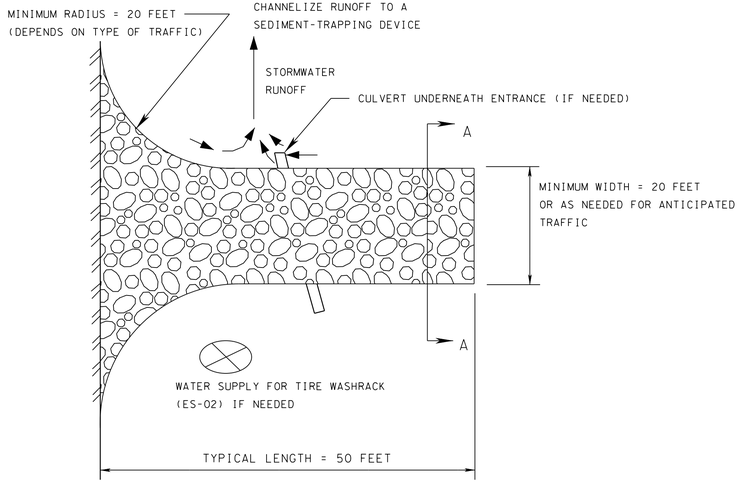
MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

DETENTION POND DETAILS

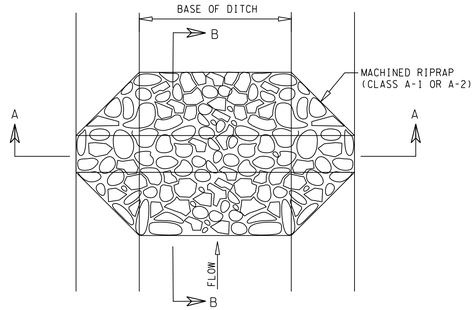
DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	AS SHOWN	C5
DRAWN BY	DATE	FILE NO.	
GMT	9-29-25	23077	



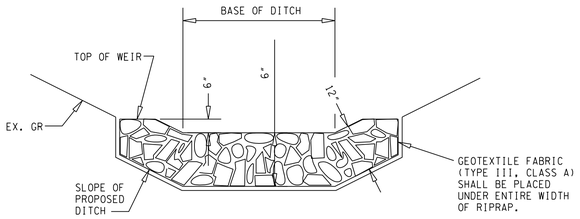
SECTION A-A



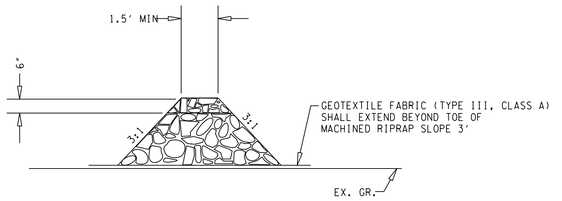
CONSTRUCTION EXIT DETAIL



PLAN



SECTION A-A

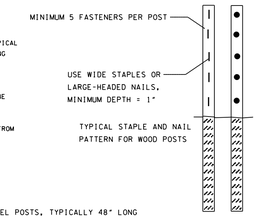


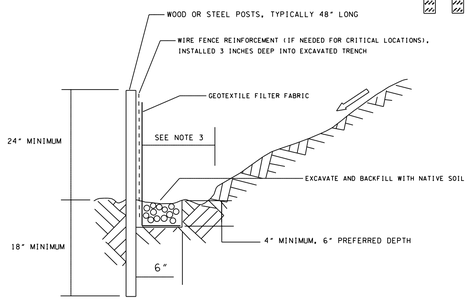
SECTION B-B

ROCK DAM DETAIL

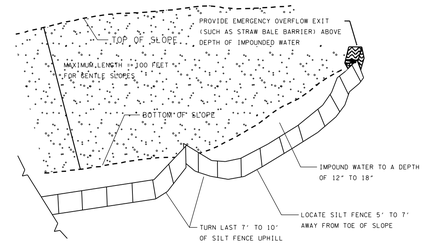
NOTES:

1. POST SPACING SHALL BE 8 FEET MAXIMUM FOR TYPICAL APPLICATIONS AT THE BOTTOM OF SLOPES OR ALONG SITE PERIMETER.
2. POST SPACING SHALL BE 6 FEET MAXIMUM AT THE BOTTOM OF STEEP SLOPES. POST SPACING SHALL BE 4 FEET MAXIMUM WITHIN A DRAINAGE CHANNEL.
3. PLACE SILT FENCE AT LEAST 5 TO 7 FEET AWAY FROM STEEP OR LONG SLOPES TO IMPOUND STORMWATER RUNOFF. SEE FIGURE ES-14-3.





TYPICAL SILT FENCE INSTALLATION



NOT TO SCALE

SILT FENCE (BELOW A STEEP OR LONG SLOPE)

GARRETT M. TUCKER
REGISTERED ENGINEER
AGRICULTURE
COMMERCIAL
NO. 104281
STATE OF TENNESSEE
9-29-25

GRASS-LINED CHANNEL

NO.	DATE	DESCRIPTION	BY	CKD.

REVISIONS

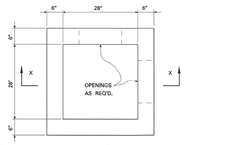
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

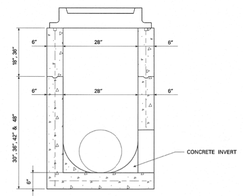
STORMWATER POLLUTION
PREVENTION PLAN (SWPPP)
STAGE 2

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	1" = 40'	C6
DRAWN BY	DATE	FILE NO.	
GMT	9-29-25	23077	

REVISIONS			
No.	DATE	BY	BRIEF DESCRIPTION
1	08-NOV-01	RLT	Addition of notes 7 and 8.
2	05-MAY-06	JHC	Addition of note 9.



PLAN



SECTION X-X

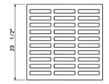
NOTES:
1. ALL CASTINGS SHALL CONFORM TO ASTM A48 CLASS 30.
2. ALL GRATES AND FRAMES SHALL BE APPROVED FOR HS-20 TRAFFIC LOADING.
3. EACH SECTION OF THE PRECAST STRUCTURE SHALL HAVE NOT MORE THAN THREE HOLES FOR THE PURPOSE OF HANDLING AND LAYING.
4. LIFTING DEVICE HOLES SHALL BE TAPERED AND PLUGGED WITH STOPPERS OR MORTARED AFTER INSTALLATION.
5. CONCRETE INVERTS SHALL BE CONSTRUCTED IN THE FIELD AS TO PROVIDE POSITIVE FLOW.
6. CASTINGS SHALL BE TREATED WITH TWO COATS OF BITUMINOUS PAINT.
7. MINIMUM CONCRETE STRENGTH 4,000 POUNDS PER SQUARE INCH.
8. STEEL REINFORCEMENT MINIMUM OF 0.14 SQUARE INCH PER SQUARE FOOT.
9. ENVIRONMENTAL STATEMENT SHALL BE PLACED ON ALL GRATES "NO DUMPING DRAINS TO RIVER" OR EQUIVILENT WITH A MINIMUM RAISED LETTER HEIGHT OF 1/2".

CITY OF KNOXVILLE DEPARTMENT OF ENGINEERING	DRAWN: MLR DATE: 06-NOV-01 CHECKED: RLT APPROVED: DPK
STANDARD DETAIL FOR AREA DRAIN	COK-1

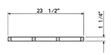
AREA DRAIN DETAIL
NO SCALE

FRAME AND GRATE CASTING

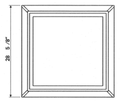
TYPE C



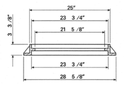
PLAN



CROSS SECTION

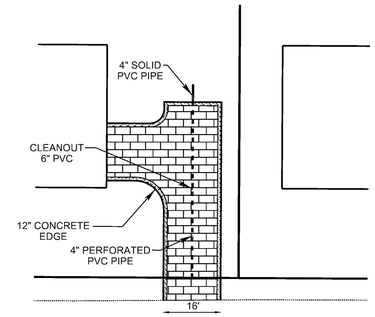


PLAN



CROSS SECTION

FRAME & GRATE
DETAILS
NO SCALE

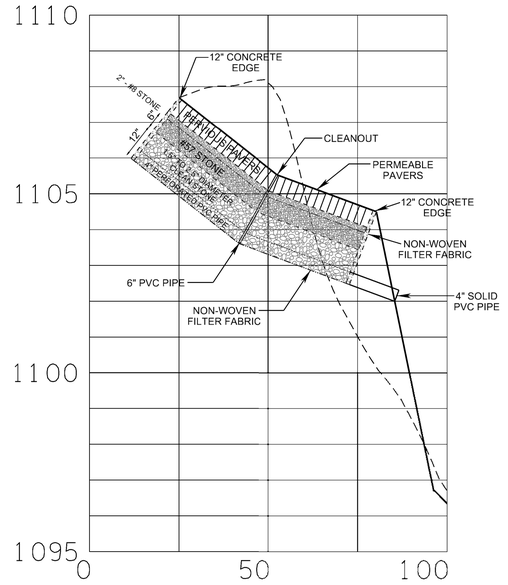


MONT RICHER AVENUE

PERMEABLE PAVEMENT DRIVEWAY
PLAN VIEW

GRAPHIC SCALE 1"=20'

0 20 40 60



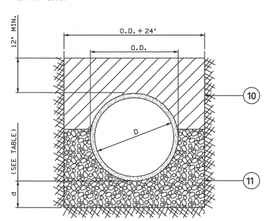
PERMEABLE PAVEMENT DRIVEWAY
PROFILE

GARRETT M. TUCKER
REGISTERED ENGINEER
COMMERCIAL
NO. 104781
STATE OF TENNESSEE
9-29-25

D	d (MIN.)
27" AND SMALLER	3"
30" TO 60"	4"
66" AND LARGER	6"
DEPTH OF BEDDING MATERIAL BELOW PIPE	

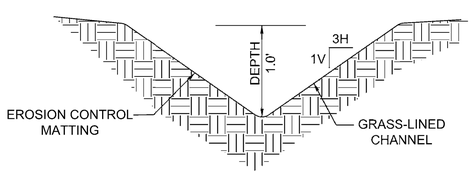
10. COMPACTED BACKFILL SHALL BE IN ACCORDANCE WITH SECTION 20.0. BACKFILL MATERIAL IN THE ROADWAY OR WITHIN FIVE (5) FEET OF THE ROADWAY, UNDER CURBS, GUTTERS, AND SIDEWALKS SHALL MEET THE REQUIREMENTS OF SECTION 5.0 (MINERAL AGGREGATE BASE).

11. BEDDING MATERIAL, GRADING SIZE NO. 57 OR NO. 67, SHALL BE IN ACCORDANCE WITH SECTION 20.0.

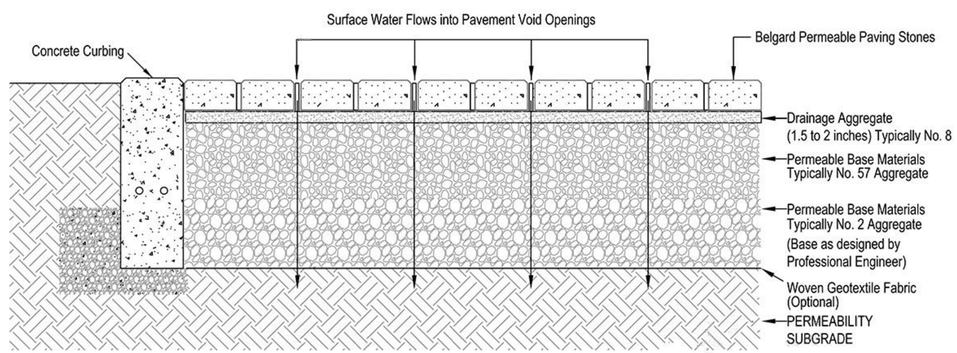


CLASS B

PIPE BEDDING DETAIL
NO SCALE



SWALE
TYPICAL DETAIL



PERMEABLE PAVEMENT
TYPICAL DETAIL
NO SCALE

NO.	DATE	DESCRIPTION	BY	CKD.

REVISIONS

RGC&A

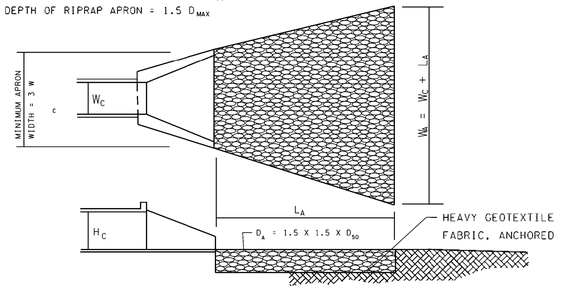
ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

DETAILS

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	AS SHOWN	C7
DRAWN BY	DATE	FILE NO.	
GMT	9-29-25	23077	

H_C = HEIGHT OF CULVERT
W_C = WIDTH OF CULVERT
L = LENGTH OF RIPRAP APRON
W_A = WIDTH OF RIPRAP APRON AT END
D_{50} = MEDIAN RIPRAP SIZE
D_{MAX} = MAXIMUM SIZE OF RIPRAP = 1.5 D_{50}
D_A = DEPTH OF RIPRAP APRON = 1.5 D_{MAX}



RIPRAP OUTLET PROTECTION

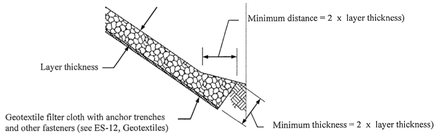
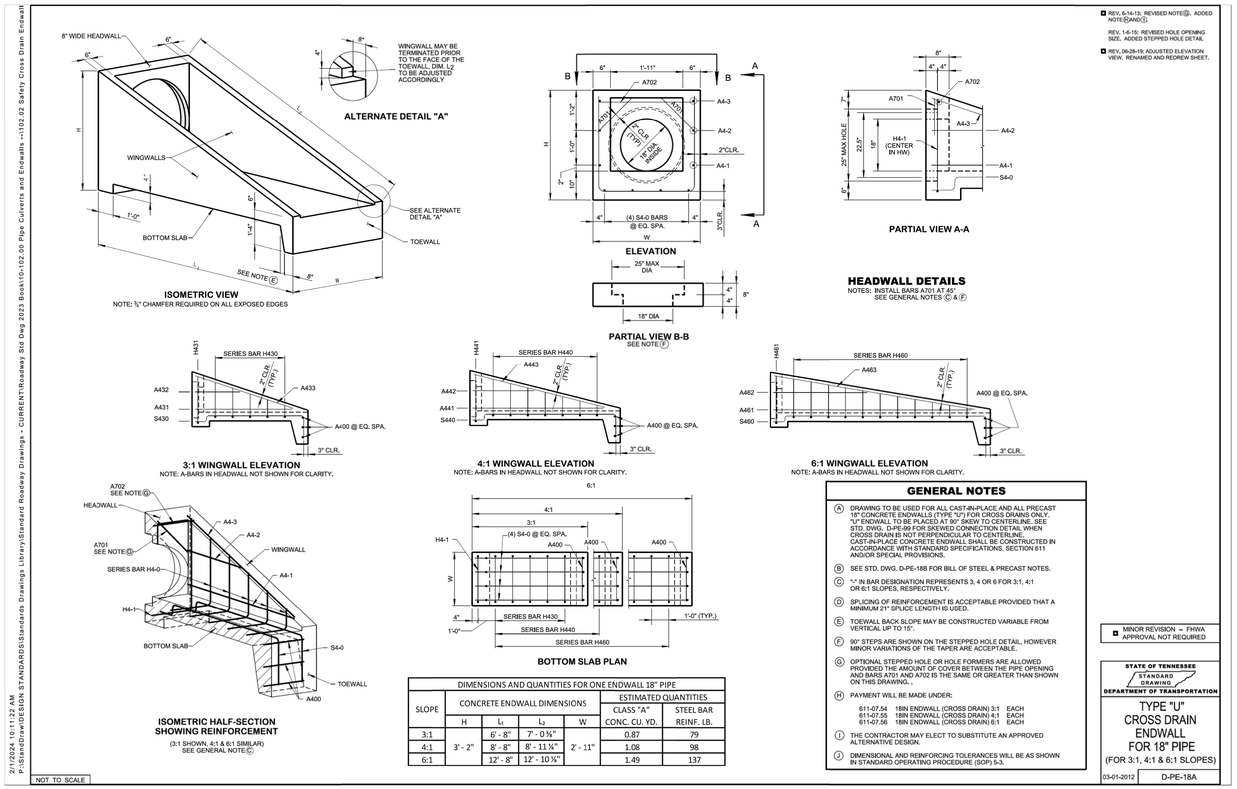


Figure ES-23-3
Base of Riprap Slope Protection

RIP-RAP SLOPE DETAIL
NO SCALE



SLOPE	CONCRETE ENDWALL DIMENSIONS				ESTIMATED QUANTITIES	
	H	L_1	L_2	W	CLASS "A" CONC. CU. YD.	STEEL BAR REINF. LB.
3:1	3' - 2"	6' - 8"	7' - 0 ¾"	2' - 11"	0.87	79
4:1		8' - 8"	8' - 11 ¾"		1.08	98
6:1		12' - 8"	12' - 10 ¾"		1.49	137

GENERAL NOTES

(A) DRAWING TO BE USED FOR ALL CAST-IN-PLACE AND ALL PRECAST 18" CONCRETE ENDWALLS (TYPE "U") FOR CROSS DRAINS ONLY. "U" ENDWALL TO BE PLACED AT 90° SKEW TO CENTERLINE. SEE STD. DWG. D-PE-99 FOR SKEWED CONNECTION DETAIL WHEN CROSS DRAIN IS NOT PERPENDICULAR TO CENTERLINE. CAST-IN-PLACE CONCRETE ENDWALL SHALL BE CONSTRUCTED IN ACCORDANCE WITH STANDARD SPECIFICATIONS, SECTION 611 AND/OR SPECIAL PROVISIONS.

(B) SEE STD. DWG. D-PE-18B FOR BILL OF STEEL & PRECAST NOTES.

(C) "-" IN BAR DESIGNATION REPRESENTS 3, 4 OR 6 FOR 3:1, 4:1 OR 6:1 SLOPES, RESPECTIVELY.

(D) SPLICING OF REINFORCEMENT IS ACCEPTABLE PROVIDED THAT A MINIMUM 21" SPLICE LENGTH IS USED.

(E) TOEWALL BACK SLOPE MAY BE CONSTRUCTED VARIABLE FROM VERTICAL UP TO 15°.

(F) 90° STEPS ARE SHOWN ON THE STEPPED HOLE DETAIL, HOWEVER MINOR VARIATIONS OF THE TAPER ARE ACCEPTABLE.

(G) OPTIONAL STEPPED HOLE OR HOLE FORMERS ARE ALLOWED PROVIDED THE AMOUNT OF COVER BETWEEN THE PIPE OPENING AND BARS A701 AND A702 IS THE SAME OR GREATER THAN SHOWN ON THIS DRAWING. .

(H) PAYMENT WILL BE MADE UNDER:

611-07.54	18IN ENDWALL (CROSS DRAIN) 3:1	EACH
611-07.55	18IN ENDWALL (CROSS DRAIN) 4:1	EACH
611-07.56	18IN ENDWALL (CROSS DRAIN) 6:1	EACH

(I) THE CONTRACTOR MAY ELECT TO SUBSTITUTE AN APPROVED ALTERNATIVE DESIGN.

(J) DIMENSIONAL AND REINFORCING TOLERANCES WILL BE AS SHOWN IN STANDARD OPERATING PROCEDURE (SOP) 5-3.

REV. 6-14-13: REVISED NOTE (B). ADDED NOTE (I)AND (J).
REV. 1-6-15: REVISED HOLE OPENING SIZE. ADDED STEPPED HOLE DETAIL.
REV. 09-28-16: ADJUSTED ELEVATION VIEW. RENAMED AND REDREW SHEET.

MINOR REVISION – FHWA APPROVAL NOT REQUIRED

STATE OF TENNESSEE
STANDARD DRAWING
DEPARTMENT OF TRANSPORTATION

TYPE "U"
CROSS DRAIN
ENDWALL
FOR 18" PIPE
(FOR 3:1, 4:1 & 6:1 SLOPES)

03-01-2012 | D-PE-18A

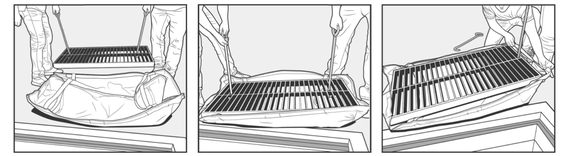
NOT TO SCALE

2/1/2024 10:11:22 AM
P:\Standrow\DESIGN STANDARDS\Standards Drawings Library\Standard Roadway Drawings - CURRENT\Roadway Std Dwg 2023 Book\105-102.00 Pipe Culverts and Endwalls -\105.02 Safety Cross Drain Endwall

ENDWALL DETAIL

PIG Sediment Drain Filter

Instructions



1. Open the sediment drain filter bag. Place the grate into the bag.
2. Nestle the corners of the grate into the double-walled corners of the bag.
3. Loop the lifting straps over the grate ends.
4. Check that both straps are over the grate ends and that grate corners are nestled into the double-walled corners.
5. Lift grate by the lifting straps.
6. Drop grate into the drain hole and tuck the straps into the grate.

Maintenance

Remove sediment and debris from around the filter after each storm event.
Check the filter bag at regular intervals and after storm events. Empty the bag if it is over ⅓ full of sediment.
To empty, use the straps to easily lift the drain filter bag and grate out of the inlet.
Replace additional absorbents when they're near full saturation.

New Pig
One Pork Avenue
Tipton, PA 16684-0304

newpig.com
North America: 1-800-468-4647
Europe: +31 (0)76 596 92 50
China: +86-21-400 921 5178
UK: 0800 919 900
Outside North America: +1-814-684-0101

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502947 / 361487

STORM DRAIN
INLET PROTECTION

GARRETT M. TUCKER
REGISTERED ENGINEER
COMMISSION NO. 104291
STATE OF TENNESSEE
9-29-25

NO.	DATE	DESCRIPTION	BY	CKD.
		REVISIONS		

ROBERT G. CAMPBELL & ASSOC., L.P.
CONSULTING ENGINEERS
KNOXVILLE, TENNESSEE

MONT RICHER - UNIT 3
SITE DEVELOPMENT PLAN

DETAILS

DESIGNED BY	CHECKED BY	SCALE	SHEET NO.
GMT	RGC	NO SCALE	C8
DRAWN BY	DATE	FILE NO.	
GMT	9-29-25	23077	

RLA-18176 **R-26-3-703**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Katie Huneycutt, PARKS AND RECREATION
Department:	PARKS AND RECREATION
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, authorizing the acceptance of a donation to Knox County Parks and Recreation from Jake Mynatt, President of Halls Community Park, Inc., for the installation of French drains around the batting cages at Gibbs Ruritan Park.
(Parks and Recreation)

Attachments

Resolution
Donation to Gibbs Ruritan Park

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, AUTHORIZING THE ACCEPTANCE OF A DONATION TO KNOX COUNTY PARKS AND RECREATION FROM JAKE MYNATT, PRESIDENT OF HALLS COMMUNITY PARK, INC., FOR THE INSTALLATION OF FRENCH DRAINS AROUND THE BATTING CAGES AT GIBBS RURITAN PARK.

RESOLUTION: **R-26-3-703**

REQUESTED BY: **PARKS & RECREATION**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County Parks and Recreation has received a donation from Jake Mynatt, President of Halls Community Park, Inc., for the installation of French drains around the batting cages at Gibbs Ruritan Park; and

WHEREAS, Knox County Parks and Recreation desires to accept this donation from Jake Mynatt, President of Halls Community Park, Inc., as further detailed in the attached Donation Form.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Commission of Knox County hereby authorizes the acceptance of a donation to Knox County Parks and Recreation from Jake Mynatt, President of Halls Community Park, Inc. for the installation of French drains around the batting cages at Gibbs Ruritan Park. A copy of the Knox County Parks and Recreation Donation Form is attached hereto and incorporated herein by reference.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Parks: Donation Form

Contact Information

Date	Thursday, January 8, 2026
Business/Organization/Sponsor Name	Halls Community Park, Inc.
Contact Name and Title	Jake Mynatt- President
Address	6900 Recreation Lane Knoxville, Tennessee, 37918
Email	jake.mynatt@gmail.com
Phone	(865) 621-1132
Tax ID/SSN	26-1900898

Donation Information

Donor Estimate of Current Value of Donation (Fair Market Value)	5,000
Type of Donation	Land/Goods/Services
If land, goods, or services are your donation - describe the donation and provide serial or VIN number	French Drains being installed around the batting cages.
No goods or services were provided in exchange, in whole or in part, for the donation	True
This donation is to be used at Knox County's discretion	True
Will there be any potential, immediate, or initial acquisition or installation costs or ongoing maintenance or replacement costs?	No
I understand that submission of this form does not guarantee acceptance of donation and once approved by Senior Director of Knox County Parks and Recreation donation will be presented to Knox County Commission for final approval.	True
Signature of Donor	Jake Mynatt

For Internal Use:

Approved: ☑ Denied: ☐

Date: Jan 9, 2026

Signature: Joseph D Mack

Senior Director

Gibbs Updates -01-08-2026

Final Audit Report 2026-01-09

Created:	2026-01-09
By:	Anna Roeder (anna.roeder@knoxcounty.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAAAIVSCXbQVxpxdwBvrwuenmiFtPhM4IVu

"Gibbs Updates -01-08-2026" History

Document created by Anna Roeder (anna.roeder@knoxcounty.org)
2026-01-09 - 4:47:00 PM GMT- IP address: 66.97.177.135

Document emailed to Joe Mack (joseph.mack@knoxcounty.org) for signature
2026-01-09 - 4:47:46 PM GMT

Email viewed by Joe Mack (joseph.mack@knoxcounty.org)
2026-01-09 - 4:54:03 PM GMT- IP address: 66.97.177.140

Document e-signed by Joe Mack (joseph.mack@knoxcounty.org)
Signature Date: 2026-01-09 - 4:54:34 PM GMT - Time Source: server- IP address: 66.97.177.140

Agreement completed.
2026-01-09 - 4:54:34 PM GMT

RLA-18177 **R-26-3-704**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Katie Huneycutt, PARKS AND RECREATION
Department:	PARKS AND RECREATION
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, authorizing the acceptance of a donation of a memorial plaque from the Tennessee Federation of Garden Clubs, Inc., District IV, to Knox County Parks and Recreation.
(Parks and Recreation)

Attachments

Resolution

French Broad Veteran's Park Donation

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, AUTHORIZING THE ACCEPTANCE OF A DONATION OF A MEMORIAL PLAQUE FROM THE TENNESSEE FEDERATION OF GARDEN CLUBS, INC., DISTRICT IV, TO KNOX COUNTY PARKS AND RECREATION.

RESOLUTION: **R-26-3-704**

REQUESTED BY: **PARKS & RECREATION**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County Parks and Recreation has received a donation of a memorial plaque from the Tennessee Federation of Garden Clubs, Inc., District IV; and

WHEREAS, Knox County Parks and Recreation desires to accept this memorial plaque donation for placement at French Broad Veterans Memorial Park, as further detailed in the attached Donation Form.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Commission of Knox County hereby authorizes the acceptance of a donation of a memorial plaque from the Tennessee Federation of Garden Clubs, Inc., District IV, to Knox County Parks and Recreation. A copy of the Knox County Parks and Recreation Donation Form is attached hereto and incorporated herein by reference.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Friday, January 9, 2026

Parks: Donation Form

Contact Information

Date	Friday, January 9, 2026
Business/Organization/Sponsor Name	Tennessee Federation of Garden Clubs, Inc. District IV
Contact Name and Title	Janie Bitner, TFGC, Inc. District IV Blue Star/Gold Star Families Memorial Marker Chairman
Address	12905 Butterfield Lane Knoxville, TN, 37934-4401
Email	janie.bitner@live.com
Phone	(865) 474-0882
Tax ID/SSN	408-84-3114

Donation Information

Donor Estimate of Current Value of Donation (Fair Market Value)
$2,400.00

Type of Donation
Memorial

Type of Memorial
French Broad Veteran Memorial Donation

Type of Veteran Memorial Donation. (Please note this type of donation is subject to veteran verification through Knox County Veterans Memorial Subcommittee)
Plaque

Provide a short description of the parameters of your donation. Name the desired location of the donation and the dimensions of the donation. If the donation is a tree, name the desired species.

Tennessee Federation of Garden Clubs, Inc. District IV would like to donate a
Gold Star Families Memorial Marker produced by Sewah Studios located in Marietta, Ohio. This marker is cast aluminum with a 7-foot post. This Gold Star Families Memorial Marker is manufactured by the same company that did the Blue Star Marker dedicated by our organization at French Broad Veterans Memorial Park in 2024.

Memorial Dedication (Trees have a word limit of 25; Benches and Picnic Tables have a word limit of 36).

Gold Star Families Memorial Marker Dedication Ceremony hopefully in May or June of 2026. Tennessee Federation of Garden Clubs, Inc. District IV will be on hand to assist with ceremony.

Memorial Dedicated by
Tennessee Federation of Garden Clubs, Inc. District IV

No goods or services were provided in exchange, in whole or in part, for the donation
True

This donation is to be used at Knox County's discretion
True

Will there be any potential, immediate, or initial acquisition or installation costs or ongoing maintenance or replacement costs?
No

Additional Remarks

Photos and additional information on previous Tennessee Federation of Garden Clubs, Inc. District IV Gold Star Families Memorial Marker dedications can be provided. Thank you for the opportunity to work with you and to honor our fallen heroes.

I understand that submission of this form does not guarantee acceptance of donation and once approved by Senior Director of Knox County Parks and Recreation donation will be presented to Knox County Commission for final approval.	True
Signature of Donor	Janie BITNER

For Internal Use:

Approved: ☐ Denied: ☐

Date: _____

Signature: _____

Senior Director

RLA-18178 **R-26-3-705**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Katie Huneycutt, PARKS AND RECREATION
Department:	PARKS AND RECREATION
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	YES

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Contract with TinyMobileRobots and a Lease Agreement with First Western Equipment Finance for Robotic Line Marking Solutions for Knox County sports fields.
(Parks and Recreation)

Attachments

Resolution

Contract - TinyMobileRobots

First Western - Municipal Lease Agreement

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A CONTRACT WITH TINYMOBILEROBOTS AND A LEASE AGREEMENT WITH FIRST WESTERN EQUIPMENT FINANCE FOR ROBOTIC LINE MARKING SOLUTIONS FOR KNOX COUNTY SPORTS FIELDS.

RESOLUTION: **R-26-3-705**

REQUESTED BY: **PARKS AND RECREATION**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County desires to enter into a contract with TinyMobileRobots through The Interlocal Purchasing System (TIPS) Contract #250106 for Robotic Line Marking Solutions for Knox County sports fields (the "Contract"); and

WHEREAS, Knox County also desires to enter into Lease Agreement with First Western Equipment Finance for the lease of the equipment acquired through TinyMobileRobots (the "Lease Agreement"); and

WHEREAS, the Contract and Lease Agreement set forth the terms and conditions under which the equipment will be leased by Knox County for a term of six (6) years, or seventy-two (72) months.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Contract with TinyMobileRobots and Lease Agreement with First Western Equipment Finance for Robotic Line Marking Solutions for Knox County sports fields are hereby adopted and approved in substantive form as presented this date, copies of which are attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Contract with TinyMobileRobots and Lease Agreement with First Western Equipment Finance for Robotic Line Marking Solutions for Knox County sports fields shall be executed subject to such amendment or action not affecting the substantive provisions of the agreements as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Knox County Government

and

TinyMobileRobots

This Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and First Western Equipment Finance, hereinafter referred to as "Contractor".

Whereas, the County desires to enter into a lease agreement with TinyMobileRobots through The Interlocal Purchasing System (TIPS) Contract #250106 for Robotic Line Marking Solutions and;

Whereas, Contractor agrees and undertakes to provide said services for the County, as set forth in this Agreement, and at the price quoted for said services by Contractor. Further, in accordance with the lawful directions of the County, the Contractor agrees in all respects, to be governed by this Contract;

Whereas, Contractor utilizes First Western Equipment Finance for leasing services.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to enter into this Contract to set forth their respective rights and obligations and do mutually agree that;

Witnesseth:

1. **Terms of this Contract.** This Contract commences on the date last written below unless terminated in conformity with the terms of this Contract as contained in paragraphs 4 and 5. The County intends to issue a six (6) year, (72-month) lease The County reserves the right to revoke the award if a pattern of unavailability arises with the vendor.

2. **Payment.** The County shall pay Contractor the amount as agreed upon in the quote with payments being made to First Western Equipment Finance; pursuant to all payments being subject to the County's review and approval. The Contractor shall receive, upon the need of the County, written notification to proceed. The Contractor shall pursue all work diligently until completion as directed by the County.

Knox County requires a minimum of thirty (30) days to process invoices for payment after receipt of a properly submitted invoice. Knox County shall review all invoices for adherence to the terms and conditions of the Contract. Variations from the Contract and Contract pricing are strictly prohibited. Any variations found on the invoice will result in the rejection of those invoices. Rejected invoices will be returned to the Contractor(s) for correction. If a discount for prompt payment is offered, the timeline does not commence until Knox County receives a correct invoice.

The County will not be liable for any additional fees associated with this Agreement, including, but not limited to, late fees or penalties, attorney fees, etc.

3. **Invoicing and reporting requirements.** Contractor shall invoice the County for services pursuant to this Agreement.

4. **Termination.** The County may terminate this Contract with or without cause, upon written notice of not less than thirty (30) days. Upon termination, the County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of the County.

Should the Contractor fail to provide the Services detailed herein, the County will communicate the problem(s) to the Contractor both verbally and in writing and keep a written record as to what the problem(s) are and when the Contractor was contacted. The Contractor shall rectify the problem within the time frame established by Tennessee State Law. If the same or other problems persist or reoccur, the County may terminate the Contract.

In the event Contractor intends to interrupt or discontinue service under this Contract, Contractor agrees to give the County at least 120 days advance written notice of said interruption or discontinuance of service prior to interrupting or discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

5. **Appropriations.** In the event no funds are appropriated by the County for the Robotic Line Marking Solutions in any fiscal year or insufficient funds exist to provide the services, then the Contract shall expire upon the expenditure of previously appropriated funds or the end of the current fiscal year, whichever occurs first, with no further obligations owed to or by either party.

6. **Independent contractor.** Contractor acknowledges that Contractor and employees serve as independent contractors and that the County shall not be in any manner responsible for any payment, insurance, or incurred liability.

7. **Compliance with all federal, state, and municipal laws.** Contractor is assumed to be familiar with and agrees to observe and comply with all federal, state, and local laws, statutes, ordinances, and regulations in any manner affecting the provision of the Contract.

8. **Severability clause.** If any provision of this Contract is declared illegal, void, or unenforceable the remaining provisions shall not be affected but shall remain in force and in effect.

9. **Prohibition against assignment.** Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft an "Assignment of Contract" document. Any assignment without such express written permission of may result in the automatic termination of this Agreement.

10. **This Contract** shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

11. **Right to inspect.** The County reserves the right to make periodic inspections of the manner and means the services are performed.

12. **Nondiscrimination and non-conflict statements.** Contractor agrees that no person on the grounds of handicap, age, race, color, religion, sex, national origin, or any individual trait or characteristic found to be an illegal consideration shall be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract, or in the employment practices of Contractor. Contractor shall, upon request, show proof of such non-discrimination, and shall post in conspicuous places available to all employees and applicants notices of non-discrimination.

13. **Books and records.** Contractor shall maintain all books, documents, accounting records and other evidence pertaining to the service under this Contract and make such materials available at their offices at all reasonable times during the contract period and for three (3) years from the date of the final payment under the Contract for inspection by the County or by any other governmental entity or agency participating in the funding of this Contract, or any authorized agents thereof; copies of said records to be furnished if requested. Such records shall not include those books, documents and accounting records that represent the Contractor's costs of manufacturing, acquiring or delivering the products and services governed by this Contract.

14. **Contractor** shall indemnify, defend, save and hold harmless, County, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the Contract by Contractor, its subcontractors, agents or employees or due to any negligent act, occurrence, omission, commission of Contractor, its subcontractors, agents, or employees.

15. **Delivery.** Contractor shall render the services in accordance with this Agreement.

16. **Tax Compliance.** Pursuant to Resolution R-07-1-903 passed by the Commission of Knox County, Tennessee, Contractor hereby acknowledges, by submission of its bid and signature that it is current in its respective Federal, State, County, and City taxes of whatever kind or nature and is not delinquent in any way. Delinquent status must be disclosed or risk debarment by the Knox County Purchasing Division.

17. **Limitations of liability.** No provision of this Agreement shall act or be deemed to be a waiver by Knox County of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq.

18. **Return of Equipment.** The County will not be responsible for the return of the equipment to the Contractor. It will be the responsibility of Contractor to pick up the equipment from the County at the end of the lease and return to the leasing agent or other designated location. The County will not be responsible for any fees associated with the return of the equipment, including, but not limited to shipping fees, penalties for failure to deliver equipment to designated destination, etc.

19. **Contract documents.** It is mutually agreed by both parties that the following documents are made part of this Contract and are incorporated herein by reference:

A. Contractor's Quote
B. Contractor's Terms and Conditions
C. End User Licensing Agreement
D. TIPS Contract 250106
E. Lease Agreement #14123801

It is agreed that this Contract, represents the **entire Contract** between the parties and no prior representations, promises, and agreements, oral or otherwise, not embodied herein, shall be of any force or effect. Any conflict between this Contract and the Contract documents shall be controlled by this Contract.

In witness whereof, the parties hereto have caused this Contract to be executed in one original copy on the day and year last written below.

KNOX COUNTY GOVERNMENT

_____ GLENN JACOBS
MAYOR – Signature **MAYOR**

Date:_____

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO. 26-114 **KNOX COUNTY, TENNESSEE**
APPROVED AS TO LEGAL FORM



_____ _____
LAW DIRECTOR – Signature **LAW DIRECTOR – Printed Name**

Date:_____

VENDOR

_____ _____
AUTHORIZED SIGNATURE **VENDOR – Printed Name**

FIRST WESTERN EQUIPMENT FINANCE
COMPANY NAME (VENDOR)

Date:_____

KNOX COUNTY PROCUREMENT DIVISION
IRAN DIVESTMENT ACT/NO BOYCOTT OF ISRAEL

By signing this Contract, each Contractor and each person signing on behalf of any Contractor certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each Contractor is not on the list created pursuant to Tennessee Code Annotated § 12-12-106.

Authorizing Signature: _____

(sign in blue ink)

Title: _____ Date: _____

Pursuant to Tennessee Code Annotated Title 12, Chapter 4, Part 1, by signing this Contract, each Contractor and each person signing on behalf of any Contractor certifies, and in the case of a joint response each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each Contractor is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel.

Authorizing Signature: _____

(sign in blue ink)

Title: _____ Date: _____

TINY MOBILE ROBOTS

KNOX COUNTY

#20260129-132003539

Issued
January 29, 2026

Expires
March 30, 2026

TinyMobileRobots
1634 Cobb International Blvd NW

Kennesaw, Georgia 30152
United States

Hayden Ariaz
har@tinymobilerobots.com

Prepared for

Knox County
400 Main Street
Knoxville, Tennessee 37902
United States

Jay Garrison
jay.garrison@knoxcounty.org

Joseph Mack
Director
joseph.mack@knoxcounty.org

Cain Clifton
Sr Sports Operations Manager
cain.clifton@knoxcounty.org

Products & Services	Item #	Quantity	Unit price	Price
TLM Pro X Razor	100-1155-21-USAIR	5	$39,995.00	$199,975.00
Custom Designs Template	110-1017-01-AUQG	5	$0.00	$0.00
Installation, Configuration, & Training Fee	120-1036-01	1	$1,995.00	$1,995.00
6 Years TinyConnectivity RTK, Cellular, Live Support, Cloud Software Updates, Back-Up & Security	120-1062-01-USAIR	5	$11,940.00	$59,700.00
RTS $2,000 One-Time-Purchase Package	610-1013-01-USPP	6	$2,000.00	$12,000.00

Products & Services	Item #	Quantity	Unit price	Price
22 Jug (2.5 Gallon per Jug) Ready-to-Spray Paint, one-time purchase				
One-time subtotal				$273,670.00
CRR Discount				($84,975.00)
Free Year 1 Courtesy Paint				($2,000.00)
Total				**$186,695.00**
Total contract value				**$186,695.00**

Comments

TIPS | TinyMobileRobots US
- Vendor Number: 11860
- Contract Number: 250106 - Technology Solutions Products and Services

Lease Offer | 6-years

$37,385.67*/year*

- Signed agreement performed through First Western Municipal Leasing Program.
- $1.00 purchase option at end of 6-year lease period.
- The contract includes non-appropriation language that allows the customer to return equipment if funds are not appropriated in the following year's budgets.
-The estimated offer does not include taxes or fees.

Shipping & Billing Information

***Please review the information below. If updates are needed, please complete the form below.**

Tax Exempt Status: Tax Exempt - Attach Form to Signed Quote

Public or Private: Public

Liftgate Requirements:

Billing Information
Contact Name:
Contact Phone Number:
Contact Email:
Billing Address: ,

Shipping Information
Contact Name:
Contact Phone Number:
Contact Email:
Shipping Address: ,

Warranty

To view TinyMobileRobots' Warranty Policy, please refer to this link.

Terms & Conditions

To view TinyMobileRobots' Terms & Conditions, please refer to this link.

End User License Agreement

To view TinyMobileRobots' End User License Agreement, please refer to this link.

W-9

To view TinyMobileRobots' W-9, please refer to this link.

Return Guarantee

To view TinyMobileRobots' Return Guarantee, please refer to this link.

Signature

Before you sign this quote, an email must be sent to you to verify your identity. Find your profile below to request a verification email.

Joseph Mack
joseph.mack@knoxcounty.org

Sign to Purchase

Seller:
TinyMobileRobots US LLC
1634 Cobb International Blvd NW
Kennesaw, GA 30152
United States
Phone: +1 (404) 595-1145

1. APPLICABILITY

The Buyer may place orders ("Order(s)") with the Seller for the Seller's products, and all such Orders shall be governed solely by these Terms and Conditions (this "Agreement"), unless otherwise expressly agreed in a written instrument signed by an authorized representative of the Seller.

Any oral understandings or verbal commitments are excluded.

The Seller shall not be deemed to have accepted or waived any contrary terms contained in Buyer's purchase orders, order forms, or other documents, and all such Buyer terms are hereby expressly rejected unless the Seller expressly agrees to them in writing.

The Seller reserves the right to reject any Order submitted by the Buyer.

2. DELIVERY

Delivery shall be made in accordance with either:

1. the delivery time specified in the Buyer's Order, or
2. the Seller's quoted lead time and monthly delivery rate,
   whichever is later.

DESTINATION AND DELIVERY: Transportation of all software, equipment, supplies and any other item that must be transported so that Contractor may furnish the Work, shall be **FOB Destination Freight Prepaid and Allowed**. Freight, handling, hazardous material charges, taxes, and distribution and installation charges shall be included in the total price of each item. Any additional charges will not be honored for payment unless authorized in writing by the County. If a party other than Contractor ships materials against this Contract, the shipper shall be instructed to show the purchase order number on all packages and shipping manifests to ensure proper identification and payment. A complete packing list shall accompany each shipment.

The title to goods passes to County only upon receipt at the correct delivery location. The County does not accept any shipments Freight Collect. Notwithstanding any provision hereof to the contrary, title to, and risk of loss or damage of, goods shall remain with Contractor until the goods are delivered at the F.O.B. point specified by the County.

The Seller may make early, accelerated, or partial shipments at its sole discretion.

3. INSPECTION

Buyer shall inspect Products immediately upon taking custody.

If Products do not conform to the Seller's drawings or specifications, Buyer must notify Seller of the nonconformance and provide Seller a reasonable opportunity to correct it.

If the Seller does not receive written notice of nonconformance within **fifteen (15) business days** after Buyer takes custody, the Products shall be deemed accepted and the Buyer shall be

deemed to have waived any related claims.

Unless explicitly agreed in writing, the Buyer shall have no right to inspect Products at the Seller's facilities. If inspection at the Seller's facility is mutually agreed, such inspection:

- must occur upon reasonable prior notice,
- must not interfere with Seller's operations, and
- may not include entry into proprietary or competition-sensitive areas.

~~4. CHANGES~~

~~The Seller may at any time make changes, improvements, or additions to the Products without any obligation to:~~

- ~~notify the Buyer,~~
- ~~retrofit previously delivered Products, or~~
- ~~incorporate such changes into Products already manufactured, shipped, or delivered.~~

~~The Seller shall bear no liability to the Buyer arising from such changes.~~

5. RISK OF LOSS AND TITLE

Risk of Loss.
Risk of loss or damage to the Products remains with the Seller until the Products are delivered to the Buyer or the Buyer's designated recipient at the delivery location specified in the applicable Order or Quote. Upon delivery, risk of loss transfers to the Buyer.

Retention of Title.
Notwithstanding delivery, **Title** to the Products remains with the Seller until the Seller has received full payment in cleared funds for:

- the purchase price of the Products, and
- all other amounts the Buyer owes the Seller in relation to the Products or any related Order.

Until Title passes to Buyer:

1. **Security Interest.** Buyer acknowledges that Seller retains, and Buyer grants Seller, a purchase-money security interest in the Products and their proceeds to secure all Buyer obligations.
2. **Segregation & Protection.** Buyer must store Products separately, keep them identifiable as Seller's property, insure them for full replacement value, and not alter or remove identifying marks.
3. **No Encumbrances.** Buyer may not pledge, encumber, sell, assign, or grant security interests in the Products before Title passes.
4. **Perfection of Security Interest.** Buyer authorizes Seller to file any financing statements or similar documents required to perfect and protect Seller's security interest.

If Buyer:

- fails to make any payment when due,
- breaches this Agreement, or
- becomes subject to insolvency or bankruptcy proceedings,

then:

(a) Seller may, without notice, enter Buyer's premises (where permitted by law) to **repossess** the Products.
(b) Buyer must make the Products available for collection at Seller's request.
(c) Seller may exercise any rights or remedies available at law; such rights are cumulative.

6. PRICES AND PAYMENTS

All prices and payments shall be in the currency stated in the Quote or Order.

Payment terms are **prepayment**, unless otherwise agreed in writing.

Seller may correct any pricing errors prior to acceptance of an Order.

~~Seller may modify or withdraw credit terms at any time and may require:~~

- ~~advance payment,~~
- ~~security, or~~
- ~~guarantees.~~

If Buyer fails to make timely payment, Seller may:

1. declare Buyer in breach and terminate the Order;
2. repossess unpaid Products;
3. withhold future shipments;
4. ~~require cash in advance for future shipments;~~
5. ~~charge interest at 1.5% per month (or the legal maximum);~~
6. ~~recover all costs of collection, including legal fees;~~
7. ~~combine any of the above remedies.~~

Commented [JG1]: The County will not agree to any late fees, payment or attorney fees, etc.

TinyConnectivity License and Functionality

Buyer acknowledges and agrees that ongoing operation and functionality of the Product(s) require timely payment of all applicable **TinyConnectivity License** fees.

The initial Quote specifies:

- the duration included in the purchase price, and
- when recurring License fees begin.

After the included period, continued use requires renewal at Seller's then-current rates.

7. OVERDUE PAYMENTS

Knox County requires a minimum of thirty (30) days to process payment after receipt of a properly submitted invoice. If an invoice has not been paid within thirty (30) days, Contractor shall contact the using department. The County will not agree to any late payment fees, penalties, etc. Any provision requiring late payment fees, penalties, etc., in a response to this solicitation or any other supplemental agreement(s) will not be accepted.

If Buyer fails to pay amounts when due:

(a) Initial Reminder

Seller will issue a written reminder after the payment due date.

(b) Second Reminder and Suspension Notice

If payment remains outstanding, Seller will send a second reminder including notice that TinyConnectivity License access and Product functionality may be suspended.

Seller may suspend access **no earlier than ten (10) business days after providing such written notice**.

(c) Suspension / Deactivation (Kill Switch)

If Buyer does not pay within the notice period, Seller may temporarily deactivate the Product(s) remotely.
Suspension does not relieve Buyer of payment obligations.

~~(d) Third-Party Collections~~

~~Seller may assign the debt to a third-party collection agency.~~

~~(e) Interest and Costs~~

~~Interest, administrative fees, and reasonable collection costs (including attorney fees) apply in accordance with applicable law~~.

(f) Material Breach

Non-payment constitutes a **material breach**. Seller may:

- terminate the Agreement for cause, and
- withhold all future deliverables.

Non-payment is not a termination by Buyer.

8. SETOFF

Buyer shall pay all amounts owed **without deduction, withholding, or setoff**.

No right of setoff is permitted unless expressly required by mandatory law.

9. CONNECTED SERVICES AND DATA USAGE

(a) Cloud Connectivity and Service Data

Buyer acknowledges that the Products rely on cloud connectivity for:

- operational logging
- firmware and software updates
- diagnostics and troubleshooting
- security and compliance
- validation of TinyConnectivity License status
- remote enable/disable functions

Seller may collect and process operational and telemetry data ("Service Data"), including but not limited to:

1. Product identifiers and serial numbers
2. Battery levels, operational hours, and performance metrics
3. Error codes, fault logs, and diagnostic information
4. GNSS-based location data
5. Usage patterns, timestamps, and operational records
6. Firmware/software versioning

Service Data is processed in accordance with Seller's Privacy Policy and may be shared with authorized subprocessors for operational purposes.

Where Service Data includes personal data, Seller's Data Processing Addendum (DPA) applies.

(b) In-Device Purchases and Orders

Some Product interfaces allow Buyer or authorized users to purchase:

- add-ons
- features
- software modules
- services or digital items

("In-Device Orders").

Any such purchase constitutes a binding order subject to this Agreement and any additional terms displayed at the point of purchase.

(c) TinyConnectivity License Requirements

The ongoing functionality of the Product(s), including cloud features, GNSS correction services, firmware updates, and remote diagnostics, requires an active **TinyConnectivity License**.

Buyer acknowledges:

1. The initial purchase may include a License period.
2. After this period, renewal is required for continued functionality.
3. If Buyer fails to pay License fees, Seller may suspend or deactivate functionality **after at least ten (10) business days' written notice**.
4. Functionality is restored once all outstanding fees are paid.

Kill Switch Acknowledgement

Buyer expressly acknowledges and agrees that:

- Seller may remotely disable Product functionality in cases of non-payment or material breach.
- Such disablement is temporary and reversible upon settlement of outstanding amounts.
- Seller shall not be liable for downtime, loss of business, or indirect damages resulting from such suspension.

(d) Lock-In Period and Reactivation

Upon activation of the TinyConnectivity License:

1. A **mandatory 12-month lock-in period** begins.
2. Buyer may terminate the License with **three (3) months' written notice**, effective no earlier than month nine (9).
3. If deactivated (including for non-payment), Buyer may request reactivation for a **reactivation fee**.
4. Each reactivation initiates a **new 12-month lock-in period**.

10. WARRANTY

(a) Warranty Scope

The Seller warrants that the Products, at time of shipment:

- conform to Seller's applicable specifications, and
- are free from defects in materials and workmanship.

The warranty period is **twelve (12) months** from shipment.

For repaired or replaced components, the warranty period is the longer of:

- the remainder of the original warranty, or
- six (6) months from repair shipment.

(b) Warranty Procedure

To receive warranty service, Buyer must:

1. Notify Seller of the Nonconformance within the warranty period.
2. Obtain a valid Return Material Authorization (RMA).
3. Upon notice of Nonconformance by the County, it will be the Seller's obligation to pick up the equipment. The County will not be liable for any shipping fees, or any other costs, associated with the return of the equipment.

If Seller determines no defect exists, Buyer must pay an **Evaluation / No-Defect-Found Fee**.

For validated claims, Seller pays reasonable round-trip transportation costs.

(c) Warranty Exclusions

This warranty does **not** apply to defects or issues caused by:

- improper installation, maintenance, storage, transportation, or use
- unauthorized modifications or repairs
- accident, misuse, neglect, contamination, or abuse
- failures caused by non-Seller equipment

(d) Operational Dependencies (Not Nonconformances)

The following performance characteristics **do not** constitute warranty claims:

(a) GNSS signal obstructions due to trees, stadiums, buildings, or reflective environments.

(b) Variability in cellular network availability, quality, or RTK signal availability, as these depend on third-party providers.

(c) Variations in line-marking or mowing results caused by:

- terrain irregularities, debris, or site conditions
- user-selected patterns or parameters
- improper site preparation
- settings chosen contrary to Seller recommendations

(e) Warranty Disclaimer

THIS WARRANTY IS EXCLUSIVE AND IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT.
SELLER SHALL NOT BE LIABLE FOR INDIRECT, INCIDENTAL, CONSEQUENTIAL, PUNITIVE, SPECIAL, OR EXEMPLARY DAMAGES.

11. EXCUSABLE DELAY (FORCE MAJEURE)

The Seller shall not be liable for delays or failures caused by events beyond its reasonable control, including:

- government actions, sanctions, or export restrictions
- natural disasters, floods, storms, or fires
- epidemics or pandemics
- strikes, lockouts, or labor disturbances
- riots, civil unrest, war, or terrorism
- failures or delays by carriers
- supply chain disruptions
- shortages of materials or components

If such circumstances continue for **six (6) months**, either party may terminate the affected Order without liability.

12. CANCELLATION

13. Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The County may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, County will pay for services satisfactorily completed but not yet invoiced. Contractor shall not perform additional work without the expressed permission of County.

14.

15.

16. In the event Contractor intends to interrupt service under this Contract, the Contractor shall provide notice to the County within [to be negotiated] business days of a planned interruption, including, but not limited to, normal planned system maintenance. In cases of unplanned interruptions and/or Force Majeure events, the Contractor shall notify the County as soon as possible of such interruptions.

17.

18. In the event the Contractor intends to discontinue service, and due to the timeframe required by the County to solicit and contract for goods and services, Contractor agrees to give Knox County at least one hundred twenty (120) day advance written notice of said discontinuance of service prior to discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

19.

20. If Contractor fails to perform or comply with any provision of this Contract or the terms or conditions of any documents referenced and made a part hereof, Knox County may terminate this Contract, in whole or in part, and may consider such failure or noncompliance a breach of Contract. Knox County expressly retains all its rights and remedies provided by law in case of such breach, and no action by Knox County shall constitute a waiver of any such rights or remedies. In the event of termination for default, Knox County reserves the right to purchase its requirements elsewhere,

with or without competitive bidding. ***and hold the defaulting vendor responsible for any excess costs occasioned thereby.*** Should vendor default be due to a failure to perform or because of a request for a price increase, Knox County reserves the right to remove the vendor from the County's bidder's list for twenty-four (24) months.

Seller may terminate an Order or this Agreement for convenience by written notice.

In such case:

Seller shall refund any prepaid TinyConnectivity License fees for periods after the effective termination date.

No further compensation or damages shall be owed.

21. DISPUTES

Except as otherwise expressly agreed in writing, any dispute, controversy, or claim arising out of or relating to:

- this Agreement,
- any Order, or
- the breach, termination, or validity thereof,

shall first be addressed through **good-faith negotiations** between the Parties.

If the Parties are unable to resolve the dispute within a reasonable time, the dispute shall be finally resolved by:

- **courts of competent jurisdiction** as mutually agreed,

depending on the governing law and forum specified in the relevant Order or the Parties' contract documents.

Each Party shall bear its own legal fees and costs unless otherwise determined by the tribunal or court.

Nothing in this section prevents either Party from seeking **urgent injunctive or equitable relief**.

22. APPLICABLE LAW

This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

23. LIMITATION OF LIABILITY

24. No provision of this Agreement shall act or be deemed to be a waiver by Knox County or the County/School System of any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the County/School System under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

NONDISCLOSURE AND NON-USE OF SELLER'S INFORMATION

25. Buyer is subject to the Tennessee Open Records Act 10-7-503 et seq. Seller is cautioned that all documents submitted shall be open to the public for viewing and inspection, and Knox County will comply with all legitimate requests.

26.

27. Seller shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices or by electronic means at all reasonable times during the Contract period and for five (5) years from the date of the final payment under this agreement for inspection by Buyer or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished, if requested. Such records shall not include those books, documents and accounting records that represent the Seller's costs of manufacturing or acquiring or delivering the products and services governed by this agreement.

These obligations survive the completion or termination of this Agreement.

28. PATENT INDEMNITY

(a) Indemnity by Seller

Except where Products are made according to Buyer's designs or specifications, the Seller shall:

- defend or settle any claim that a Product infringes a patent issued at the time of the Order,
- pay the amount of any final judgment awarded against the Buyer, and
- reimburse reasonable defense costs,

provided that the Buyer:

- gives prompt written notice, and
- grants Seller complete control of the defense and settlement.

Seller's indemnity does **not** apply to:

- any infringement arising from use outside the normal intended use,
- foreign patents,
- combinations of Seller's Products with non-Seller items,
- modifications not authorized by Seller.

Seller's liability is limited to the value of the Products sold to Buyer.

(b) Seller's Options

If any Product is alleged to infringe a patent, Seller may:

1. procure for Buyer the right to continue using the Product; or
2. replace or modify the Product to make it non-infringing; or
3. accept return of the Product and grant a credit (less reasonable depreciation).

(c) Indemnity by Buyer

If any Product is manufactured according to Buyer's specifications or instructions, then Buyer shall:

- defend, indemnify, and hold Seller harmless
- from any claim of infringement arising from such specifications,
- under the same conditions described above.

29. SOFTWARE LICENSE

If the Seller provides software or software documentation to the Buyer and no separate software license agreement is signed, the following terms apply:

1. **License Grant**
   Seller grants Buyer a limited, non-exclusive, non-transferable license to use the software only:
   (i) in connection with Seller's Products,
   (ii) to process data from Seller's Products, or
   (iii) on devices used to test or maintain Seller's Products.
2. **Copy Restrictions**
   Buyer may not copy software except for one archival copy, unless otherwise authorized.
3. **Transfer Restrictions**
   Buyer may not transfer or sublicense the software except with a resale of the corresponding Product, and only if the transferee agrees to the same terms.
4. **No Reverse Engineering**
   Buyer may not modify, translate, disassemble, decompile, reverse engineer, or create derivative works of the software.
5. **Confidentiality**
   Buyer must protect the software as confidential information and ensure employees follow these restrictions.
6. **Termination**
   Seller may terminate the license if Buyer breaches the terms and fails to cure within thirty (30) days. Buyer must stop using and return/destroy the software upon termination.
7. **Adjustments**
   Buyer acknowledges software may require adjustments for proper operation. Seller may assist for up to ninety (90) days.
8. **Government Use**
   If Buyer intends to provide the software to governmental entities, Buyer must first consult Seller regarding required markings and restrictions.
9. **Export Control**
   Buyer is responsible for compliance with applicable export laws.
10. **Licenses and Permits**
    Seller will seek export licenses if required, but is not obligated to perform any activity prohibited by law.

30. SPECIAL TOOLING AND DATA

Unless otherwise agreed in writing:

- all equipment, tooling, fixtures, molds, dies, jigs, gauges, test equipment, software, data, and processes used in manufacturing the Products
  ("Special Tooling")
  remain the exclusive property of the Seller;
- Buyer acquires **no ownership rights** in any drawings, specifications, engineering documentation, or data provided by Seller;
- all such materials are considered proprietary to Seller and protected under applicable law.

31. TAXES AND TARIFFS

Buyer purchases are not subject to taxation. Tax exemption certificates will be provided upon request. The Seller may adjust prices to reflect new or increased Taxes and Tariffs imposed after the date of the Seller's Quote and before delivery of the Products. The Seller will notify the Buyer of any required price adjustment.

If a new or increased Tax or Tariff results in a price increase to the Buyer, the Buyer may cancel the affected Order by providing written notice within **ten (10) business days** after receiving Seller's adjustment notice. If the Buyer does not cancel within this period, the adjusted price is deemed accepted.

For all other Taxes and Tariffs not triggering a cancellation right, the Seller may invoice Buyer for such amounts, and Buyer agrees to pay them.

This Section survives completion or termination of the Order.

32. ASSIGNMENT

Neither Party may assign this Agreement or any rights or obligations hereunder without the prior written consent of the other Party, which consent shall not be unreasonably withheld.

Any attempted assignment without such consent is void.

The non-assigning Party shall have no obligations to any purported assignee lacking valid consent.

33. WAIVER

Failure by the Seller to enforce any right or remedy under this Agreement shall not constitute a waiver of such right or remedy.

No waiver of any breach shall be deemed a waiver of any subsequent breach.

No waiver is effective unless made in writing and signed by an authorized representative of the Seller.

34. SEVERABILITY

If any provision of this Agreement is determined to be:

- illegal,
- invalid, or
- unenforceable,

that provision shall be deemed stricken only for the purpose of the specific dispute at issue. All remaining provisions shall continue in full force and effect.

35. ENTIRE AGREEMENT

These Terms and Conditions, together with the accepted Quote or Sales Order, constitute the **entire agreement** between the Parties concerning the sale of the Products.

Any modification, amendment, or additional terms must be expressly agreed in writing and signed by both Parties.

In the event of any conflict between these Terms and any other document, **Buyer's written contract will govern**

END USER LICENSE AGREEMENT

REGARDING SOFTWARE DEVELOPED OR PROVIDED BY TinyMobileRobots

1 PREAMBLE

1.1 TinyMobileRobots US LLC, a Georgia limited liability company located at 1634 Cobb International Blvd NW, Kennesaw, GA 30152, shall be referenced herein as "TMR". "Licensee" as referenced herein is defined as the person/company who has – either directly from TMR or via a distributor – purchased, rented, or leased one or more robots developed by TMR for which the TMR Software is intended to be used.

1.2 TMR has developed certain software products that may be used in connection with the use and control of (i) the robots that have been developed by TMR; and (ii) the tablets that are intended to be used in connection with the robots (hereinafter collectively referred to as the "Software Developed by TMR"). In connection with the use of the robots and the tablet, TMR may also provide to the Licensee certain third-party software and connected services delivered by TMR and external providers (hereinafter referred to as the "Third-Party Software"). The Software Developed by TMR and the Third-Party Software are hereinafter collectively referred to as the "TMR Software".

1.3 This End User License Agreement (hereinafter referred to as the "EULA") sets forth the terms and conditions for the use of the TMR Software, and Licensee's acceptance hereof is a condition for the grant of access to and the use of the TMR Software.

1.4 Third-Party Software may consist of software, data or documentation embedded in, included with, or otherwise intended to be used in relation to the robots, tablet or the Software Developed by TMR. A list of the Third-Party Software and the specific third-party license terms related hereto can be found on: Third-Party Software List (hereinafter referred to as the "Third-Party Software List"). The Licensee may get access to all or only some of the Third-Party Software stated on the Third-Party Software List. The Licensee accepts to be bound by and adhere to the license terms that apply to the Third-Party Software to which the Licensee has been given access. Also, the Licensee accepts and understands that the Third-Party Software List may be updated from time to time.

1.5 The Licensee's use of the TMR Software constitutes the Licensee's specific and unambiguous consent to be bound by this EULA, which establish the contractual agreement between TMR and the Licensee.

2 GRANT OF LICENSE AND INTELLECTUAL PROPERTY RIGTHS

2.1 TMR grants Licensee a non-exclusive, non-transferable, non-sublicensable, limited, revocable right to use the TMR Software. All rights not specifically granted in this EULA are reserved by TMR and no license is granted by TMR by implication.

2.2 All rights, title, and interest, including and without limitation all patent rights, copyrights, proprietary rights, trade secrets, trademarks, technical drawings, software, code, design applications, developments, know-how, creative ideas, formulae, methods, data technology, including any modifications to or improvements in the same and any and all intellectual property rights, whether now or hereafter perfected, pertaining thereto ("Intellectual Property Rights") provided by TMR in the course of providing the TMR Software to Licensee shall remain the exclusive property of TMR and/or TMR's affiliates and licensors.

2.3 No title to the Intellectual Property Rights of the TMR Software is transferred to Licensee. Title and full ownership rights to the TMR Software and related documentation will remain the exclusive property of TMR, and Licensee will not acquire any rights to the TMR Software except as expressly set out in this EULA.

2.4 Licensee will not dispute or contest, directly or indirectly, TMR's right, title and interest in and to the TMR Software.

2.5 The TMR Software under this EULA is only provided to Licensee for internal business purposes.

2.6 The Licensee shall not be entitled to:

(1) circumvent or bypass any technological protection measures in or relating to the TMR Software.

(2) disassemble, decompile, decrypt, copy, hack, emulate, store, exploit, nor reverse engineer any software or other aspect of the TMR Software that is included in or accessible through the TMR Software, nor examine or remake the source code or object code of the TMR Software or its structural framework.

(3) transfer, rent, lease, sell, export, import, distribute, publish, or lend any licenses, or any rights to access or use the TMR Software to any third party.

(4) use the TMR Software in violation of this EULA or in any unauthorized way that could interfere with general access to the TMR Software or enable access to the TMR Software or data stored therein or modify any TMR-authorised device by unauthorised third-party applications.

3 SCOPE OF TMR SOFTWARE UNDER THE LICENSE

3.1 TMR reserves the right to amend and update the TMR Software from time to time, including, but not limited to, amendments and updates regarding the availability of features and how long, how much or how often any given feature may be used.

For the avoidance of doubt, TMR is under no obligation to amend and update the TMR Software.

3.2 TMR will strive to make commercially reasonable efforts to correct reported errors in the TMR Software. However, TMR does not represent or warrant that the operation of the TMR Software will be uninterrupted or free from errors, or that TMR will correct any TMR Software errors.

3.3 If an update or amendment to the TMR Software requires a change of the format of the data uploaded to and stored within the TMR Software, it may be necessary to convert Licensee Data (as defined in Section 4.1 below) stored in the TMR Software to the new data format. TMR is not liable for any loss or destruction of data related to such conversion nor liable for any other adverse effects of such conversion.

3.4 Unless TMR and the Licensee have agreed in writing on the specific technical or support services to be provided by TMR, the License does not include any specific technical or other support, and TMR provides such support in TMR's sole discretion.

4 LICENSEE'S DATA AND PROTECTION OF DATA

4.1 Licensee retains ownership of any data, information or documentation uploaded by Licensee to the TMR Software (the "Licensee Data"), and such Licensee Data is considered Licensee's confidential information.

4.2 TMR will take appropriate and reasonable security measures in storing Licensee Data within the TMR Software and protecting the TMR Software against malware, viruses, and unauthorized access by third parties. The Licensee accepts and understands that TMR may share and disclose Licensee Data to (i) other companies that are owned or controlled by or affiliated with TMR (hereinafter collectively referred to as "Affiliated Companies"); (ii) TMR's distributors (or distributors of Affiliated Companies); and third parties assisting TMR in relation to providing support, updates, or development of the TMR Software.

4.3 Notwithstanding Section 4.2, Licensee shall maintain adequate backup-copies of any Licensee Data uploaded to or used within the TMR Software by Licensee.

4.4 The Licensee hereby grants TMR the right to collect and store Licensee Data, including Licensee Data related to usage patterns through use of application logging, *inter alia* for the purpose of TMR's application development, development, and improvement of the TMR Software, support services, statistical purposes, or other relevant purposes.

4.5 TMR does not process personal data in connection with the delivery of the TMR Software to Licensee.

5 NO WARRANTY

5.1 TMR PROVIDES THE TMR SOFTWARE "AS IS" AND "AS AVAILABLE" WITHOUT ANY WARRANTIES FOR THE TMR SOFTWARE, AND LICENSEE ASSUMES FULL RESPONSIBILITY FOR THE SELECTION OF THE TMR SOFTWARE TO FULFIL OR ACHIEVE LICENSEE'S INTENDED PURPOSES. TMR DOES NOT WARRANT THAT THE TMR SOFTWARE WILL BE ERROR OR DEFECT-FREE, UNINTERRUPTED, COMPLETELY SECURE, OR THAT SOFTWARE ERRORS, DEFECTS, OR BUGS CAN BE CORRECTED.

5.2 TO THE MAXIMUM EXTENT PERMITTED UNDER APPLICABLE LAW, TMR DISCLAIMS ANY AND ALL WARRANTIES, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, TITLE, NON-INFRINGEMENT AND FITNESS FOR A PARTICULAR PURPOSE.

6 INDEMNITY

Commented [JG1]: Knox County has not been given authority under the laws of the State of Tennessee to indemnify a contractor under any circumstances. This includes but is not limited to, Third Party Claims.

TMR shall indemnify, defend, save and hold harmless Licensee, its officers, agents and employees from all suits, claims, actions or damages of any nature brought because of, arising out of, or due to breach of the agreement by TMR, its subcontractors, suppliers, agents, or employees or due to any negligent act or occurrence or any omission or commission of TMR, its subcontractors, suppliers, agents or employees.

7 LIMITATION OF LIABILITY AND REMEDIES

No provision of this Agreement shall act or be deemed to be a waiver by Licenseeof any immunity or of any provision of the TENNESSEE GOVERNMENTAL TORT LIABILITY ACT. Tenn. Code Ann 29-20-101 et seq. Any liability to the Vendor or third parties for any claims, damages, losses, or costs arising out of, or related to acts performed by the Licensee under this Agreement will be governed and limited by the provisions of the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. 29-20-101 et seq."

8 CONFIDENTIALITY

Licensee is subject to the Tennessee Open Records Act 10-7-503 et seq. TMR is cautioned that all documents submitted shall be open to the public for viewing and inspection, and Buyer will comply with all legitimate requests.

TMRr shall maintain all books, documents, accounting records and other evidence pertaining to the goods and services provided under this Contract and make such materials available at its offices or by electronic means at all reasonable times during the Contract period and for five (5) years from the date of the final payment under this agreement for inspection by Licensee or by any other governmental entity or agency participating in the funding of this agreement, or any authorized agents thereof; copies of said records to be furnished, if requested. Such records shall not include those books, documents and accounting records that represent the TMR's costs of manufacturing or acquiring or delivering the products and services governed by this agreement.

8.1 For the purpose of performing their obligations under this EULA, the Parties may disclose to each other certain information in a variety of formats, which is either explicitly marked as "Confidential" or "Proprietary", or if not so marked, is information that a reasonable person would consider to be confidential or proprietary given its inherent nature or the circumstances of its disclosure ("Confidential Information"). Confidential Information includes Licensee Data, ideas, know-how, technology, practices, data, results, processes, documentation, products and strategies, whether technical or non-technical, verbal or written; technical, business, marketing, financial and other information. Licensee acknowledges that confidential aspects of the TMR Software (including source code) are trade secrets of TMR under applicable law.

8.2 Each Party shall treat the Confidential Information of the other Party as strictly confidential and proprietary and shall use such measures to protect the Confidential Information from disclosure as it does to protect its own Confidential Information, but in no case less than reasonable measures.

8.3 Neither Party shall, without prior written consent from the other, be entitled to provide any third party with Confidential Information unless this is acceptable in accordance with Section 4 or necessary to fulfil the purpose of this EULA.

8.4 Each Party shall ensure that Confidential Information is only disclosed to or used by its employees, consultants, subcontractors, or others who have a need to know in order to fulfil its obligations under this EULA. Each Party shall be liable for breach of the confidentiality obligations set forth in this Section 8 by its employees, consultants, subcontractors, or others accessing Confidential Information on its behalf.

8.5 Confidential Information shall not include information that:

(1) is or becomes available to the public at the time of its use or disclosure

through no breach of this EULA;

(2) is already known by the Receiving Party at the time of disclosure as evidenced by written documentation;

(3) is disclosed to the Receiving Party by a third party in lawful possession thereof and entitled to disclose the information; or

(4) a Party has a legal obligation to disclose; however, such Confidential Information remains Confidential Information regardless of such disclosure.

8.6 The obligations with respect to Confidential Information shall survive the termination of this EULA for three (3) years, or in the case of Confidential Information protectible as a trade secret under applicable law, indefinitely for so long as such information remains a trade secret.

8.7 Disclosure of Confidential Information by Licensee will result in substantial harm to TMR that cannot be remedied by the payment of damages alone. Accordingly,

TMR will be entitled to preliminary and permanent injunctive and other equitable relief for any breach of this Section 8.

9 TERMINATION, AND SUSPENSION

Notwithstanding any other provision of this Contract to the contrary, either party may terminate this Contract with or without cause at any time. The Licensee may terminate this Contract upon written notice of not less than thirty (30) days. Upon termination, Licensee will pay for services satisfactorily completed but not yet invoiced. TMR shall not perform additional work without the expressed permission of Licensee.

In the event TMR intends to interrupt service under this Contract, TMR shall provide notice to the Licensee within [to be negotiated] business days of a planned interruption, including, but not limited to, normal planned system maintenance. In cases of unplanned interruptions and/or Force Majeure events, TMR shall notify the Licensee as soon as possible of such interruptions.

In the event the TMR intends to discontinue service, and due to the timeframe required by the Licensee to solicit and contract for goods and services, TMR agrees to give Licensee at least one hundred twenty (120) day advance written notice of said discontinuance of service prior to discontinuing same. Any interruption or discontinuance of service without said advance notice shall constitute a material breach of this Contract.

If TMR fails to perform or comply with any provision of this Contract or the terms or conditions of any documents referenced and made a part hereof, Licensee may terminate this Contract, in whole or in part, and may consider such failure or noncompliance a breach of Contract. Licensee expressly retains all its rights and remedies provided by law in case of such breach, and no action by Licensee shall constitute a waiver of any such rights or remedies. In the event of termination for default, Licensee reserves the right to purchase its requirements elsewhere, with or without competitive bidding. ***and hold the TMR responsible for any excess costs occasioned thereby.***

Upon termination of this EULA, Licensee shall immediately cease any use of the TMR Software.Upon termination of this EULA, TMR provides Licensee with the possibility to re-trieve all Licensee Data. TMR reserves the right to delete any Licensee Data and/or Results after a period of 30 calendar days from the termination.

10 FORCE MAJEURE

10.1 Neither Party shall be responsible to the other Party for any failure or delay in its performance due to unavoidable or unforeseen circumstances beyond the reasonable control of either Party, provided that such Party gives prompt written notice thereof to the other Party and uses its diligent efforts to resume performance.

11 GENERAL PROVISIONS

Neither party shall transfer or assign any of its rights or obligations under this Agreement to any other person or entity without the express written permission of both parties, which permission shall not be unreasonably withheld. If Contractor assigns this contract to another party, an Assignment of Contract must be executed between the County and the new party. Knox County will draft this "Assignment of Contract" document. Any assignment without such express written permission may result in the automatic termination of this Agreement.

12 GOVERNING LAW AND VENUE

This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

TIPS VENDOR AGREEMENT

TIPS RFP 250106 Technology Solutions, Products, and Services

The following Vendor Agreement ("Agreement") creates a legal agreement between The Interlocal Purchasing System ("TIPS"), a government purchasing cooperative and Department of Texas Region 8 Education Service Center and (INSERT ENTITY NAME):

TinyMobileRobots

(ENTER ENTITY NAME]

its owners, agents, subsidiaries, and affiliates (together, "Vendor") (individually, "Party", and collectively the "Parties") and this agreement shall exclusively govern the contractual relationship ("Agreement") between the Parties.

TIPS, a governmental entity and a national purchasing cooperative seeks to provide a valuable and necessary solution to public entities and qualifying non-profits by performing the public procurement solicitation process and awarding compliant contracts to qualified vendors. Then, where the law of a customer's jurisdiction allows, instead of public entities and qualifying non-profits expending time, money, and resources on the extensive public procurement process, the use of TIPS allows public entities to quickly select and purchase their preferred products or services from qualified, competitively evaluated vendors through cooperative purchasing.

1. **Purpose.** The purpose of this Agreement is to identify the terms and conditions of the relationship between TIPS and Vendor. Public entities and qualifying non-profits that properly join or utilize TIPS ("TIPS Members") may elect to "piggyback" off of TIPS' procurements and agreements where the laws of their jurisdiction allow. TIPS Members are not contractual parties to this Agreement although terms and conditions of this Agreement may ensure benefits to TIPS Members.

2. **Authority.** The Parties agree that the signatories below are individual authorized to enter into this Agreement on behalf of their entity and that they are acting under due and proper authority under applicable law.

3. **Definitions.**

    a. **TIPS Pricing:** The specific pricing, discounts, and other pricing terms and incentives which Vendor submitted and TIPS approved for each respective TIPS Contract awarded to Vendor and all permissible, subsequent pricing updates submitted by Vendor and accepted by TIPS, if any.

    b. **Authorized Reseller:** A reseller or dealer authorized and added by a Vendor through their online TIPS Vendor Portal to make TIPS sales according to the terms and conditions herein.

4. **Entire Agreement.** This Agreement resulted from TIPS posting a "TIPS Solicitation" (RFP, RCSP, RFQ, or other) and Vendor submitting a proposal in response to that posted TIPS Solicitation for evaluation and award. The Parties agree that this Agreement consists of the provisions set forth herein and: (1) The TIPS solicitation document resulting in this Agreement; (2) Any addenda or clarifications issued in relation to the TIPS solicitation; (3) All solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor's entire proposal response to the TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, pricing, accepted responses to questions, and accepted written clarifications of Vendor's proposal, and; any properly included attachments to this Agreement. All documentation and information listed is hereby incorporated by reference as if set forth herein verbatim. In the event of conflict between the terms herein and one of the incorporated documents the terms and conditions herein shall control.

5. **Vendor's Specific Warranties, Terms, and License Agreements.** Because TIPS serves public entities and non-profits throughout the nation all of which are subject to specific laws and policies of their jurisdiction, as a matter of standard practice, TIPS does not typically accept a Vendor's specific "Sale Terms" (warranties, license agreements, master agreements, terms and conditions, etc.) on behalf of all TIPS Members. TIPS may permit Vendor to attach those to this Agreement to display to interested customers what terms may apply to their Supplemental Agreement with Vendor (if submitted by Vendor for that purpose). However, unless this term of the Agreement is negotiated and modified to state otherwise, those specific Sale Terms are not accepted by TIPS on behalf of all TIPS Members and each Member may choose whether to accept, negotiate, or reject those specific Sale Terms, which must be reflected in a separate agreement between Vendor and the Member in order to be effective.

6. **Vendor Identity and Contact Information.** It is Vendor's sole responsibility to ensure that all identifying vendor information (name, EIN, d/b/a's, etc.) and contact information is updated and current at all times within the TIPS eBid System and the TIPS Vendor Portal. It is Vendor's sole responsibility to confirm that all e-correspondence issued from tips-usa.com, ionwave.net, and tipsconstruction.com to Vendor's contacts are received and are not blocked by firewall or other technology security. Failure to permit receipt of correspondence from these domains and failure to keep vendor identity and contact information current at all times during the life of the contract may cause loss of TIPS Sales, accumulating TIPS fees, missed rebid opportunities, lapse of TIPS Contract(s), and unnecessary collection or legal actions against Vendor. It is no defense to any of the foregoing or any breach of this Agreement that Vendor was not receiving TIPS' electronic communications issued by TIPS to Vendor's listed contacts.

7. **Initiation of TIPS Sales.** When a public entity initiates a purchase with Vendor, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Once verified, Vendor must include the TIPS Contract Number on all purchase communications and sales documents exchanged with the TIPS Member.

8. **TIPS Sales and Supplemental Agreements.** The terms of the specific TIPS order, including but not limited to: shipping, freight, insurance, delivery, fees, bonding, cost, delivery expectations and location, returns, refunds, terms, conditions, cancellations, order assistance, etc., shall be controlled by the purchase agreement (Purchase Order, Contract, Invoice, etc.) (hereinafter "Supplemental Agreement") entered into between the TIPS Member Customer and Vendor only. TIPS is not a party to any Supplemental Agreement. All Supplemental Agreements shall include Vendor's Name, as known to TIPS, and TIPS Contract Name and Number. Vendor accepts and understands that TIPS is not a legal party to TIPS Sales and Vendor is solely responsible for identifying fraud, mistakes, unacceptable terms, or misrepresentations for the specific order prior to accepting. Vendor agrees that any order issued from a customer to Vendor, even when processed through TIPS, constitutes a legal contract between the customer and Vendor only. When Vendor accepts or fulfills an order, even when processed through TIPS, Vendor is representing that Vendor has carefully reviewed the order for legality, authenticity, and accuracy and TIPS shall not be liable or responsible for the same. In the event of a conflict between the terms of this TIPS Vendor Agreement and those contained in any Supplemental Agreement, the provisions set forth herein shall control unless otherwise agreed to and authorized by the Parties in writing within the Supplemental Agreement.

9. **Right of Refusal.** Vendor has the right not to sell to a TIPS Member under the awarded agreement at Vendor's discretion unless otherwise required by law.

10. **Reporting TIPS Sales.** Vendor must report all TIPS Sales to TIPS. If a TIPS sale is initiated by Vendor receiving a TIPS Member's purchase order from TIPS directly, Vendor may consider that specific TIPS Sale reported. Otherwise, with the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the purchase order or similar purchase document (with Vendor's Name, as known to TIPS, and the TIPS Contract Name and Number included) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion. Please refer to the TIPS Accounting FAQ's for more information about reporting sales and if you have further questions, contact the Accounting Team at accounting@tips-usa.com.

11. **TIPS Administration Fees.** The collection of administrative fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The administration fee ("TIPS Administration Fee") is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of the amount paid by the TIPS Member for each TIPS Sale, less shipping cost, bond cost, and taxes if applicable and identifiable, which is legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published in the corresponding solicitation and is incorporated herein by reference. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member, not on the Vendor's cost or on the amount for which the Vendor sold the item to a dealer or Authorized Reseller. Upon receipt of payment for a TIPS Sale, including partial payment (which renders TIPS Administration Fees immediately due), Vendor shall issue to TIPS the corresponding TIPS Administration Fee payment as soon as possible but not later than thirty-one calendar days following Vendor's receipt of payment. Vendor shall pay TIPS via check unless otherwise agreed to by the Parties in writing. Vendor shall include clear documentation with the issued payment dictating to which sale(s) the amount should be applied. Vendor may create a payment report within their TIPS Vendor Portal which is the preferred documentation dictating to which TIPS Sale(s) the amount should be applied. Failure to pay all TIPS Administration Fees pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion as well as the initiation of collection and legal actions by TIPS against Vendor to the extent permitted by law. Any overpayment of participation fees to TIPS by Vendor will be refunded to the Vendor

within ninety (90) days of receipt of notification if TIPS receives written notification of the overpayment not later than the expiration of six (6) months from the date of overpayment and TIPS determines that the amount was not legally due to TIPS pursuant to this agreement and applicable law. Any notification of overpayment received by TIPS after the expiration of six (6) months from the date that TIPS received the payment will render the overpayment non-refundable. Region 8 ESC and TIPS reserve the right to extend the six (6) month deadline if approved by the Region 8 ESC Board of Directors. TIPS reserves all rights under the law to collect TIPS Administration Fees due to TIPS pursuant to this Agreement.

12. **Term of the Agreement.** This Agreement with TIPS is for approximately five years with a one-year, consecutive option for renewal as described herein. Renewal options are not automatic and shall only be effective if offered by TIPS at its sole discretion. If TIPS offers a renewal option, the Vendor will be notified via email issued to Vendor's then-listed Primary Contact. The renewal option shall be deemed accepted by Vendor unless Vendor notifies TIPS of its objection to the renewal option in writing and confirms receipt by TIPS.

    Actual Effective Date: Agreement is effective upon signature by authorized representatives of both Parties. The Effective Date does not affect the "Term Calculation Start Date."

    Term Calculation Start Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, Vendor shall calculate the foregoing term as starting on the last day of the month that "Award Notifications" are anticipated as published in the Solicitation, regardless of the actual Effective Date.

    Example of Term Calculation Start Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023, in this example.

    Contract Expiration Date: To keep the contract term consistent for all vendors awarded under a single TIPS contract, the term expiration date shall be five years from the Term Calculation Start Date.

    Example of Contract Expiration Date: If the anticipated "Award Date" published in the Solicitation is May 22, 2023, but extended negotiations delay award until June 27, 2023 (Actual Effective Date), the Term Calculation Start Date shall be May 31, 2023, and the Contract Expiration Date of the resulting initial "five-year" term, (which is subject to an extension(s)) will be May 31, 2028 in this example.

    Option(s) for Renewal: Any option(s) for renewal shall begin on the Contract Expiration Date, or the date of the expiration of the prior renewal term where applicable, and continue for the duration specified for the renewal option herein.

    Example of Option(s) for Renewal: In this example, if TIPS offers a one-year renewal and the Contract Expiration Date is May 31, 2028, then the one-year renewal is effective from May 31, 2028 to May 31, 2029.

    TIPS may offer to extend Vendor Agreements to the fullest extent the TIPS Solicitation resulting in this Agreement permits.

13. **TIPS Pricing.** Vendor agrees and understands that for each TIPS Contract that it holds, Vendor submitted, agreed to, and received TIPS' approval for specific pricing, discounts, and other pricing terms and incentives which make up Vendor's TIPS Pricing for that TIPS Contract ("TIPS Pricing"). Vendor confirms that Vendor will not add the TIPS Administration Fee as a charge or line-item in a TIPS Sale. Vendor hereby certifies that Vendor shall only offer goods and services through this TIPS Contract if those goods and services are included in or added to Vendor's TIPS Pricing and approved by TIPS. TIPS reserves the right to review Vendor's pricing update requests as specifically as line-item by line-item to determine compliance. However, Vendor contractually agrees that all submitted pricing updates shall be within the original terms of the Vendor's TIPS Pricing (scope, proposed discounts, price increase limitations, and other pricing terms and incentives originally proposed by Vendor) such that TIPS may accept Vendors price increase requests as submitted without additional vetting at TIPS discretion. Any pricing quoted by Vendor to a TIPS Member or on a TIPS Quote shall never exceed Vendor's TIPS Pricing for any good or service offered through TIPS. TIPS Pricing price increases and modifications, if permitted, will be honored according to the terms of the solicitation and Vendor's proposal, incorporated herein by reference.

14. **Indemnification of TIPS.** VENDOR AGREES TO INDEMNIFY, HOLD HARMLESS, AND DEFEND TIPS, TIPS MEMBERS, TIPS OFFICERS, TIPS EMPLOYEES, TIPS DIRECTORS, AND TIPS TRUSTEES (THE "TIPS INDEMNITEES") FROM AND AGAINST ALL CLAIMS AND SUITS BY THIRD-PARTIES FOR DAMAGES, INJURIES TO PERSONS (INCLUDING DEATH), PROPERTY DAMAGES, LOSSES, EXPENSES, FEES, INCLUDING COURT COSTS, ATTORNEY'S FEES, AND EXPERT FEES, ARISING OUT OF OR RELATING TO VENDOR'S PERFORMANCE UNDER THIS AGREEMENT (INCLUDING THE PERFORMANCE OF VENDOR'S OFFICERS, EMPLOYEES, AGENTS, AUTHORIZED RESELLERS, SUBCONTRACTORS, LICENSEES, OR INVITEES), REGARDLESS OF THE NATURE OF THE CAUSE OF ACTION, INCLUDING WITHOUT LIMITATION CAUSES OF ACTION BASED UPON COMMON, CONSTITUTIONAL, OR STATUTORY LAW OR BASED IN WHOLE OR IN PART UPON ALLEGATIONS OF NEGLIGENT OR INTENTIONAL ACTS OR OMISSIONS ON THE PART OF VENDOR, ITS

OFFICERS, EMPLOYEES, AGENTS, AUTHORIZED RESELLERS, SUBCONTRACTORS, LICENSEES, OR INVITEES. **NO LIMITATION OF LIABILITY FOR DAMAGES FOR PERSONAL INJURY OR PROPERTY DAMAGE ARE PERMITTED OR AGREED TO BY TIPS.** APART FROM THIS INDEMNIFICATION PROVISION REQUIRING INDEMNIFICATION OF THE TIPS INDEMNITEES' ATTORNEY'S FEES AS SET FORTH ABOVE, RECOVERY OF ATTORNEYS' FEES BY THE PREVAILING PARTY IS AUTHORIZED ONLY IF AUTHORIZED BY TEX. EDUC. CODE § 44.032(F).

15. **Indemnification and Assumption of Risk – Vendor Data.** VENDOR AGREES THAT IT IS VOLUNTARILY PROVIDING DATA (INCLUDING BUT NOT LIMITED TO: VENDOR INFORMATION, VENDOR DOCUMENTATION, VENDOR'S PROPOSALS, VENDOR PRICING SUBMITTED OR PROVIDED TO TIPS, TIPS CONTRACT DOCUMENTS, TIPS CORRESPONDENCE, VENDOR LOGOS AND IMAGES, VENDOR'S CONTACT INFORMATION, VENDOR'S BROCHURES AND COMMERCIAL INFORMATION, VENDOR'S FINANCIAL INFORMATION, VENDOR'S CERTIFICATIONS, AND ANY OTHER VENDOR INFORMATION OR DOCUMENTATION, INCLUDING WITHOUT LIMITATION SOFTWARE AND SOURCE CODE UTILIZED BY VENDOR, SUBMITTED TO TIPS BY VENDOR AND ITS AGENTS) ("VENDOR DATA") TO TIPS. FOR THE SAKE OF CLARITY, AND WITHOUT LIMITING THE BREADTH OF THE INDEMNITY OBLIGATIONS IN SECTION 14 ABOVE, VENDOR AGREES TO PROTECT, INDEMNIFY, AND HOLD THE TIPS INDEMNITEES HARMLESS FROM AND AGAINST ANY AND ALL LOSSES, CLAIMS, ACTIONS, DEMANDS, ALLEGATIONS, SUITS, JUDGMENTS, COSTS, EXPENSES, FEES, INCLUDING COURT COSTS, ATTORNEY'S FEES, AND EXPERT FEES AND ALL OTHER LIABILITY OF ANY NATURE WHATSOEVER ARISING OUT OF OR RELATING TO: (I) ANY UNAUTHORIZED, NEGLIGENT OR WRONGFUL USE OF, OR CYBER DATA BREACH INCIDENT AND VIRUSES OR OTHER CORRUPTING AGENTS INVOLVING, VENDOR'S DATA, PRICING, AND INFORMATION, COMPUTERS, OR OTHER HARDWARE OR SOFTWARE SYSTEMS, AND; (II) ALLEGATIONS OR CLAIMS THAT ANY VENDOR DATA INFRINGES ON THE INTELLECTUAL PROPERTY RIGHTS OF A THIRD-PARTY OR VENDOR.

16. **Procedures Related to Indemnification.** In the event that an indemnity obligation arises, Vendor shall pay all amounts set forth in Section 14 and 15 above (including any settlements) and – if it has accepted its indemnity obligation without qualification – control the legal defense to such claim or cause of action, including without limitation attorney selection, strategy, discovery, trial, appeal, and settlement, and TIPS shall, at Vendor's cost and expense (with respect to reasonable out of pocket costs and expenses incurred by TIPS which shall be reimbursed to TIPS by Vendor), provide all commercially reasonable assistance requested by Vendor. In controlling any defense, Vendor shall ensure that all assertions of governmental immunity and all applicable pleas and defenses shall be promptly asserted.

17. **Indemnity for Underlying Sales and Supplemental Agreements.** Vendor shall be solely responsible for any customer claims or any disputes arising out of TIPS Sales or any Supplemental Agreement as if sold in the open-market. The Parties agree that TIPS shall not be liable for any claims arising out of Vendor's TIPS Sales or Supplemental Agreements, including but not limited to: allegations of product defect or insufficiency, allegations of service defect or insufficiency, allegations regarding delivery defect or insufficiency, allegations of fraud or misrepresentation, allegations regarding pricing or amounts owed for TIPS sales, and/or allegations regarding payment, over-payment, under-payment, or non-payment for TIPS Sales. Payment/Drafting, overpayment/over-drafting, under-payment/under-drafting, or non-payment for TIPS Sales between customer and Vendor and inspections, rejections, or acceptance of such purchases shall be the exclusive respective obligations of Vendor/Customer, and disputes shall be handled in accordance with the terms of the underlying Supplemental Agreement(s) entered into between Vendor and Customer. Vendor acknowledges that TIPS is not a dealer, subcontractor, agent, or reseller of Vendor's goods and services and shall not be responsible for any claims arising out of alleged insufficiencies or defects in Vendor's goods and services, should any arise.

18. **Confidentiality of Vendor Data.** Vendor understands and agrees that by signing this Agreement, all Vendor Data is hereby released to TIPS, TIPS Members, and TIPS third-party administrators to effectuate Vendor's TIPS Contract except as provided for herein. The Parties agree that Vendor Data is accessible by all TIPS Members as if submitted directly to that TIPS Member Customer for purchase consideration. If Vendor otherwise considers any portion of Vendor's Data to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code (the "Public Information Act") or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form which is required to be submitted as part of Vendor's proposal resulting in this Agreement and incorporated by reference. The Confidentiality Claim Form included in Vendor's proposal and incorporated herein by reference is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a Public Information Request. If TIPS receives a request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor Data deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law, including Attorney General determination and opinion. In the event that TIPS receives a written request for information pursuant to the Public Information Act that affects Vendor's interest in any information or data furnished to TIPS by Vendor, and TIPS requests an opinion from the Attorney General, Vendor may, at its own option and expense, prepare comments and submit information directly to the Attorney General stating why the requested information is exempt from disclosure pursuant to the requirements of the Public Information Act. Vendor is solely responsible for submitting the memorandum brief and information to the Attorney General within the time period prescribed by the Public Information Act. Notwithstanding any other information provided in this solicitation

or Vendor designation of certain Vendor Data as confidential or proprietary, Vendor's acceptance of this TIPS Vendor Agreement constitutes Vendor's consent to the disclosure of Vendor's Data, including any information deemed confidential or proprietary, to TIPS Members or as ordered by a Court or government agency, including without limitation the Texas Attorney General. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation by TIPS Members or as required by law.

19. **Vendor's Authorized Resellers.** TIPS recognizes that many vendors operate in the open market through the use of resellers or dealers. For that reason, TIPS permits Vendor to authorize Authorized Resellers within its Vendor Portal and make TIPS Sales through the Authorized Reseller(s). Once authorized by Vendor in the Vendor Portal, the Authorized Reseller(s) may make TIPS sales to TIPS Members. However, all purchase documents must include: (1) Authorized Reseller's Name; (2) Vendor's Name, as known to TIPS, and; (3) Vendor's TIPS Contract Name and Number under which it is making the TIPS Sale. Either Vendor or Reseller may report the sale pursuant to the terms herein. However, Vendor agrees that it is legally responsible for all reporting and fee payment as described herein for TIPS Sales made by Authorized Resellers. The TIPS Administration Fee is assessed on the amount paid by the TIPS Member, not on the Vendor's cost or on the amount for which the Vendor sold the item to a dealer or Authorized Reseller. The Parties intend that Vendor shall be responsible and liable for TIPS Sales made by Vendor's Authorized Resellers. Vendor agrees that it is voluntarily authorizing this Authorized Reseller and in doing so, Vendor agrees that it is doing so at its own risk and agrees to protect, indemnify, and hold TIPS harmless in accordance with Sections 14-17 above related to Authorized Reseller TIPS Sales made pursuant to this Agreement or purporting to be made pursuant to this Agreement that may be asserted against Vendor whether rightfully brought or otherwise. The Parties further agree that it is no defense to Vendor's breach of this Agreement that an Authorized Reseller caused Vendor of breach this Agreement.

20. **Circumvention of TIPS Sales**. When a public entity initiates a purchase with Vendor, if the Member inquires verbally or in writing whether Vendor holds a TIPS Contract, it is the duty of the Vendor to verify whether the Member is seeking a TIPS purchase. Any request for quote, customer communication, or customer purchase initiated through or referencing a TIPS Contract shall be completed through TIPS pursuant to this Agreement. Any encouragement or participation by Vendor in circumventing a TIPS sale being completed may result in immediate termination of Vendor's TIPS Contract(s) for cause as well as preclusion from future TIPS opportunities at TIPS sole discretion.

21. **State of Texas Franchise Tax.** By signature hereon, Vendor hereby certifies that Vendor is not currently delinquent in the payment of any franchise taxes owed to the State of Texas under Chapter 171 of the Texas Tax Code.

22. **Termination.**

A) Termination for Convenience. TIPS may, by written notice to Vendor, terminate this Agreement for convenience, in whole or in part, at any time by giving thirty (30) days' written notice to Vendor of such termination, and specifying the effective date thereof.

B) Termination for Cause. If Vendor fails to materially perform pursuant to the terms of this Agreement, TIPS shall provide written notice to Vendor specifying the default. If Vendor does not cure such default within thirty (30) days, TIPS may terminate this Agreement, in whole or in part, for cause. If TIPS terminates this Agreement for cause, and it is later determined that the termination for cause was wrongful, the termination shall automatically be converted to and treated as a termination for convenience.

C) Vendor's Termination. If TIPS fails to materially perform pursuant to the terms of this Agreement, Vendor shall provide written notice to TIPS specifying the default ("Notice of Default"). If TIPS does not cure such default within thirty (30) days, Vendor may terminate this Agreement, in whole or in part, for cause. If Vendor terminates this Agreement for cause, and it is later determined that the termination for cause was wrongful, the termination shall automatically be converted to and treated as a termination for convenience.

D) Upon termination, all TIPS Sale orders previously accepted by Vendor shall be fulfilled and Vendor shall be paid for all TIPS Sales executed pursuant to the applicable terms. All TIPS Sale orders presented to Vendor but not fulfilled by Vendor, prior to the actual termination of this agreement shall be honored at the option of the TIPS Member. TIPS shall submit to Vendor an invoice for any outstanding TIPS Administration Fees and approved expenses and Vendor shall pay such fees and expenses within 30 calendar days of receipt of such valid TIPS invoice. Vendor acknowledges and agrees that continued participation in TIPS is subject to TIPS' sole discretion and that any Vendor may be removed from the TIPS program at any time with or without cause. This termination clause does not affect TIPS Sales Supplemental Agreements pursuant to this term regarding

termination and the Survival Clause term.

E) Vendor hereby waives any and all claims for damages, including, but not limited, to consequential damages or lost profits, that might arise from TIPS' act of terminating this Agreement.

23. **Survival Clause.** It is the intent of the Parties that this Agreement and procurement method applies to any TIPS Sale made during the life of this Agreement even if made on or near the Contract Expiration Date as defined herein. Thus, all TIPS Sales, including but not limited to: leases, service agreements, license agreements, open purchase orders, warranties, and contracts, even if they extend months or years past the TIPS Contract Expiration Date, shall survive the expiration or termination of this Agreement subject to the terms and conditions of the Supplemental Agreement between Customer and Vendor or unless otherwise specified herein.

24. **Audit Rights.** Due to transparency statutes and public accountability requirements of TIPS and TIPS Members, Vendor shall at their sole expense, maintain documentation of all TIPS Sales for a period of three years from the time of the TIPS Sale. In order to ensure and confirm compliance with this agreement, TIPS shall have authority to conduct audits of Vendor's TIPS Pricing or TIPS Sales with thirty-days' notice unless the audit is ordered by a Court Order or by a Government Agency with authority to do so without said notice. Notwithstanding the foregoing, in the event that TIPS is made aware of any pricing being offered to eligible entities that is materially inconsistent with Vendor's TIPS Pricing, TIPS shall have the ability to conduct the audit internally or may engage a third- party auditing firm to investigate any possible non-compliant conduct or may terminate the Agreement according to the terms of this Agreement. In the event of an audit, the requested materials shall be reasonably provided in the time, format, and at the location acceptable to TIPS. TIPS agrees not to perform a random audit the TIPS transaction documentation more than once per calendar year, but reserves the right to audit for just cause or as required by any governmental agency or court with regulatory authority over TIPS or the TIPS Member. These audit rights shall survive termination of this Agreement for a period of one (1) year from the effective date of termination.

25. **Conflicts of Interest.** The Parties confirm that they have not offered, given, or accepted, nor intend to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, service to the other in connection with this Agreement. Vendor affirms that, to the best of Vendor's knowledge, this Agreement has been arrived at independently, and is awarded without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this Agreement. Vendor agrees that it has disclosed any necessary affiliations with Region 8 Education Service Center and the TIPS Department, if any, through the Conflict of Interest attachment provided in the solicitation resulting in this Agreement.

26. **Volume of TIPS Sales.** Nothing in this Agreement or any TIPS communication may be construed as a guarantee that TIPS or TIPS Members will submit any TIPS orders to Vendor at any time.

27. **Compliance with the Law.** The Parties agree to comply fully with all applicable federal, state, and local statutes, ordinances, rules, and regulations applicable to their entity in connection with the programs contemplated under this Agreement.

28. **Severability.** If any term(s) or provision(s) of this Agreement are held by a court of competent jurisdiction to be invalid, void, or unenforceable, then such term(s) or provision(s) shall be deemed restated to reflect the original intention of the Parties as nearly as possible in accordance with applicable law and the remainder of this Agreement, and the remainder of the provisions of this Agreement shall remain in full force and effect and shall in no way be affected, impaired or invalidated, unless such holding causes the obligations of the Parties hereto to be impossible to perform or shall render the terms of this Agreement to be inconsistent with the intent of the Parties hereto.

29. **Force Majeure.** If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement through no fault of its own then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon. Upon delivering such notice, the obligation of the affected party, so far as it is affected by such Force Majeure as described, shall be suspended during the continuance of the inability then claimed but for no longer period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch. In the event that Vendor's obligations are suspended by reason of Force Majeure, all TIPS Sales accepted prior to the Force Majeure event shall be the legal responsibility of Vendor and the terms of the TIPS Sale Supplemental Agreement shall control Vendor's failure to fulfill for a Force Majeure event.

30. **Immunity.** Vendor agrees that nothing in this Agreement shall be construed as a waiver of sovereign or government immunity; nor constitute or be construed as a waiver of any of the privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department. The failure to enforce, or any delay in the enforcement of, any privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department under this Agreement or under

applicable law shall not constitute a waiver of such privileges, rights, defenses, remedies, or immunities or be considered as a basis for estoppel.

31. **Insurance Requirements.** Vendor agrees to maintain the following minimum insurance requirements for the duration of this Agreement. All policies held by Vendor to adhere to this term shall be written by a carrier with a financial size category of VII and at least a rating of "A-" by A.M. Best Key Rating Guide. The coverages and limits are to be considered minimum requirements and in no way limit the liability of the Vendor(s). Any immunity available to TIPS or TIPS Members shall not be used as a defense by the contractor's insurance policy. Only deductibles applicable to property damage are acceptable, unless proof of retention funds to cover said deductibles is provided. "Claims made" policies will not be accepted. Vendor's required minimum coverage shall not be suspended, voided, cancelled, non-renewed or reduced in coverage or in limits unless replaced by a policy that provides the minimum required coverage except after thirty (30) days prior written notice by certified mail, return receipt requested has been given to TIPS or the TIPS Member if a project or pending delivery of an order is ongoing. Upon request, certified copies of all insurance policies shall be furnished to the TIPS or the TIPS Member. Vendor agrees that when Vendor or its subcontractors are liable for any damages or claims, Vendor's policy, shall be primary over any other valid and collectible insurance carried by the Member or TIPS.

General Liability:	$1,000,000 each Occurrence/Aggregate
Automobile Liability:	$300,000 Includes owned, hired & non-owned
Workers' Compensation:	Statutory limits for the jurisdiction in which the Vendor performs under this Agreement. If Vendor performs in multiple jurisdictions, Vendor shall maintain the statutory limits for the jurisdiction with the greatest dollar policy limit requirement.
Umbrella Liability:	$1,000,000 each Occurrence/Aggregate

32. **Waiver.** No waiver of any single breach or multiple breaches of any provision of this Agreement shall be construed to be a waiver of any breach of any other provision. No delay in acting regarding any breach of any provision shall be construed to be a waiver of such breach.

33. **Binding Agreement.** This Agreement shall be binding and inure to the benefit of the Parties hereto and their respective heirs, legal successors, and assigns.

34. **Headings.** The paragraph headings contained in this Agreement are included solely for convenience of reference and shall not in any way affect the meaning or interpretation of any of the provisions of this Agreement.

35. **Choice of Law and Venue.** This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of Texas. Any proceeding, claim, action, or alternative dispute resolution arising out of or relating to this Agreement or involving TIPS shall be brought in a State Court of competent jurisdiction in Camp County, Texas, or if Federal Court is legally required, a Federal Court of competent jurisdiction in the Eastern District of Texas, and each of the Parties irrevocably submits to the exclusive jurisdiction of said court in any such proceeding, waives any objection it may now or hereafter have to venue or to convenience of forum, agrees that all claims in respect of the proceeding shall be heard and determined only in any such court, and agrees not to bring any proceeding arising out of or relating to this procurement process or any contract resulting from or and contemplated transaction in any other court. The Parties agree that either or both of them may file a copy of this paragraph with any court as written evidence of the knowing, voluntary and freely bargained for agreement between the Parties irrevocably to waive any objections to venue or to convenience of forum.

36. **Relationship of the Parties.** Nothing contained in this Agreement shall be construed to make one Party an agent of the other Party nor shall either party have any authority to bind the other in any respect, unless expressly authorized by the other party in writing. The Parties are independent contractors and nothing in this Agreement creates a relationship of employment, trust, agency or partnership between them.

37. **Assignment.** No assignment of this Agreement or of any duty or obligation of performance hereunder, shall be made in whole or in part by a Party hereto without the prior written consent of the other Party. Written consent of TIPS shall not be unreasonably withheld.

38. **Minimum Condition and Warranty Requirements for TIPS Sales.** All goods quoted or sold through a TIPS Sale shall be new unless clearly stated otherwise in writing. All new goods and services shall include the applicable manufacturers minimum standard warranty unless otherwise agreed to in the Supplemental Agreement.

39. **Minimum Customer Support Requirements for TIPS Sales.** Vendor shall provide timely and commercially reasonable support for TIPS Sales or as agreed to in the applicable Supplemental Agreement.

40. **Minimum Shipping Requirements for TIPS Sales.** Vendor shall ship, deliver, or provide ordered goods and services within a commercially reasonable time after acceptance of the order. If a delay in delivery is anticipated, Vendor shall notify the TIPS Member as to why delivery is delayed and provide an updated estimated time for completion. The TIPS Member may cancel the order if the delay is not commercially acceptable or not consistent with the Supplemental Agreement applicable to the order.

41. **Minimum Vendor License Requirements.** Vendor shall maintain, in current status, all federal, state, and local licenses, bonds and permits required for the operation of the business conducted by Vendor. Vendor shall remain fully informed of and in compliance with all ordinances and regulations pertaining to the lawful provision of goods or services under the TIPS Agreement. TIPS and TIPS Members reserve the right to stop work and/or cancel a TIPS Sale or terminate this or any TIPS Sale Supplemental Agreement involving Vendor if Vendor's license(s) required to perform under this Agreement or under the specific TIPS Sale have expired, lapsed, are suspended or terminated subject to a 30-day cure period unless prohibited by applicable statue or regulation.

42. **Minimum Vendor Legal Requirements.** Vendor shall remain aware of and comply with this Agreement and all local, state, and federal laws governing the sale of products/services offered by Vendor under this contract. Such applicable laws, ordinances, and policies must be complied with even if not specified herein.

43. **Minimum Site Requirements for TIPS Sales (*when applicable to TIPS Sale*).**

Cleanup: When performing work on site at a TIPS Member's property, Vendor shall clean up and remove all debris and rubbish resulting from their work as required or directed by the TIPS Member or as agreed by the parties. Upon completion of work, the premises shall be left in good repair and an orderly, neat, clean and unobstructed condition.

Preparation: Vendor shall not begin a project for which a TIPS Member has not prepared the site, unless Vendor does the preparation work at no cost, or until TIPS Member includes the cost of site preparation in the TIPS Sale Site preparation includes, but is not limited to: moving furniture, installing wiring for networks or power, and similar pre-installation requirements.

Registered Sex Offender Restrictions: For work to be performed at schools, Vendor agrees that no employee of Vendor or a subcontractor who has been adjudicated to be a registered sex offender will perform work at any time when students are, or reasonably expected to be, present unless otherwise agreed by the TIPS Member. Vendor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the TIPS Sale at the TIPS Member's discretion. Vendor must identify any additional costs associated with compliance of this term. If no costs are specified, compliance with this term will be provided at no additional charge.

Safety Measures: Vendor shall take all reasonable precautions for the safety of employees on the worksite, and shall erect and properly maintain all necessary safeguards for protection of workers and the public. Vendor shall post warning signs against all hazards created by the operation and work in progress. Proper precautions shall be taken pursuant to state law and standard practices to protect workers, general public and existing structures from injury or damage.

Smoking: Persons working under Agreement shall adhere to the TIPS Member's or local smoking statutes, codes, ordinances, and policies.

44. **Payment for TIPS Sales.** TIPS Members may make payments for TIPS Sales directly to Vendor, Vendor's Authorized Reseller, or as otherwise agreed to in the applicable Supplemental Agreement after receipt of the invoice and in compliance with applicable payment statutes. Regardless of how payment is issued or received for a TIPS Sale, Vendor is responsible for all reporting and TIPS Administration Fee payment requirements as stated herein.

45. **Marketing.** Vendor agrees that any logos, images, photos, writing, audio, clip art, music, data, promotional documents, or any other information or intellectual property ("Vendor Property") approved or provided by Vendor for TIPS' use are either the exclusive property of Vendor, or Vendor has all necessary rights, license, and permissions to allow TIPS use of Vendor Property. Vendor permits TIPS to use their name and logo to identify Vendor as a TIPS Awarded Vendor on the TIPS website only. All other use of Vendor's Property by TIPS shall require prior written Vendor approval. Any Vendor use of TIPS' logos, images, photos, writing, audio, clip art, music, data, promotional documents, or any other information or intellectual property ("TIPS Property") or reference to TIPS in marketing outreach requires Vendor to obtain prior written authorization from marketing@tips-usa.com which will not be unreasonably withheld. Vendor must execute a TIPS Marketing Waiver before specific, written authorization will be granted. For any marketing outreach taken by Vendor without proper TIPS' authorization and execution of the TIPS Marketing Waiver, **Vendor shall indemnify**

and hold harmless TIPS and its employees, officers, agents, representatives, contractors, assignees, designees, and TIPS Members from any and all claims, damages, and judgments involving:

i. **Infringement of patent, copyright, trade secrets, trade or services marks, and any other intellectual or intangible property rights and/or claims arising from the Vendor's (including Vendor's officers', employees', agents', authorized resellers', subcontractors', or invitees') unauthorized use or distribution of Vendor Property.**

ii. **Violations of privacy and data laws; and**

iii. **Unauthorized use or distribution of TIPS Property.**

46. **Tax Exempt Status of TIPS Members.** Most TIPS Members are tax exempt entities and the laws and regulations applicable to the specific TIPS Member customer shall control.

47. **Automatic Renewal Limitation for TIPS Sales.** No TIPS Sale may incorporate an automatic renewal clause that exceeds month to month terms with which the TIPS Member must comply. All renewal terms incorporated into a TIPS Sale Supplemental Agreement shall only be valid and enforceable when Vendor received written confirmation of acceptance of the renewal term from the TIPS Member for the specific renewal term. The purpose of this clause is to avoid a TIPS Member inadvertently renewing an Agreement during a period in which the governing body of the TIPS Member has not properly appropriated and budgeted the funds to satisfy the Agreement renewal. Any TIPS Sale Supplemental Agreement containing an "Automatic Renewal" clause that conflicts with these terms is rendered void and unenforceable.

48. **Choice of Law Limitation for TIPS Sales.** Vendor agrees that if any "Choice of Law" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Choice of Law" applicable to the TIPS Sale agreement/contract between Vendor and TIPS Member shall be the state where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Choice of Law" clause that conflicts with these terms is rendered void and unenforceable.pr

49. **Venue Limitation for TIPS Sales.** Vendor agrees that if any "Venue" provision is included in any TIPS Sale Agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Venue" for any litigation or alternative dispute resolution shall be in the state and county where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Venue" clause that conflicts with these terms is rendered void and unenforceable.

50. **Indemnity Limitation for TIPS Sales.** Texas and other jurisdictions restrict the ability of governmental entities to indemnify others. Vendor agrees that if any "Indemnity" provision which requires the TIPS Member to indemnify Vendor is included in any TIPS sales agreement/contract between Vendor and a TIPS Member, that clause must either be stricken or qualified by including that such indemnity is only permitted, "to the extent permitted by the laws and constitution of [TIPS Member's State]" unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing an "Indemnity" clause that conflicts with these terms is rendered void and unenforceable.

51. **Arbitration Limitation for TIPS Sales.** Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause may not require that the arbitration is mandatory or binding. Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause provides for only voluntary and non-binding arbitration unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Arbitration" clause that conflicts with these terms is rendered void and unenforceable.

In Witness Whereof, the parties hereto, each acting under due and proper authority, have signed this Agreement.

TIPS VENDOR AGREEMENT SIGNATURE FORM TIPS

250106 Technology Solutions, Products, and Services

Vendor Name: TinyMobileRobots

Vendor Address: 1634 Cobb International Blvd NW

City: Kennesaw State: GA Zip Code: 30152

Vendor Authorized Signatory Name: Ty Wood

Vendor Authorized Signatory Title: Marketing Manager

Vendor Authorized Signatory Phone: 4045951145

Vendor Authorized Signatory Email: robotbids@tinymobilerobots.com

Vendor Authorized Signature: Ty Wood Date: 02/20/2025

(The following is for TIPS completion only)

TIPS Authorized Signatory Name: Dr. Fitts

TIPS Authorized Signatory Title: Executive Director

TIPS Authorized Signature: David Wayne Fitts Date: 05/22/2025



250106
TinyMobileRobots
Supplier Response

Event Information

Number: 250106
Title: Technology Solutions, Products, and Services
Type: Request for Proposal
Issue Date: 1/6/2025
Deadline: 2/21/2025 03:00 PM (CT)
Notes: This is a solicitation issued by The Interlocal Purchasing System (TIPS), a department of Texas Region 8 Education Service Center. It is an Indefinite Delivery, Indefinite Quantity ("IDIQ") solicitation. It will result in contracts that provide, through adoption/"piggyback" an indefinite quantity of supplies/services, during a fixed period of time, to TIPS public entity and qualifying non-profit "TIPS Members" throughout the nation. Thus, there is no specific project or scope of work to review. Rather this solicitation is issued as a prospective award for utilization when any TIPS Member needs the goods or services offered during the life of the agreement.

IF YOU CURRENTLY HOLD ANY TIPS CONTRACT IN THE "TECHNOLOGY SOLUTIONS, PRODUCTS, AND SERVICES" CATEGORY, AND YOU ARE SATISFIED WITH IT, THERE IS NO NEED TO RESPOND TO THIS SOLICITATION.

IF YOU HOLD AN EXISTING TIPS "TECHNOLOGY SOLUTIONS, PRODUCTS, AND SERVICES" CONTRACT AND YOU CHOOSE TO RESPOND HEREIN, YOUR EXISTING TIPS "TECHNOLOGY SOLUTIONS, PRODUCTS, AND SERVICES" CONTRACT WILL

BE TERMINATED AND REPLACED BY THIS CONTRACT.

ALSO IF YOU HOLD ANY OTHER TIPS CONTRACT OUTSIDE OF THE "TECHNOLOGY SOLUTIONS, PRODUCTS, AND SERVICES" CATEGORY WHICH COVERS ALL OF YOUR TECHNOLOGY OFFERINGS AND YOU ARE SATISFIED WITH IT, THERE IS NO NEED TO RESPOND TO THIS SOLICITATION UNLESS YOU PREFER TO HOLD BOTH CONTRACTS.

Contact Information

Address: Region 8 Education Service Center
4845 US Highway 271 North
Pittsburg, TX 75686
Phone: +1 (866) 839-8477
Email: bids@tips-usa.com

TinyMobileRobots Information

Contact: Matt Thavenius
Address: 1634 Cobbs International Blvd NW
Kennesaw, GA 30144
Phone: (631) 307-2310
Email: mth@tinymobilerobots.com
Web Address: https://tinymobilerobots.us/

By submitting your response, you certify that you are authorized to represent and bind your company.

Gary Garrison
Signature

robotbids@tinymobilerobots.com
Email

Submitted at 2/20/2025 11:03:56 AM (CT)

Requested Attachments

Pricing Form 1

250106 Pricing Form 1 - TinyMobileRobots.xlsx

Pricing Form 1 must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed as instructed, and uploaded to this location.

Pricing Form 2

250106 Pricing Form 2 - TinyMobileRobots.xlsx

Pricing Form 2 must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed as instructed, and uploaded to this location.

(3) Required Customer Reference Letters

TinyMobileRobots Reference Letters.pdf

Vendor is required to upload three Customer Reference Letters from three separate customers as described herein. Vendor will be scored on the aggregate Reference Letters received from customers as described in the solicitation. Vendor must provide three current letters (issued within the 12-months preceding the date on which the solicitation was posted) from its customers verifying Vendor's customer service and reputation as described herein. (Ex. if the solicitation/bid posted on February 4, 2024, the letters must be dated on or after February 1, 2023). The letters must be issued from customers who have received goods or services from the Vendor or its current corporate officials, on entity/company letterhead, must specify its customer experience with Vendor, and must be signed by an authorized representative of the customer. TIPS Reference Forms from past bids will no longer be accepted.

Required Confidentiality Claim Form

250106 Required Confidentiality Claim Form - TinyMobileRobots.pdf

The Required Confidentiality Claim Form must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. This is the only way for Vendor to assert confidentiality of any information submitted.

Vendor Agreement

250106 Vendor Agreement - TinyMobileRobots.pdf

The Vendor Agreement must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, Vendor Name placed in the line provided at the top, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement, Vendor may assert so in the Attribute Questions and those shall be addressed during evaluation.

Vendor Agreement Signature Form

250106 Vendor Agreement Signature Form - TinyMobileRobots.pdf

The Vendor Agreement Signature Form must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location. If Vendor has proposed deviations to the Vendor Agreement, Vendor may leave the signature line of this page blank and assert so in the Attribute Questions and those shall be addressed during evaluation.

Current Form W-9

TinyMobileRobots US LLC W-9.pdf

Vendor must upload their current IRS Tax Form W-9. The legal name, EIN, and d/b/a's listed should match the information provided herein exactly. This form will be utilized by TIPS to properly identify your entity.

Alternate or Supplemental Pricing Documents

No response

Optional. If when completing Pricing Form 1 & Pricing Form 2 you direct TIPS to view additional, alternate, or supplemental pricing documentation, you may upload that documentation.

Certificates & Licenses (Supplemental Vendor Information Only)

No response

Optional. If Vendor would like to display any applicable certificates or licenses (including HUB certificates) for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor Logo (Supplemental Vendor Information Only)

No response

Optional. If Vendor desires that their logo be displayed on their public TIPS profile for TIPS and TIPS Member viewing, Vendor may upload that logo at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Supplemental Vendor Information (Supplemental Vendor Information Only)

No response

Optional. If Vendor would like to display or include any brochures, promotional documents, marketing materials, or other Vendor Information for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Vendor's Warranties, Terms, and Conditions (Supplemental Vendor Information Only)

No response

Optional. If Vendor would like to display any standard warranties, terms, or conditions which are often applicable to their offerings for TIPS and TIPS Member Customer consideration, Vendor may upload those at this location. These supplemental documents shall not be considered part of the TIPS Contract. Rather, they are Vendor Supplemental Information for marketing and informational purposes only.

Disclosure of Lobbying Activities - Standard Form - LLL

No response

Do not upload this form unless Vendor has reportable lobbying activities. There are Attributes entitled, "2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Disclosure of Lobbying Activities – Standard Form - LLL must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded to this location.

Conflict of Interest Questionnaire - Form CIQ

No response

Do not upload this form unless you have a reportable conflict with TIPS. There is an Attribute entitled "Conflict of Interest Questionnaire Requirement" immediately followed by an Attribute entitled "Conflict of Interest Questionnaire Requirement – Form CIQ – Continued." Properly respond to those Attributes and only upload this form if applicable/instructed. If upload is required based on your response to those Attributes, the Conflict of Interest Questionnaire – Form CIQ must be downloaded from the "Attachments" section of the IonWave eBid System, reviewed, properly completed, and uploaded at this location.

Bid Attributes

1 Disadvantaged/Minority/Women Business & Federal HUBZone

Some participating public entities are required to seek Disadvantaged/Minority/Women Business & Federal HUBZone ("D/M/WBE/Federal HUBZone") vendors. Does Vendor certify that their entity is a D/M/WBE/Federal HUBZone vendor?

If you respond "Yes," you must upload current certification proof in the appropriate "Response Attachments" location.

NO

2 Historically Underutilized Business (HUB)

Some participating public entities are required to seek Historically Underutilized Business (HUB) vendors as defined by the Texas Comptroller of Public Accounts Statewide HUB Program. Does Vendor certify that their entity is a HUB vendor?

If you respond "Yes," you must upload current certification proof in the appropriate "Response Attachments" location.

No

3 National Coverage

Can the Vendor provide its proposed goods and services to all 50 US States?

Yes - All 50 States

4 States Served

If Vendor answered "No" to the question entitled "National Coverage," please list all states where vendor can provide the goods and services proposed directly below. Your response may dictate which potential TIPS Member customers consider purchasing your offerings.

No response

5 Description of Vendor Entity and Vendor's Goods & Services

If awarded, this description of Vendor and Vendor's goods and services will appear on the TIPS website for customer/public viewing.

TinyMobileRobots is revolutionizing precision field marking with cutting-edge robotic solutions designed to save time, enhance accuracy, and reduce labor costs. Our autonomous robots are built to deliver perfectly marked lines for sports fields, road construction, and industrial applications with minimal effort.

6 Primary Contact Name

Please identify the individual who will be primarily responsible for all TIPS matters and inquiries for the duration of the contract.

Gary Garrison

7 Primary Contact Title

Primary Contact Title

EVP US and Canada

8 Primary Contact Email

Please enter a valid email address that will definitely reach the Primary Contact.

robotbids@tinymobilerobots.com

9 **Primary Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

Please provide the accurate and current phone number where the individual who will be primarily responsible for all TIPS matters and inquiries for the duration of the contract can be reached directly.

2073327450

10 **Primary Contact Fax**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

11 **Primary Contact Mobile**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

12 **Secondary Contact Name**

Please identify the individual who will be secondarily responsible for all TIPS matters and inquiries for the duration of the contract.

Ty Wood

13 **Secondary Contact Title**

Secondary Contact Title

Marketing Manager

14 **Secondary Contact Email**

Please enter a valid email address that will definitely reach the Secondary Contact.

tw@tinymobilerobots.com

15 **Secondary Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

Please provide the accurate and current phone number where the individual who will be secondarily responsible for all TIPS matters and inquiries for the duration of the contract can be reached directly.

4045951163

16 **Secondary Contact Fax**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

17 **Secondary Contact Mobile**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

No response

18 **Administration Fee Contact Name**

Please identify the individual who will be responsible for all payment, accounting, and other matters related to Vendor's TIPS Administration Fee due to TIPS for the duration of the contract.

Rachel Letendre

19 **Administration Fee Contact Email**

Please enter a valid email address that will definitely reach the Administration Fee Contact.

rl@tinymobilerobots.com

20 **Administration Fee Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

4049058070

21 **Purchase Order and Sales Contact Name**

Please identify the individual who will be responsible for receiving and processing purchase orders and sales under the TIPS Contract.

Rachel Letendre

22 **Purchase Order and Sales Contact Email**

Please enter a valid email address that will definitely reach the Purchase Order and Sales Contact.

rl@tinymobilerobots.com

23 **Purchase Order and Sales Contact Phone**

Numbers only, no symbols or spaces (Ex. 8668398477). The system will auto-populate your entry with commas once submitted which is appropriate and expected (Ex. 8,668,398,477).

4049058070

24 **Company Website**

Company Website (Format - www.company.com)

www.tinymobilerobots.com

25 **Entity D/B/A's and Assumed Names**

You must confirm that you are responding to this solicitation under your legal entity name. Go now to your Supplier Profile in this eBid System and confirm that your profile reflects your "Legal Name" as it is listed on your W9.

In this question, please identify all of your entity's assumed names and D/B/A's. Please note that you will be identified publicly by the Legal Name under which you respond to this solicitation unless you organize otherwise with TIPS after award.

TinyMobileRobot US LLC, TinyMobileRobots US, TinyMobileRobots

26 **Primary Address**

Primary Address

1634 Cobb International Blvd NW

27 **Primary Address City**

Primary Address City

Kennesaw

28 **Primary Address State**

Primary Address State (2 Digit Abbreviation)

GA

29 **Primary Address Zip**

Primary Address Zip

30152

30 **Search Words Identifying Vendor**

Please list all search words and phrases to be included in the TIPS database related to your entity. ***Do not*** list words which are not associated with the bid category/scope (See bid title for general scope). This will help users find you through the TIPS website search function. You may include product names, manufacturers, specialized services, and other words associated with the scope of this solicitation.

Robot line painters, robotic line painters, robot line marking, autonomous line painting robot, tiny mobile robots

31 **Certification of Vendor Residency (Required by the State of Texas)**

Does Vendor's parent company or majority owner:

(A) have its principal place of business in Texas; ***or*** (B) employ at least 500 persons in Texas?

Texas Education Code Section 44.031 requires that this information be considered in evaluation for certain contracts. However, Vendor response does not affect points, scoring, or potential award.

No

32 **Vendor's Principal Place of Business (City)**

In what city is Vendor's principal place of business located?

Kennesaw

33 **Vendor's Principal Place of Business (State)**

In what state is Vendor's principal place of business located?

Georgia

34 **Vendor's Years in Business**

How many years has the business submitting this proposal been operating in its current capacity and field of work?

9

35 **Certification Regarding Entire TIPS Agreement**

Vendor agrees that, if awarded, Vendor's final TIPS Contract will consist of the provisions set forth in the finalized TIPS Vendor Agreement, Vendor's responses to these attribute questions, and: (1) The TIPS solicitation document resulting in this Agreement; (2) Any addenda or clarifications issued in relation to the TIPS solicitation; (3) All solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor's entire proposal response to the TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, accepted pricing, accepted responses to questions, and accepted written clarifications of Vendor's proposal, and; any properly included attachments to the TIPS Contract.

Does Vendor agree?

Yes, Vendor agrees

36 Minimum Percentage Discount Offered to TIPS Members on all Goods and Services (READ CAREFULLY)

Please read thoroughly and carefully as an error on your response can render your contract award unusable.

TIPS Members often turn to TIPS Contracts for ease of use and to receive discounted pricing.

What is the minimum percentage discount that you can offer TIPS Members off of all goods and service pricing (whether offered through Pricing Form 1, Pricing Form 2, or in another accepted format) that you offer? Only limited goods/services specifically identified and excluded from this discount in Vendor's original proposal may be excluded from this discount.

Vendor must respond with a percentage from 0%-100%. The percentage discount that you input below will be applied to your "Catalog Pricing", as defined in the solicitation, for all TIPS Sales made during the life of the contract. You cannot alter this percentage discount once the solicitation legally closes. You will always be required to discount every TIPS Sale by the percentage included below with the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal. If you add goods or services to your "Catalog Pricing" during the life of the contract, you will be required to sell those new items with this discount applied.

Example: In this example, you enter a 10% minimum percentage discount below. In year-one of your TIPS Contract, your published "Catalog Pricing" (website/store/published pricing) for "Tablet A" is $100 and for "Tablet Set-Up Service" is $100. In this example, you must sell those items under the TIPS Contract at the proposed 10% discounted price of: "Tablet A" - $90, "Tablet Set-Up Service" - $90. In year two of your TIPS Contract, you update your "Catalog Pricing" with the market. You add "Tablet B" to your "Catalog Pricing" for $200 and have increased the price of "Tablet A" to $110 and the price of "Tablet Set-Up Service" to $110. In this example, after the "Catalog Pricing" update, you must still sell those items under the TIPS Contract at the proposed 10% discounted price of: "Tablet A" - $99, "Tablet Set-Up Service" - $99, and "Tablet B" - $180.00.

With the exception of limited goods/services specifically identified and excluded from this discount in Vendor's original proposal, if you cannot honor the discount on all goods and items now included or which may be added in the future with certainty, then you should offer a lesser discount percentage below.

What is the minimum percentage discount that you can offer TIPS Members off of all goods and service pricing (whether offered through Pricing Form 1, Pricing Form 2, or in another accepted format) that you offer?

17%

37 Honoring Vendor's Minimum Percentage Discount

Vendor is asked in these Attribute Questions to provide a Minimum Percentage Discount offered to TIPS Members on all goods and services sold under the TIPS Contract. Points will be assigned for your response and scoring of your proposal will be affected. A "YES" answer will be awarded the maximum 10 points and a "NO" answer will be awarded 0 points.

Does Vendor agree to honor the Minimum Percentage Discount off of their TIPS "Catalog Pricing" that Vendor proposed for all TIPS Sales made for the duration of the TIPS Contract?

Yes, Vendor agrees

38 Volume and Additional Discounts

In addition to the Minimum Percentage Discount proposed herein, does Vendor ever expect and intend to offer additional, greater, or volume discounts to TIPS Members?

Point(s) may be assigned for your response in the category of "Pricing" during scoring and evaluation.

Yes

39 **"Catalog Pricing" and Pricing Requirements**

This is a requirement of the TIPS Contract and is non-negotiable.

In this solicitation and resulting contract, "Catalog Pricing" shall be defined as:

"The then available list of goods or services, in the most current listing regardless of date, that takes the form of a catalog, price list, price schedule, shelf-price or other viewable format that:

A. is regularly maintained by the manufacturer or Vendor of an item; and

B. is either published or otherwise available for review by TIPS or a customer during the purchase process;

C. to which the Minimum Percentage Discount proposed by the proposing Vendor may be applied.

If awarded on this TIPS Contract, for the duration of the contract, Vendor agrees to provide, upon request, their then current "Catalog Pricing." Or, in limited circumstances where Vendor has proposed the Percentage Mark-Up method of pricing in this proposal, proof of Vendor's "cost" may be accepted by TIPS in place of catalog pricing.

YES

40 **EXCEPTIONS & DEVIATIONS TO TIPS STANDARD TERMS AND CONDITIONS**

Vendor agrees that, if awarded, Vendor's final TIPS Contract will consist of the provisions set forth in the finalized TIPS Vendor Agreement, Vendor's responses to these attribute questions, and: (1) The TIPS solicitation document resulting in this Agreement; (2) Any addenda or clarifications issued in relation to the TIPS solicitation; (3) All solicitation information provided to Vendor by TIPS through the TIPS eBid System; (3) Vendor's entire proposal response to the TIPS solicitation including all accepted required attachments, acknowledged notices and certifications, accepted negotiated terms, accepted pricing, accepted responses to questions, and accepted written clarifications of Vendor's proposal, and; any properly included attachments to the TIPS Contract. In the event of conflict between the terms of the finalized Vendor Agreement and one of the incorporated documents the terms and conditions which are in the best interest of governmental/qualifying non-profit TIPS Members shall control at TIPS sole discretion.

If Vendor responds, "No, Vendor does not agree" to this Attribute, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration. This is the only proper way to submit proposed deviations for TIPS consideration. TIPS reserves the right to accept, decline, or modify Vendor's requested negotiated terms. For this reason, answering "No, Vendor does not agree" may ultimately delay or prevent award.

Does Vendor agree with TIPS standard terms and conditions as presented in the TIPS solicitation document (RFP, RCSP, RFQ, or other) and the TIPS Vendor Agreement document?

Yes, Vendor agrees

4.1	**TIPS Sales Reporting Requirements** **This is a requirement of the TIPS Contract and is non-negotiable.** By submitting this proposal, Vendor certifies that Vendor will properly report all TIPS sales. With the exception of TIPS Automated Vendors, who have signed an exclusive agreement with TIPS regarding reporting, all TIPS Sales must be reported to TIPS by either: (1) Emailing the purchase order or similar purchase document (with Vendor's Name, as known to TIPS, and the TIPS Contract Name and Number included) to TIPS at tipspo@tips-usa.com with "Confirmation Only" in the subject line of the email within three business days of Vendor's acceptance of the order, or; (2) Within 3 business days of the order being accepted by Vendor, Vendor must login to the TIPS Vendor Portal and successfully self-report all necessary sale information within the Vendor Portal and confirm that it shows up accurately on your current Vendor Portal statement. No other method of reporting is acceptable unless agreed to by the Parties in writing. Failure to report all sales pursuant to this provision may result in immediate cancellation of Vendor's TIPS Contract(s) for cause at TIPS' sole discretion.
4.2	**TIPS Administration Fee Requirement and Acknowledgment** **This is a requirement of the TIPS Contract and is non-negotiable.** The collection of fees by TIPS, a government entity, for performance of these procurement services is required pursuant to Texas Government Code Section 791.011 et. seq. The TIPS Administration Fee is the amount legally owed by Vendor to TIPS for TIPS Sales made by Vendor. The TIPS Administration Fee amount is typically a set percentage of each TIPS Sale legally due to TIPS, but the exact TIPS Administration Fee for this Contract is published in the corresponding RFP or RCSP document. TIPS Administration Fees are due to TIPS immediately upon Vendor's receipt of payment, including partial payment, for a TIPS Sale. By submitting a proposal, Vendor agrees that it has read, understands, and agrees to the published TIPS Administration Fee amount, calculation, and payment requirements. By submitting a proposal Vendor further confirms that all TIPS Pricing includes the TIPS Administration Fee and Vendor will not show adding the TIPS Administration Fee as a charge or line-item in any TIPS Sale.
4.3	**TIPS Member Access to Vendor Proposal & Documentation** **This is a requirement of the TIPS Contract and is non-negotiable.** Notwithstanding any other information provided in this solicitation or Vendor designation of certain documentation as confidential or proprietary, Vendor's submission of this proposal constitutes Vendor's express consent to the disclosure of Vendor's comprehensive proposal, including any information deemed confidential or proprietary, **to TIPS Members**. The proposing Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of information or documentation to TIPS Members or by TIPS Members. By submitting this proposal, Vendor certifies the foregoing.

44	**Non-Collusive Bidding Certificate** **This is a requirement of the TIPS Contract and is non-negotiable.** By submission of this proposal, the Vendor certifies that: 1) This proposal has been independently arrived at without collusion with any other entity, bidder, or with any competitor; 2) This proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other bidder, competitor or potential competitor: 3) No attempt has been or will be made to induce any other person, partnership or corporation to modify, submit, or not to submit a bid or proposal; and 4) The person signing this bid or proposal certifies that they are duly authorized to execute this proposal/contract on behalf of Vendor and they have fully informed themselves regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the bidder as well as to the person signing in its behalf;
45	**Antitrust Certification Statements (Tex. Government Code § 2155.005)** **This is a requirement of the TIPS Contract and is non-negotiable.** By submission of this bid or proposal, Vendor certifies under penalty of perjury of the laws of the State of Texas that: (1) I am duly authorized to execute this proposal/contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Vendor) identified herein; (2) In connection with this proposal, neither I nor any representative of Vendor has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15; (3) In connection with this proposal, neither I nor any representative of the Vendor has violated any federal antitrust law; (4) Neither I nor any representative of Vendor has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.
46	**Limitation on Out-of-State Litigation - Texas Business and Commerce Code § 272** **This is a requirement of the TIPS Contract and is non-negotiable.** Texas Business and Commerce Code § 272 prohibits a construction contract, or an agreement collateral to or affecting the construction contract, from containing a provision making the contract or agreement, or any conflict arising under the contract or agreement, subject to another state's law, litigation in the courts of another state, or arbitration in another state. If included in Texas construction contracts, such provisions are voidable by a party obligated by the contract or agreement to perform the work. By submission of this proposal, Vendor acknowledges this law and ***if Vendor enters into a construction contract with a Texas TIPS Member*** under this procurement, Vendor certifies compliance.

47 **Required Confidentiality Claim Form**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS provides the required TIPS Confidentiality Claim Form in the "Attachments" section of this solicitation. Vendor must execute this form by either signing and waiving any confidentiality claim, or designating portions of Vendor's proposal confidential. If Vendor considers any portion of Vendor's proposal to be confidential and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code or other law(s) and orders, Vendor must have identified the claimed confidential materials through proper execution of the Confidentiality Claim Form.
If TIPS receives a public information act or similar request, any responsive documentation not deemed confidential by you in this manner will be automatically released. For Vendor documents deemed confidential by you in this manner, TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law, including Attorney General determination and opinion.

Notwithstanding any other Vendor designation of Vendor's proposal as confidential or proprietary, Vendor's submission of this proposal constitutes Vendor's agreement that proper execution of the required TIPS Confidentiality Claim Form is the only way to assert any portion of Vendor's proposal as confidential.

48 **Non-Discrimination Statement and Certification**

This is a requirement of the TIPS Contract and is non-negotiable.

In accordance with Federal civil rights law, all U.S. Departments, including but not limited to the USDA, USDE, FEMA, are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by federal funds (not all bases apply to all programs).
Vendor certifies that Vendor will comply with applicable Non-Discrimination and Equal Opportunity provisions set forth in TIPS Member Customers' policies and other regulations at the local, state, and federal levels of governments.

☑ Yes, I certify

49 **Limitation of Vendor Indemnification and Similar Clauses**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS, a department of Region 8 Education Service Center, a political subdivision, and local government entity of the State of Texas, is prohibited from indemnifying third-parties (pursuant to the Article 3, Section 52 of the Texas Constitution) except as otherwise specifically provided for by law or as ordered by a court of competent jurisdiction. Article 3, Section 52 of the Texas Constitution states that "no debt shall be created by or on behalf of the State ... " and the Texas Attorney General has opined that a contractually imposed obligation of indemnity creates a "debt" in the constitutional sense. Tex. Att'y Gen. Op. No. MW-475 (1982). Thus, contract clauses which require TIPS to indemnify Vendor, pay liquidated damages, pay attorney's fees, waive Vendor's liability, or waive any applicable statute of limitations must be deleted or qualified with "to the extent permitted by the Constitution and Laws of the State of Texas."

Does Vendor agree?

☑ Yes, I Agree

50 **Alternative Dispute Resolution Limitations**

This is a requirement of the TIPS Contract and is non-negotiable.

TIPS, a department of Region 8 Education Service Center, a political subdivision, and local government entity of the State of Texas, does not agree to binding arbitration as a remedy to dispute and no such provision shall be permitted in this Agreement with TIPS. Vendor agrees that any claim arising out of or related to this Agreement, except those specifically and expressly waived or negotiated within this Agreement, may be subject to non-binding mediation at the request of either party to be conducted by a mutually agreed upon mediator as prerequisite to the filing of any lawsuit arising out of or related to this Agreement. Mediation shall be held in either Camp or Titus County, Texas. Agreements reached in mediation will be subject to the approval by the Region 8 ESC's Board of Directors, authorized signature of the Parties if approved by the Board of Directors, and, once approved by the Board of Directors and properly signed, shall thereafter be enforceable as provided by the laws of the State of Texas.

Does Vendor agree?

Yes, Vendor agrees

51 **No Waiver of TIPS Immunity**

This is a requirement of the TIPS Contract and is non-negotiable.

Vendor agrees that nothing in this Agreement shall be construed as a waiver of sovereign or government immunity; nor constitute or be construed as a waiver of any of the privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department. The failure to enforce, or any delay in the enforcement, of any privileges, rights, defenses, remedies, or immunities available to Region 8 Education Service Center or its TIPS Department under this Agreement or under applicable law shall not constitute a waiver of such privileges, rights, defenses, remedies, or immunities or be considered as a basis for estoppel.

Does Vendor agree?

☑ Yes, Vendor agrees

52 **Payment Terms and Funding Out Clause**

This is a requirement of the TIPS Contract and is non-negotiable.

Vendor agrees that TIPS and TIPS Members shall not be liable for interest or late-payment fees on past-due balances at a rate higher than permitted by the laws or regulations of the jurisdiction of the TIPS Member.

Funding-Out Clause: Vendor agrees to abide by the applicable laws and regulations, including but not limited to Texas Local Government Code § 271.903, or any other statutory or regulatory limitation of the jurisdiction of any TIPS Member, which requires that contracts approved by TIPS or a TIPS Member are subject to the budgeting and appropriation of currently available funds by the entity or its governing body.

Does Vendor agree?

☑ Yes, Vendor agrees

53 **Certification Regarding Prohibition of Certain Terrorist Organizations (Tex. Gov. Code 2270)**

Vendor certifies that Vendor is not a company identified on the Texas Comptroller's list of companies known to have contracts with, or provide supplies or services to, a foreign organization designated as a Foreign Terrorist Organization by the U.S. Secretary of State.

Does Vendor certify?

Yes, Vendor certifies

54	**Certification Regarding Prohibition of Boycotting Israel (Tex. Gov. Code 2271)** If (a) Vendor is not a sole proprietorship; (b) Vendor has ten (10) or more full-time employees; and (c) this Agreement or any agreement with a TIPS Member under this procurement has value of $100,000 or more, the following certification shall apply; otherwise, this certification is not required. Vendor certifies, where applicable, that neither the Vendor, nor any affiliate, subsidiary, or parent company of Vendor, if any, boycotts Israel, and Vendor agrees that Vendor and Vendor Companies will not boycott Israel during the term of this Agreement. For purposes of this Agreement, the term "boycott" shall mean and include refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory but does not include an action made for ordinary business purposes. When applicable, does Vendor certify? Yes, Vendor certifies
55	**Certification Regarding Prohibition of Contracts with Certain Foreign-Owned Companies (Tex. Gov. Code 2274)** Certain public entities are prohibited from entering into a contract or other agreement relating to critical infrastructure that would grant Vendor direct or remote access to or control of critical infrastructure in this state, excluding access specifically allowed by a customer for product warranty and support purposes. Vendor certifies that neither it nor its parent company nor any affiliate of Vendor or its parent company, is (1) owned by or the majority of stock or other ownership interest of the company is held or controlled by individuals who are citizens of China, Iran, North Korea, Russia, or a designated country; (2) a company or other entity, including governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, Russia, or a designated country; or (3) headquartered in China, Iran, North Korea, Russia, or a designated country. For purposes of this certification, "critical infrastructure" means "a communication infrastructure system, cybersecurity system, electric grid, hazardous waste treatment system, or water treatment facility." Vendor certifies that Vendor will not grant direct or remote access to or control of critical infrastructure, except for product warranty and support purposes, to prohibited individuals, companies, or entities, including governmental entities, owned, controlled, or headquartered in China, Iran, North Korea, Russia, or a designated country, as determined by the Governor. When applicable, does Vendor certify? Yes, Vendor certifies

56 **Certification Regarding Prohibition of Discrimination Against Firearm and Ammunition Industries (Tex. Gov. Code 2274)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has at least ten (10) full-time employees; and (c) this Agreement or any Supplemental Agreement with certain public entities have a value of at least $100,000 that is paid wholly or partly from public funds; (d) the Agreement is not excepted under Tex. Gov. Code 2274 and (e) the purchasing public entity has determined that Vendor is not a sole-source provider or the purchasing public entity has not received any bids from a company that is able to provide this written verification, the following certification shall apply; otherwise, this certification is not required.

Vendor certifies that Vendor, or association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary parent company, or affiliate of these entities or associations, that exists to make a profit, does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and will not discriminate during the term of this contract against a firearm entity or firearm trade association.

For purposes of this Agreement, "discriminate against a firearm entity or firearm trade association" shall mean, with respect to the entity or association, to: "(1) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; (2) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or (3) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association."

"Discrimination against a firearm entity or firearm trade association" does not include: "(1) the established policies of a merchant, retail seller, or platform that restrict or prohibit the listing or selling of ammunition, firearms, or firearm accessories; and (2) a company's refusal to engage in the trade of any goods or services, decision to refrain from continuing an existing business relationship, or decision to terminate an existing business relationship to comply with federal, state, or local law, policy, or regulations or a directive by a regulatory agency, or for any traditional business reason that is specific to the customer or potential customer and not based solely on an entity's or association's status as a firearm entity or firearm trade association."

When applicable, does Vendor certify?

Yes, Vendor certifies

57 **Certification Regarding Termination of Contract for Non-Compliance (Tex. Gov. Code 552.374)**

If Vendor is not a governmental body and (a) this Agreement or any Supplemental Agreement with a public entity has a stated expenditure of at least $1 million in public funds for the purchase of goods or services by certain public entities; or (b) this Agreement or any Supplemental Agreement results in the expenditure of at least $1 million in public funds for the purchase of goods or services by certain public entities in their fiscal year, the following certification shall apply; otherwise, this certification is not required.

As required by Tex. Gov. Code 552.374, the following statement is included in the RFP and the Agreement (unless the Agreement is (1) related to the purchase or underwriting of a public security; (2) is or may be used as collateral on a loan; or (3) proceeds from which are used to pay debt service of a public security of loan): "The requirements of Subchapter J, Chapter 552, Government Code, may apply to this solicitation and Agreement and the Vendor agrees that this Agreement and any applicable Supplemental Agreement can be terminated if Vendor knowingly or intentionally fails to comply with a requirement of that subchapter."

Pursuant to Chapter 552 of the Texas Government Code, Vendor certifies that Vendor shall: (1) preserve all contracting information related to this Agreement as provided by the records retention requirements applicable to TIPS or the purchasing TIPS Member for the duration of the Agreement; (2) promptly provide to TIPS or the purchasing TIPS Member any contracting information related to the Agreement that is in the custody or possession of Vendor on request of TIPS or the purchasing TIPS Member; and (3) on completion of the Agreement, either (a) provide at no cost to TIPS or the purchasing TIPS Member all contracting information related to the Agreement that is in the custody or possession of Vendor, or (b) preserve the contracting information related to the Agreement as provided by the records retention requirements applicable to TIPS or the purchasing TIPS Member.

When applicable, does Vendor certify?

Yes, Vendor certifies

58 **Certification Regarding Prohibition of Boycotting Certain Energy Companies (Tex. Gov. Code 2274)**

If (a) Vendor is not a sole proprietorship; (b) Vendor has ten (10) or more full-time employees; and (c) this Agreement or any Supplemental Agreement with certain public entities has a value of $100,000 or more that is to be paid wholly or partly from public funds, the following certification shall apply; otherwise, this certification is not required.

Vendor certifies that Vendor, or any wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of these entities or business associations, if any, do not boycott energy companies and will not boycott energy companies during the term of the Agreement or any applicable Supplemental Agreement.

For purposes of this certification the term "company" shall mean an organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, that exists to make a profit.

The term "boycott energy company" shall mean "without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company (a) engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law, or (b) does business with a company described by paragraph (a)." (See Tex. Gov. Code 809.001).

When applicable, does Vendor certify?

Yes, Vendor certifies

59 **Felony Conviction Notice - Texas Education Code 44.034**

Texas Education Code, Section 44.034, Notification of Criminal History, Subsection (a), states, "a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony."

Subsection (b) states, "a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract."

Subsection (c) states, "This section does not apply to a publicly held corporation.

Vendor certifies one of the following:

A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable, or;

B. My firm is not owned nor operated by anyone who has been convicted of a felony, or;

C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony.

If Vendor responds with Option (C), Vendor is required to provide information in the next attribute.

B. My firm is not owned nor operated by felon.

60 **Felony Conviction Notice - Texas Education Code 44.034 - Continued**

If Vendor selected Option (C) in the previous attribute, Vendor must provide the following information herein:

1. Name of Felon(s)

2. The Felon(s) title/role in Vendor's entity, and

3. Details of Felon(s) Conviction(s).

No response

61 **Conflict of Interest Questionnaire Requirement**

Vendor agrees that it has looked up, read, and understood the current version of Texas Local Government Code Chapter 176 which generally requires disclosures of conflicts of interests by Vendor hereunder if Vendor:

(1) has an employment or other business relationship with a local government officer of our local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of our local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of our local governmental entity.

(4) Any other financial, commercial, or familial relationship with our local government that may warrant reporting under this statute.

Does Vendor certify that it has NO reportable conflict of interest?

Yes, Vendor certifies - VENDOR HAS NO CONFLICT

62 **Conflict of Interest Questionnaire Requirement - Form CIQ - Continued**

If you responded "No, Vendor does not certify - VENDOR HAS CONFLICT" to the Conflict of Interest Questionnaire question above, you are required by law to fully execute and upload the form attachment entitled "Conflict of Interest Questionnaire - Form CIQ." If you accurately claimed no conflict above, you may disregard the form attachment entitled "Conflict of Interest Questionnaire - Form CIQ."

Have you uploaded this form if applicable?

Yes

63 **Upload of Current W-9 Required**

Vendors are required by TIPS to upload a current, accurate W-9 Internal Revenue Service (IRS) Tax Form for your entity. This form will be utilized by TIPS to properly identify your entity.

You must confirm that you are responding to this solicitation under your legal entity name. Go now to your Supplier Profile in this eBid System and confirm that your profile reflects your "Legal Name" as it is listed on your W9.

64 **Regulatory Good Standing Certification**

Does Vendor certify that its entity is in good standing will all government entities and agencies, whether local, state, or federal, that regulate any aspect of Vendor's field of work or business operations?

If Vendor selects "No", Vendor must provide explanation on the following attribute question.

Yes, Vendor certifies

65 **Regulatory Good Standing Certification - Explanation - Continued**

If Vendor responded to the prior attribute that "No", Vendor is not in good standing, Vendor must provide an explanation of that lack of good standing here for TIPS consideration.

No response

66 **Instructions Only - Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion**

Instructions for Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

1. By answering yes to the next Attribute question below, the vendor and prospective lower tier participant is providing the certification set out herein in accordance with these instructions.

2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment.

3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participants," "person," "primary covered transaction," "principal," "proposal" and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.

5. The prospective lower tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.

6. The prospective lower tier participant further agrees by submitting this form that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transaction" without modification in all lower tier covered transactions and in all solicitations for lower tier covered transactions.

7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List.

8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment.

67 **Suspension or Debarment Certification**

Read the instructions in the attribute above and then answer the following accurately.

Vendor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

Does Vendor certify?

Yes, Vendor certifies

68 **Vendor Certification of Criminal History - Texas Education Code Chapter 22**

Texas Education Code Chapter 22 requires entities that contract with school districts to provide services to obtain criminal history record information regarding covered employees. Contractors must certify to the district that they have complied. Covered employees with disqualifying criminal histories are prohibited from serving at a school district pursuant to this law.

DEFINITIONS

Covered employees: Employees of a contractor or subcontractor who have or will have continuing duties related to the service to be performed at the District and have or will have direct contact with students. The District will be the final arbiter of what constitutes direct contact with students.

Disqualifying criminal history: Any conviction or other criminal history information designated by the District, or one of the following offenses, if at the time of the offense, the victim was under 18 or enrolled in a public school: (a) a felony offense under Title 5, Texas Penal Code; (b) an offense for which a defendant is required to register as a sex offender under Chapter 62, Texas Code of Criminal Procedure; or (c) an equivalent offense under federal law or the laws of another state.

Vendor certifies:

NONE (Section A): None of the employees of Vendor and any subcontractors are covered employees, as defined above. If this box is checked, I further certify that Contractor has taken precautions or imposed conditions to ensure that the employees of Vendor and any subcontractor will not become covered employees. Contractor will maintain these precautions or conditions throughout the time the contracted services are provided under this procurement.

OR

SOME (Section B): Some or all of the employees of Vendor and any subcontractor are covered employees. If this box is checked, I further certify that: (1) Vendor has obtained all required criminal history record information regarding its covered employees. None of the covered employees has a disqualifying criminal history; (2) If Vendor receives information that a covered employee subsequently has a reported criminal history, Vendor will immediately remove the covered employee from contract duties and notify the purchasing entity in writing within 3 business days; (3) Upon request, Vendor will provide the purchasing entity with the name and any other requested information of covered employees so that the purchasing entity may obtain criminal history record information on the covered employees; (4) If the purchasing entity objects to the assignment of a covered employee on the basis of the covered employee's criminal history record information, Vendor agrees to discontinue using that covered employee to provide services at the purchasing entity.

Which option does Vendor certify?

Yes, I certify - NONE (Section A)

69	**Certification Regarding "Choice of Law" Terms with TIPS Members** Vendor agrees that if any "Choice of Law" provision is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Choice of Law" applicable to the sales agreement/contract between Vendor and TIPS Member shall be the state where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Choice of Law" clause that conflicts with these terms is rendered void and unenforceable. If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration. Does Vendor agree? Yes, Vendor agrees
70	**Certification Regarding "Venue" Terms with TIPS Members** Vendor agrees that if any "Venue" provision is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must provide that the "Venue" for any litigation or alternative dispute resolution is shall be in the state and county where the TIPS Member operates unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Venue" clause that conflicts with these terms is rendered void and unenforceable. If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration. Does Vendor agree? Yes, Vendor agrees
71	**Certification Regarding "Automatic Renewal" Terms with TIPS Members** Vendor agrees that no TIPS Sale may incorporate an "Automatic Renewal" clause that exceeds month to month terms with which the TIPS Member must comply. All renewal terms incorporated into a TIPS Sale Supplemental Agreement shall only be valid and enforceable when Vendor received written confirmation of acceptance of the renewal term from the TIPS Member for the specific renewal term. The purpose of this clause is to avoid a TIPS Member inadvertently renewing a Supplemental Agreement during a period in which the governing body of the TIPS Member has not properly appropriated and budgeted the funds to satisfy the Agreement renewal. Any TIPS Sale Supplemental Agreement containing an "Automatic Renewal" clause that conflicts with these terms is rendered void and unenforceable. If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration. Does Vendor agree? Yes, Vendor agrees

72 **Certification Regarding "Indemnity" Terms with TIPS Members**

Texas and other jurisdictions restrict the ability of governmental entities to indemnify others. Vendor agrees that if any "Indemnity" provision which requires the TIPS Member to indemnify Vendor is included in any sales agreement/contract between Vendor and a TIPS Member, that clause must either be stricken or qualified by including that such indemnity is only permitted, "to the extent permitted by the laws and constitution of [TIPS Member's State]" unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing an "Indemnity" clause that conflicts with these terms is rendered void and unenforceable.

If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

73 **Certification Regarding "Arbitration" Terms with TIPS Members**

Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause may ***not*** require that the arbitration is mandatory or binding. Vendor agrees that if any "Arbitration" provision is included in any TIPS Sale agreement/contract between Vendor and a TIPS Member, that clause provides for only voluntary and non-binding arbitration unless the TIPS Member expressly agrees otherwise. Any TIPS Sale Supplemental Agreement containing a "Arbitration" clause that conflicts with these terms is rendered void and unenforceable.
If Vendor disagrees, after this solicitation legally closes and TIPS begins evaluating Vendor's file, TIPS will provide Vendor with a draft Word Document version of the Vendor Agreement and will be instructed to include all requested negotiations as redline edits for TIPS consideration.

Does Vendor agree?

Yes, Vendor agrees

74 **2 CFR PART 200 AND FEDERAL CONTRACT PROVISIONS EXPLANATION**

TIPS and TIPS Members will sometimes seek to make purchases with federal funds. In accordance with 2 C.F.R. Part 200 of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (sometimes referred to as "EDGAR"),Vendor's response to the following questions labeled "2 CFR Part 200 or Federal Provision" will indicate Vendor's willingness and ability to comply with certain requirements which may be applicable to TIPS purchases paid for with federal funds, if accepted by Vendor.

Your responses to the following questions labeled "2 CFR Part 200 or Federal Provision" will dictate whether TIPS can list this awarded contract as viable to be considered for a federal fund purchase. **Failure to certify all requirements labeled "2 CFR Part 200 or Federal Provision" will mean that your contract is listed as not viable for the receipt of federal funds. However, it will not prevent award.**

If you do enter into a TIPS Sale when you are accepting federal funds, the contract between you and the TIPS Member will likely require these same certifications. Specifically, if Vendor utilizes the Cost-Plus Markup method anywhere in its proposal, Vendor cannot and will not be listed as federally compliant for TIPS purposes unless Vendor also certifies "Yes" in response to the Attribute entitled, "2 CFR Part 200 - Prohibition of Cost- Plus."

75 **2 CFR Part 200 or Federal Provision - Prohibition of Cost Plus**

Contracts paid with federal funds which exceed the simplified acquisition threshold currently set at $250,000 (2 CFR 200.320), which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, may not utilize a cost plus percentage of cost and percentage of cost method of contract pricing. Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members for a TIPS Sale resulting from this procurement process which exceeds the simplified acquisition threshold, Vendor shall not utilize a cost plus a percentage of cost and percentage of cost method of contract pricing for that expenditure. If Vendor fails to certify and proposes a Cost Plus Markup Method of pricing anywhere in their proposal, Vendor will **not** be listed as federally/EDGAR compliant for TIPS purposes.
Does Vendor certify?

Yes, Vendor agrees.

76 **2 CFR Part 200 or Federal Provision - Vendor Willingness to Accept Federal Funds**

This certification is not required by federal law. However, TIPS Members are public entities and qualifying non-profits which often receive federal funding and grants (ESSER, CARES Act, EDGAR, etc.) ***Accepting such funds often requires additional required certifications and responsibilities for Vendor.*** The following attribute questions include these required certifications. Your response to this questions, the following certifications, and other factors will determine whether your contract award will be deemed as eligible for federal fund expenditures by TIPS Members.

If awarded, is Vendor willing to accept payment for goods and services offered under this contract paid for by a TIPS Member with federal funds?

Yes

77 **2 CFR Part 200 or Federal Provision - Contracts**

Contracts for more than the simplified acquisition threshold currently set at $250,000 (2 CFR § 200.320), which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Notice: Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserve all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

Does vendor agree?

Yes, Vendor agrees

78 **2 CFR Part 200 or Federal Provision - Termination**

Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of $10,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserve the right to terminate any agreement in excess of $10,000 resulting from this procurement process for cause after giving the vendor an appropriate opportunity and up to 30 days, to cure the causal breach of terms and conditions. ESC Region 8 and TIPS Members reserve the right to terminate any agreement in excess of $10,000 resulting from this procurement process for convenience with 30 days notice in writing to the awarded vendor. The Vendor would be compensated for work performed and goods procured as of the termination date if for convenience of the ESC Region 8 and TIPS Members. Any award under this procurement process is not exclusive and the ESC Region 8 and TIPS reserves the right to purchase goods and services from other vendors when it is in the best interest of the ESC Region 8 and TIPS.

Does vendor agree?

Yes, Vendor agrees

79	**2 CFR Part 200 or Federal Provision - Clean Air Act** Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of $150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Pursuant to the Clean Air Act, et al above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members require that the proposer certify that during the term of an award by the ESC Region 8 and TIPS Members resulting from this procurement process the vendor agrees to comply with all of the above regulations, including all of the terms listed and referenced therein. Does vendor agree? Yes, Vendor agrees
80	**2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment** Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding $100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award. Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members require the proposer certify that during the term and during the life of any contract with ESC Region 8 and TIPS Members resulting from this procurement process the vendor certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). Does Vendor agree? Yes, Vendor agrees

81 **2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment - Continued**

Applicable to Grants, Subgrants, Cooperative Agreements, and Contracts Exceeding $100,000 in Federal Funds

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

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

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

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "disclosure Form to Report Lobbying," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all covered subawards exceeding $100,000 in Federal funds at all appropriate tiers and that all subrecipients shall certify and disclose accordingly.

Does Vendor certify that it has NOT lobbied as described herein?

Yes, Vendor certifies - NO Reportable Lobbying

82 **2 CFR Part 200 or Federal Provision - Byrd Anti-Lobbying Amendment - Continued**

If you answered "No, Vendor does not certify - Lobbying to Report" to the above attribute question, you must download, read, execute, and upload the attachment entitled "Disclosure of Lobbying Activities - Standard Form - LLL", as instructed, to report the lobbying activities you performed or paid others to perform.

83 **2 CFR Part 200 or Federal Provision - Federal Rule**

Compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15). (Contracts, subcontracts, and subgrants of amounts in excess of $100,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members requires the proposer certify that in performance of the contracts, subcontracts, and subgrants of amounts in excess of $250,000, the vendor will be in compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).

Does vendor certify compliance?

Yes, Vendor certifies

84	**2 CFR Part 200 or Federal Provision - Procurement of Recovered Materials** A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include: (1) procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; (2) procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines. Does vendor certify that it is in compliance with these provisions? Yes, Vendor certifies
85	**2 CFR Part 200 or Federal Provision - Rights to Inventions** If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency. Pursuant to the above, when the foregoing applies to ESC Region 8 and TIPS Members, Vendor certifies that during the term of an award resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in the Federal rule above. Does vendor certify? Yes, Vendor certifies

86 **2 CFR Part 200 or Federal Provision - Domestic Preferences for Procurements and Compliance with Buy America Provisions**

As appropriate and to the extent consistent with law, TIPS Member Customers, to the greatest extent practicable under a Federal award, may provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). Vendor agrees that the requirements of this section will be included in all subawards including all contracts and purchase orders for work or products under this award, to the greatest extent practicable under a Federal award. For purposes of 2 CFR Part 200.322, "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stag through the application of coatings, occurred in the United States. Moreover, for purposes of 2 CFR Part 200.322, "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum, plastics and polymer-based products such as polyvinyl chloride pipe, aggregates such as concrete, glass, including optical fiber, and lumber.

Vendor certifies that it is in compliance with all applicable provisions of the Buy America Act. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition. For purposes of 2 CFR Part 200.322,

"Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

"Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that to the greatest extent practicable Vendor will provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products).

Does Vendor Certify?

Yes, Vendor certifies

87 **2 CFR Part 200 or Federal Provision - Ban on Foreign Telecommunications**

ESC 8 and TIPS Members are prohibited from obligating or expending Federal financial assistance, to include loan or grant funds, to: (1) procure or obtain, (2) extend or renew a contract to procure or obtain, or (3) enter into a contract (or extend or renew a contract) to procure or obtain, equipment, services, or systems that use "covered telecommunications" equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. "Covered telecommunications" equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities), and physical security surveillance of critical infrastructure and other national security purposes, and video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities) for the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes detailed in 2 CFR § 200.216.

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that Vendor will not purchase equipment, services, or systems that use "covered telecommunications", as defined by 2 CFR §200.216 equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

Does vendor certify?

Yes, Vendor certifies

88

2 CFR Part 200 or Federal Provision - Contract Cost & Price

For contracts more than the simplified acquisition threshold currently set at $250,000, a TIPS Member may, in very rare circumstances, be required to negotiate profit as a separate element of the price pursuant to 2 C.F.R. 200.324(b). Under those circumstances, Vendor agrees to provide information and negotiate with the TIPS Member regarding profit as a separate element of the price. However, Vendor certifies that the total price charged by the Vendor shall not exceed the Vendor's TIPS pricing and pricing terms proposed.

Does Vendor certify?

Yes, Vendor certifies

89

2 CFR Part 200 or Federal Provision - Equal Employment Opportunity

Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members on any federally assisted construction contract, the equal

opportunity clause is incorporated by reference here.

Does Vendor Certify?

Yes, Vendor certifies

90

2 CFR Part 200 or Federal Provision - Davis Bacon Act Compliance

Texas Statute requires compliance with Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146- 3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non- Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

Pursuant to state and federal requirements, Vendor certifies that it will be in compliance with all applicable Davis-Bacon Act provisions if/when applicable.

Does Vendor certify?

Yes, Vendor certifies

91	**2 CFR Part 200 or Federal Provision - Contract Work Hours and Safety Standards** Where applicable, all contracts awarded by ESC 8 and TIPS Members in excess of $100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, Vendor certifies that during the term of an award for all contracts resulting from this procurement process, Vendor will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act. Does Vendor certify? Yes, Vendor certifies
92	**2 CFR Part 200 or Federal Provision - FEMA Fund Certification & Certification of Access to Records** **If and when** Vendor accepts a TIPS purchase paid for in full or part with FEMA funds, Vendor certifies that: (1) Vendor agrees to provide the TIPS Member, the FEMA Administrator, the Comptroller General of the United States, or any of their authorized representatives access to and rights to reproduce any books, documents, papers, and records of the Contractor which are directly pertinent to this contract, or any contract resulting from this procurement, for the purposes of making audits, examinations, excerpts, and transcriptions. This right also includes timely and reasonable access to Vendor's personnel for the purpose of interview and discussion relating to such documents. Vendor agrees to provide the FEMA Administrator or an authorized representatives access to construction or other work sites pertaining to the work being completed under the contract. Vendor acknowledges and agrees that no language in this contract or the contract with the TIPS Member is intended to prohibit audits or internal reviews by the FEMA Administrator or the Comptroller General of the United States. (2) The Vendor shall not use the Department of Homeland Security's seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre-approval. (3) The Vendor will comply with all applicable Federal law, regulations, executive orders, FEMA policies, procedures, and directives. (4) The Federal Government is not a party to this contract and is not subject to any obligations or liabilities to the non-Federal entity, contractor, or any other party pertaining to any matter resulting from the contract. (5) The Vendor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the Vendor's actions pertaining to this contract. Does Vendor certify? Yes, Vendor certifies
93	**2 CFR Part 200 or Federal Provision - Certification of Compliance with the Energy Policy and Conservation Act** When appropriate and to the extent consistent with the law, Vendor certifies that it will comply with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq; 49 C.F.R. Part 18) and any state mandatory standards and policies relating to energy efficiency which are contained in applicable state energy conservation plans issued in compliance with the Act. Does Vendor certify? Yes, Vendor certifies

94 **2 CFR Part 200 or Federal Provision - Certification of Compliance with Never Contract with the Enemy**

Where applicable, all contracts awarded by ESC 8 and TIPS Members in excess of $50,000.00, within the period of performance, and which are performed outside of the United States, including U.S. territories, are subject to the regulations implementing Never Contract with the Enemy in 2 CFR part 183. Per 2 CFR part 183, in the situation specified, ESC 8 and TIPS Members shall terminate any contract or agreement resulting from this procurement which violates the Never Contract with the Enemy regulation in 2 CFR part 183, including if Vendor is actively opposing the United States or coalition forces involved in a contingency operation in which members of the the Armed Forces are actively engaged in hostilities. Vendor certifies that it is neither an excluded entity under the System for Award Management (SAM) nor Federal Awardee Performance and Integrity Information System (FAPIIS) for any contract terminated due to Never Contract with the Enemy as a Termination for Material Failure to Comply.

Does Vendor certify?

Yes, Vendor certifies

95 **2 CFR Part 200 or Federal Provision - Certification of Compliance with EPA Regulations**

For contracts resulting from this procurement, in excess of $100,000.00 and paid for with federal funds, Vendor certifies that Vendor will comply with all applicable standards, orders, regulations, and/or requirements issued pursuant to the Clean Air Act of 1970, as amended (42 U.S.C. 1857(h)), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15.

Does Vendor certify?

Yes, Vendor certifies

96 **2 CFR Part 200 or Federal Provision - Record Retention Requirements**

For contracts resulting from this procurement, paid for by ESC 8 or TIPS Members with federal funds, Vendor certifies that Vendor will comply with the record retention requirements detailed in 2 CFR § 200.334. Vendor certifies that Vendor will retain all records as required by 2 CFR § 200.334 for a period of three years after final expenditure or financial reports, as applicable, and all other pending matters are closed.

Does Vendor certify?

Yes, Vendor certifies

97 **2 CFR Part 200 or Federal Provision - Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms.**

Do you ever anticipate the possibility of subcontracting any of your work under this award if you are successful?

If you respond "Yes", you must respond to the following attribute question accurately. If you respond "No", you may skip the following attribute question.

NO

98 **2 CFR Part 200 or Federal Provision - If "Yes" Response to Above Attribute - Continued - Subcontracting and Affirmative Steps for Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms.**

Only respond to this question if you responded "Yes" to the attribute question directly above. Skip this question if you responded "No" to the attribute question directly above.

Does Vendor certify that it will follow the following affirmative steps? Federal Regulation 2 CFR §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms. (a)The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

(1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce ; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs(1) through (5) of this section.

Does Vendor certify?

No response

99 **ACKNOWLEDGMENT & BINDING CORPORATE AUTHORITY**

By submitting this proposal, the individual(s) submitting on behalf of the Vendor certify that they are authorized by Vendor to complete and submit this proposal on behalf of Vendor and that this proposal was duly submitted on behalf of Vendor by authority of its governing body, if any, and within the scope of its corporate powers.

Vendor further certifies that it has read, examined, and understands all portions of this solicitation including but not limited to all attribute questions, attachments, solicitation documents, bid notes, and the Vendor Agreement(s). Vendor certifies that, if necessary, Vendor has consulted with counsel in understanding all portions of this solicitation.

Greenfield-Central High School

810 N Broadway, Greenfield, IN 46140 | Phone: (317) 462-9211 | Fax: (317) 462-6723

Greenfield-Central High School
810 N Broadway St
Greenfield, IN 46140

Re: Reference Letter for TinyMobileRobots

To whom it may concern:

Greenfield Central High School became a Tiny Mobile Robot user over a year ago. During this time we have been extremely pleased with the ease of use, customer service and overall time savings that we have experienced. We have, and will continue to express our support of Tiny Mobile Robots machines to anyone and everyone who is in the market for an autonomous field painting robot.

Thank you,

Jared M. Manning, CAA
Athletic Director
Greenfield-Central High School

Jared Manning, CAA
Athletic Director

Elizabeth Mercer, RAA
Assistant Athletic Director

Katie Brown
Athletic Department Secretary

Fairbanks High School

11158 OH-38
Milford Center, OH 43045
937-349-3721

Logan Dunn, Athletic Director
Email: logandunn@fairbankspanthers.org
Phone: 937-349-9000 ext.1310

January 10, 2025

To Whom It May Concern:

Please accept this reference for TinyMobileRobots who provided a robot painter to Fairbanks Local Schools.

TinyMobileRobots provided the Tiny Line Maker Pro-X in 2024. We understand that they have submitted an assignee application to the TIPS-USA Cooperative Purchasing Program. Fairbanks Local Schools is a customer of TinyMobileRobots. They performed satisfactorily and we would do business with them again. As a customer of the TinyMobileRobots, we would highly recommend Tiny Mobile Robots to TIPS public entities and non-profit members.

Please feel free to contact me at 937-349-9000 (ext. 1310) or logandunn@fairbankspanthers.org

Sincerely,

Logan Dunn

Fairbanks Athletic Director

Doug Kegerreis

City of Northglenn

12301 Claude Ct.

Northglenn, CO, 80241

February 14, 2025

I am writing to recommend the product TinyMobileRobot. The City of Northglenn has been using the autonomous robot for the past 3 years to assist with marking athletic fields. By not only freeing up a person to complete other tasks while the robot paints, it offers more benefits to the city. The robot painter uses ¾ less paint than the traditional Grayco sprayer previously used. A tablet with hundreds of pre-programmed fields from which to choose was provided along with the robot painter. Having the ability at our fingertips to reorient fields with the push of a button is one of the biggest time savers with the whole operation. The ability to modify and create any dimensions of field size needed by the user-friendly program application provided is a great asset.

I am happy to recommend the Tiny Mobile Robot. If you have any questions, feel free to contact me.

Douglas Kegerreis
Parks Supervisor
City of Northglenn

P:303-280-7810 C:720-315-6623

dkegerreis@northglenn.org

12301 Claude Ct. Northglenn CO 80241

CITY OF Northglenn

TIPS CONTRACT 250106

REQUIRED CONFIDENTIALITY CLAIM FORM

(VENDOR MUST COMPLETE THE FOLLOWING VENDOR INFORMATION)

Vendor Entity Name: TinyMobileRobots

Vendor Authorized Signatory Name: Drew Carl

Vendor Authorized Signatory Title: Marketing Director

Vendor Authorized Signatory Email: robotbids@tinymobilerobots.com

Vendor Address: 1634 Cobb International Blvd NW

City: Kennesaw State: GA Zip Code: 30152

Vendor agrees that it is voluntarily providing its data (including but not limited to: Vendor information, Vendor documentation, Vendor's proposal, Vendor pricing submitted or provided to TIPS, TIPS contract documents, TIPS correspondence, Vendor logos and images, Vendor's contact information, Vendor's brochures and commercial information, Vendor's financial information, Vendor's certifications, and any other Vendor information or documentation submitted to TIPS by Vendor and its agents) (Hereinafter, "Vendor Data") to TIPS. Vendor understands and agrees that TIPS is a government entity subject to public information laws including but not limited to Texas Government Code (TGC) Chapter 552. Vendor agrees that regardless of confidentiality designations herein, Vendor's submission of a proposal constitutes Vendor's consent to the disclosure and release of Vendor's Data and comprehensive proposal, including any information deemed confidential or proprietary herein, to and by TIPS Members.

Notwithstanding the foregoing permissible release to TIPS Members, if Vendor considers any portion of Vendor's proposal to be otherwise confidential and not subject to public disclosure pursuant to public information laws, including but not limited to TGC Chapter 552, Vendor must properly execute ***Option 1 only*** below, attach to this PDF all documents and information that Vendor deems confidential, and upload the consolidated documentation. Regardless of the Option selected below, this form must be completed and uploaded to the "Response Attachments" section of the eBid System entitled "Required Confidentiality Claim Form." Execution and submission of this form is the sole indicator of whether Vendor considers any Vendor Data confidential in the event TIPS receives a request, a Public Information Request, or subpoena. If TIPS receives a request, any responsive documentation not deemed confidential by you through proper execution of Option 1 of this form will be automatically released. For information deemed confidential by you through proper execution of Option 1 of this form, TIPS will follow procedures of controlling statute(s) regarding withholding that documentation and shall not be liable for any release of information required by law, including Attorney General opinion or court order.

(VENDOR MUST COMPLETE ONE OF THE TWO OPTIONS AND UPLOAD IN THE EBID SYSTEM)

OPTION 1 – DESIGNATING CONFIDENTIAL MATERIALS – YES, VENDOR HAS ATTACHED CONFIDENTIAL MATERIALS

(Confirm each bullet point and sign below)

- Vendor claims some Vendor Data confidential to the extent permitted by TGC Chapter 552 and other applicable law.
- Vendor attached to this PDF all potentially confidential Vendor Data and listed the number of attached pages below.
- Vendor's authorized signatory has signed below and shall upload this document in the proper location in the eBid System.
- Vendor agrees that TIPS shall not be liable for any release of confidential information required by law.

Number of pages attached deemed confidential: _____

Authorized Signature: _____

OPTION 2 – WAIVER OF CONFIDENTIALITY – NO, VENDOR HAS NOT ATTACHED CONFIDENTIAL MATERIALS

(Confirm each bullet point and sign below)

By signing for Option 2 below, Vendor expressly waives any confidentiality claim for all Vendor Data submitted in relation to this proposal and resulting contract. Vendor confirms that TIPS may freely release Vendor Data submitted in relation to this proposal or resulting contract to any requestor. Vendor agrees that TIPS shall not be responsible or liable for any use or distribution of Vendor Data by TIPS or TIPS Members.

- Vendor's authorized signatory has signed below and shall upload this document in the proper location in the eBid System.
- Vendor agrees that TIPS shall not be liable for any release of confidential information required by law.

Authorized Signature: 

a Division of First Western Bank & Trust
100 Prairie Center Drive
Eden Prairie, MN 55344

Date: March 12, 2026

Knox County, TN
2447 Sutherland Ave.
Knoxville, TN 37919

RE: Document Checklist for Agreement No. **14123801KMS**
For the Equipment being acquired through: **TinyMobileRobots US LLC**

It is my pleasure to provide the documents for your recent approval.

- **Insurance Requirements: Self Insured**
- **Lease Agreement** – please have **Authorized Signer with Title** complete as directed.
- **U.S. Patriot Act** – Complete as indicated.
- **Payment Withdrawal Form** – The last page of the document set, Authorization for Automatic Payment Withdrawal, **needs to be completed for the upfront payment.** You can then choose to continue making payments electronically or request monthly invoices. If you choose to submit a check, please note that the check will be processed electronically using the information provided.
- **Municipal Addendum**- please complete as indicated.
- **Lease Domicile Addendum** – please complete as indicated.
- **Payment Schedule**- please complete as indicated.
- **Accounts Payable Form** – please complete as indicated.

If you have any questions, please contact me direct (888) 705-0567 or melissa.leucafiranek@firstwesternef.com. We appreciate this opportunity to serve you!

Regards,
Melissa LeucaFiranek
Account Manager

First Western Equipment Finance
Financing Made Simple.

Lessee: **Knox County, TN**

2447 Sutherland Ave.

Knoxville, TN 37919

LEASE AGREEMENT
#: 14123801KMS

a division of First Western Bank & Trust
100 Prairie Center Drive
Eden Prairie, MN 55344
P #: (800) 288-5088 F #: (800) 288-4959

Rev. 8/23/2023

EQUIPMENT DESCRIPTION: (4) TinyMobileRobots Pro X Razor And Accessories
EQUIPMENT LOCATION: 2447 Sutherland Ave, Knoxville TN 37919
SELLER: TinyMobileRobots US LLC

Term:	72	**Base Payment Amount:**	$30,777.42	**Advance Payment(s):**	$30,777.42
Number of Payments:	6	**Applicable Sales/Use Taxes:**	Exempt	**Documentation Fee:**	$150.00
Payments to be Made:	Annual	**Total Payment:**	$30,777.42		
PURCHASE OPTION:	$1 Buy Out			**Total Due in Advance:**	**$30,927.42**

ADDITIONAL PROVISIONS: See Equipment supplier's invoice for Equipment information

Lease Agreement and Fees: You (the Lessee specified above) want to acquire the above Equipment from Seller. You want Us, First Western Equipment Finance A Division of **First Western Bank & Trust** ("Lessor", "We", "Our") to buy the Equipment and then lease it to You. This Lease Agreement ("Lease") will begin on the date the Lease is accepted by Us. You and We are making this Lease at the Lessor's Headquarter Address. You will make all Payments to the Payment Address below or other address that We may designate in writing. By signing this Lease, You have accepted the delivered Equipment, (or You have completed an alternate form provided by Us, certifying acceptance of the delivered Equipment). We may charge You a reasonable Documentation Fee to cover Our documentation and investigation costs. **No Warranty**: We are leasing the Equipment to You "**AS IS".** We do not manufacture the Equipment and are not related to the Seller or manufacturer, nor do We have any agency, joint venture or partnership relationship with the Seller or the Manufacturer. You selected the Equipment and the Seller, based on Your own judgment. You may contact the Seller for a statement of the warranties, if any, that the Seller or manufacturer is providing. We hereby assign to You the warranties given to Us, if any. **WE MAKE NO WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, IN CONNECTION WITH THIS LEASE.** You agree to settle any dispute You may have regarding performance of the Equipment directly with the manufacturer or Seller. **Equipment Use and Repair: YOU AGREE THE EQUIPMENT WILL BE USED FOR BUSINESS PURPOSES ONLY AND NOT FOR PERSONAL, FAMILY OR HOUSEHOLD PURPOSES**. You are responsible for keeping the Equipment in good working order. Except for normal wear and tear, You are responsible for any damage or loss to the Equipment. The primary domicile of the equipment ("Equipment Location") is stated above. We may inspect the Equipment and/or receive a report from You as to the current location upon our request. **At End of Lease Term**: If You have not defaulted under this Lease, You will: a) purchase the Equipment from Us, **"AS IS, WHERE IS",** for the Purchase Option or b) **Surrender** the Equipment to Us. This Lease will automatically renew at the Base Payment Amount until the Equipment is purchased from Us or is surrendered to Us. **Ownership, Title and UCC'S:** Except for any software covered by this Lease We are the owner of the Equipment and have title to it. **WE MAY FILE ON YOUR BEHALF, AND AT YOUR COST, UNIFORM COMMERCIAL CODE (UCC) FINANCING STATEMENT(S) TO SHOW OUR INTEREST IN THE EQUIPMENT**. **Loss and Insurance:** You will, for as long as We own the Equipment, maintain property insurance on the Equipment fully insuring against all risks of loss and will maintain a general public liability insurance policy covering the Equipment and its use with coverages acceptable to Us. You will name Us as loss payee and an additional named insured and provide Us with evidence of this insurance. If You do not provide property insurance, We may, at our option, attempt to obtain property insurance to protect our interests. In connection with Us obtaining property insurance, You will pay us an increase in the Base Payment Amount to recover our costs . **Default:** If You do not pay any sum by its due date, or You breach any other term of this Lease or any other agreement with Us, then You will be in default of this Lease. If You default, We may require that You pay 1) all past due amounts under this Lease, and 2) declare immediately due and payable the entire unpaid balance owed under this Lease, , the same thereupon be immediately due and payable without demand or notice of any kind, all of which are expressly waived by You . Upon a default, We may, without limiting Our other remedies hereunder or by law, also choose to repossess the Equipment. If We do not choose to repossess the Equipment,. **Miscellaneous:** Any change must be in writing and signed by each party. Notice, if required, will be sent to you at the above address. We may accept an electronic or PDF copy of this Lease as an original. **The signer below covenants that he or she has the authority to sign this Lease Agreement on behalf of the Lessee. Miscellaneous: You authorize us and our agents and assignees to obtain credit reports and make credit inquiries about you and disclose your information, including credit applications, payment histories and account information, to our affiliates on a "need to know" basis and to credit reporting agencies, our assignees and potential assignees, and other parties having an economic interest in this agreement or the Equipment.**

Do not write in this space		**Lessee:**	**Knox County, TN**	
Lessor:	Date	**By/Title**	**X**	/
			Signature	Title

Lessor's Headquarter Address: 900 S. Broadway, Minot, ND 58701
Payment Address: P.O. Box 2068, Minot, ND 58702-2068

U.S. Patriot Act Form

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT

When you apply for an account with us, we will ask for your name, address, date of birth and other information that will allow us to identify you. We will ask to see your driver's license or other identifying documents.

In accordance with the **U.S. Patriot Act** the following items need to be completed by all signers and guarantors:

CORPORATIONS, LLC'S, LLP'S PLEASE PROVIDE FEDERAL TAX ID NO. _____

First Western Equipment Finance
Financing Made Simple.

a division of First Western Bank & Trust

MUNICIPAL ADDENDUM

To be made a part of a certain Equipment Lease # **14123801KMS** between, Knox County, TN ("Lessee") and First Western Equipment Finance a division of First Western Bank & Trust ("Lessor").

Lessee shall have the right to terminate this Lease at the end of any fiscal year of Lessee only if adequate funds are not appropriated to continue this Lease (known as **NON- APPROPRIATIONS**) as evidenced by the passage of an ordinance or resolution specifically prohibiting the Lessee from performing its obligations under this agreement with respect to any Equipment, and from using any moneys to pay any Lease payments due under this Agreement for a designated Fiscal Year and all subsequent Fiscal Years.

The Lessee or Lessee's governing body has appropriated and/or taken other lawful actions necessary to provide moneys sufficient to pay all Lease payments during the Fiscal Year in which payments begin, and such moneys will be applied in payment of all Rentals due and payable during such current Fiscal Year.

The Lessee agrees to include in the budget request for each Fiscal Year the Lease payments to become due during such Fiscal Year, and will use all reasonable and lawful means available to secure the appropriation of money for such Fiscal Year sufficient to pay all Lease Payments coming due therein. The Lessee reasonably believes that moneys in an amount sufficient to make all Lease payments can and will lawfully be appropriated and made available to permit Lessee's continued utilization of the Equipment in the performance of its essential functions during the applicable Lease term. Lessor acknowledges that appropriation for Lease payments is a governmental function which the Lessee cannot contractually commit itself in advance to perform. Lessee acknowledges that this agreement does not constitute such a commitment.

Lessee may effect such termination by giving Lessor written notice thirty (30) days prior to such termination and by paying to Lessor any Lease payments, which are due and have not been paid at, or before, the end of its then current fiscal year. In the event of termination of this Lease, Lessee shall return the equipment to Lessor, in accordance with the terms within the Lease Agreement, in good working condition within fifteen (15) days after termination of this Lease.

If Lessee has not delivered possession of the Equipment to Lessor and conveyed to Lessor or released its interest in the Equipment within fifteen (15) days after termination of this Lease, the termination shall nevertheless be effective, but Lessee shall be responsible for the payment of damages in an amount equal to the amount of the Lease payments thereafter coming due which are attributable to the number of days after termination during which the Lessee fails to take such actions.

The Lessee represents that Lessee qualifies as a State or political subdivision of a State for purposes of Section 103(a) of the Code. **Lessee will file the appropriate Internal Revenue Service (IRS) Form 8038-G or 8038-GC**. If Lessee does not properly file the above IRS form on a timely basis; or IRS rules that the Lessee does not qualify under Section 103(a) of the Code, then Lessee will pay Lessor, on demand, a sum to be determined by Lessor, that will return to Lessor the economic results Lessor would otherwise have received.

This agreement shall be exclusively construed, governed, and controlled by the Laws of the State of Tennessee without regard to principles of law, including conflicts of law, of any other jurisdiction, territory, country, and/or province. Any dispute arising out of or relating to this agreement shall exclusively be brought in the Chancery Court or the Circuit Court of Knox County, Tennessee. Each party consents to personal jurisdiction thereto and waives any defenses based on personal jurisdiction, venue and inconvenient forum.

Lessee: Knox County, TN	Lessor: First Western Equipment Finance a division of First Western Bank & Trust
By: _____	By: _____
Title: _____	Title: _____
Date: _____	Date: _____

First Western Equipment Finance
Financing Made Simple.

a division of First Western Bank & Trust

CERTIFICATION OF EQUIPMENT DOMICILE

The undersigned, as Lessee on Agreement # **14123801KMS** hereby certifies that, for the express purpose of establishing any obligation with regard to reimbursement of Personal Property Tax to **First Western Equipment Finance** a division of First Western Bank & Trust (Lessor), the Equipment listed on the Agreement is delivered to and is domiciled at the following address(es) Street:_____

City:_____ State:_____ Zip:_____,

located in the county(s) of _____ .

Lessee Name: **Knox County, TN**

By: _____

Print Name: _____

Title: _____

Date: _____

Contact Email for Questions:

_____

First Western Equipment Finance
Financing Made Simple.

PAYMENT SCHEDULE

This Payment Schedule is hereby made a part of a certain Lease Agreement, # 14123801KMS (the "Lease") between:

First Western Equipment Finance a division of First Western Bank & Trust (Lessor) and Knox County, TN(Lessee)

The Lessee shall make payments to the Lessor in the amounts and according to the schedule shown below:

Beginning with the first payment due upon commencement and remaining payments due Annually thereafter:

1 Advance payment	**$30,777.42**
5 Annual payments	**$30,777.42**

Lessee: Knox County, TN

By: _____

Authorized Signer Title

First Western Equipment Finance
Financing Made Simple.

100 Prairie Center Drive
Eden Prairie, MN 55344

March 12, 2026

INVOICE

Invoice #: 1115327

Lessee: Knox County, TN

Lease Agreement # 14123801KMS

Equipment: (4) TinyMobileRobots Pro X Razor And Accessories

Initial Payment	$30,777.42
One time documentation fee:	$150.00
Total due immediately:	**$30,927.42**

Please remit total due via completed EFT form, along with required signed documents.

First Western Equipment Finance
Financing Made Simple.

a Division of First Western Bank & Trust

AUTHORIZATION FOR AUTOMATIC PAYMENT WITHDRAWAL

Date: March 12, 2026

Business: **Knox County, TN**
Agreement Number: 14123801KMS

I hereby authorize First Western Equipment Finance to debit my account at the Financial Institution listed below to cover the payments as stated in the following contract:
Note: Please check the applicable box(es) for each action

YES NO

☐ ☐ **Initial payment** in the amount of **$30,927.42** (amount includes documentation fee)

- By selecting "Yes" I understand that First Western Equipment Finance may adjust my EFT deduction to account for any increases to Sales Tax portion of total payment as defined by local jurisdiction. Any changes to initial payment amount will be conveyed with amendment letter notification.

☐ ☐ **Regular payments** in the amount of **$30,777.42**

- By selecting "Yes" I understand that First Western Equipment Finance may adjust my EFT deduction to account for other assessed charges to my contract which include but are not limited to, Business Personal Property Tax, Return Item Fees, Insurance Premiums, or any other items that are payable as defined under the contract terms.

☐ ☐ Send me an invoice for remaining payments.

I may terminate this authorization by notifying First Western Equipment Finance, in writing, of our desire to terminate the authorization.

Bank Name: _____ Bank Phone # _____

Bank Routing Number: _____ Account Number: _____

Frequency: Annual Account Type: Checking: ☐ Savings: ☐

Please include a voided check with this authorization form

Authorized Signer (print): _____

Authorized Signature of Account Owner: _____

Authorized Signer Title: _____

Date: _____

First Western Equipment Finance
Financing Made Simple.

a division of First Western Bank & Trust

ACCOUNTS PAYABLE FORM

Knox County, TN(Customer)

Lease Agreement, # 14123801KMS

Contact Information for Billing & Accounts Payable

- **Name:** _____
- **Job Title:** _____
- **Direct Tel:** _____
- **Tel 2:** _____
- **Bill-To Address:** _____
- **Email Address:** _____
- **Purchase Order Number:** _____

Contact 2 (if available)

- **Name:** _____
- **Job Title:** _____
- **Direct Tel:** _____
- **Tel 2:** _____
- **Fax:** _____
- **Email Address:** _____

Invoice Billing Preference (Only Select One):

Mail: ☐

E-Mail: ☐

Additional Information: _____

RLA-18256 **R-26-3-706**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Katie Huneycutt, PARKS AND RECREATION
Department:	PARKS AND RECREATION
Requires Expenditure of Funds:	NO Funded in Current Budget: NO
Appropriation Required:	YES

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a revised Memorandum of Understanding with the National Recreation and Park Association (NRPA) for the acceptance of grant funds in the amount of $20,000.00 and $89,580.00 as an in-kind donation for the provision of youth sports activities and programming. (No local match required) **(TO BE ADDED)**

(Parks and Recreation)

Attachments

Resolution

Agreement

NRPA Youth Sports Access Grant Application

NRPA Youth Sports Access Grant Award Notification

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A REVISED MEMORANDUM OF UNDERSTANDING WITH THE NATIONAL RECREATION AND PARK ASSOCIATION (NRPA) FOR THE ACCEPTANCE OF GRANT FUNDS IN THE AMOUNT OF $20,000.00 AND $89,580.00 AS AN IN-KIND DONATION FOR THE PROVISION OF YOUTH SPORTS ACTIVITIES AND PROGRAMMING. (NO LOCAL MATCH REQUIRED)

RESOLUTION: **R-26-3-706**

REQUESTED BY: **PARKS AND RECREATION**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, by means of Resolution R-26-2-701, the Knox County Commission (the "Commission") approved a Memorandum of Understanding with the National Recreation and Park Association for the acceptance of grant funds in the amount of $20,000.00 and $89,580.00 as an in-kind donation for the implementation of the 2026 NRPA Youth Sports Access Grant Program to provide youth sports activities and programming; and

WHEREAS, the Memorandum of Understanding was revised by the parties after the Commission's approval; and

WHEREAS, in view of these changes, a revised Memorandum of Understanding has been submitted to the Commission for approval.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The revised Memorandum of Understanding with the National Recreation and Park Association for the acceptance of grant funds in the amount of $20,000.00 and $89,580.00 as an in-kind donation for the implementation of the 2026 NRPA Youth Sports Access Grant Program is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the revised Memorandum of Understanding with the National Recreation and Park Association for the acceptance of grant funds in the amount of $20,000.00 and $89,580.00 as an in-kind donation for the implementation of the 2026 NRPA Youth Sports Access Grant Program shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

NATIONAL
RECREATION AND PARK
ASSOCIATION

MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (MOU), entered into as of the date of the last signature affixed hereto (Effective Date), is made between National Recreation and Park Association, Incorporated, a New York not-for-profit corporation and Section 501(c)(3) organization located at 22377 Belmont Ridge Road, Ashburn, Virginia, 20148 ("NRPA" or "Grantor") and Knox County Parks and Recreation, a provider of park, recreation, or community services located at 2447 Sutherland Ave. in Knoxville, TN ("Grantee") .

1. Purpose

The purpose of this MOU is to confirm approval of the terms governing the acceptance and use of twenty thousand dollars ($20,000) ("Grant Funds") made available to Grantee for the implementation of the 2026 NRPA Youth Sports Access Grant Program ("Project").

Made possible through the support of Musco Lighting, NRPA is managing the administration of the grant program ("Program"). Grant Funds are intended to support local park and recreation agencies and community-based organizations as they advance equitable access to youth sports.

Having been selected as a recipient of Grant Funds through this Program, Grantee is required to accept the terms contained within this MOU in order to receive the Grant Funds and participate in this Project.

1. Project Funding

Grantee will receive a total of twenty thousand dollars ($20,000) over the full grant period. Within thirty (30) days upon execution of this MOU and delivery to NRPA, NRPA will send Grantee a check in the amount of twenty thousand ($20,000.00). Grant Funds will be distributed by NRPA, no matching funds are required, and it is expressly understood that the NRPA has no obligation to provide additional support or funds to the Grantee for this Project or any other project of purposes.

Grantee will work with NRPA to finalize project budget by March 15, 2026. NRPA must be notified of any changes made to the finalized project budget if they are greater than 10% of the project costs.

2. Grantee Requirements

Grantee will use the grant funds to:

- **A.** Advance equitable access to youth sports through the activities identified in the original grant proposal: including activities related to the activation of the donated lighting/pitch consistent with the grantee's original proposal at the John Tarleton Park.
  Changes to these activities must be provided to NRPA in writing for approval.
- **B.** Participate in final project interviews in Summer 2027 to discuss progress related to the activities listed above.
- **C.** Participate in the learning community and all learning community activities.
- **D.** Collaborate with NRPA to assess the impact of the implemented strategy (or strategies). Methods of assessment could include sharing program metrics, surveys, focus groups and/or interviews with local park and recreation professionals, youth, parents, coaches, and/or other local stakeholders.
- **E.** Share stories, photos, videos, and written content with NRPA to promote project impacts.
- **F.** If selected, host a site visit for NRPA during the project period.
- **G.** Complete the project by June 30, 2027

- Final reports are due to NRPA on this date.

3. Promotion

NRPA and Musco Lighting may use Grantee's name and/or park names, photos, and/or information in connection with the Project for promotional or other purposes associated with the Project, in any and all media, without limitation and without further payment, notification, or permission, except where prohibited by law. If the Grantee's photo release form does not cover promotional and other uses, NRPA can provide one upon request.

NRPA also grants Grantee a limited, non-exclusive, and royalty-free license to use NRPA's name, trademark, logos, and other identifying marks ("Licensed Marks") for promotional or other purposes associated with the Project, unless prohibited by law. NRPA shall have the right to review and approve the use of the Licensed Marks, as well as any and all related promotional and advertising material, in order to ensure that the use of the Licensed Marks meets NRPA's quality assurance standards.

Grantee shall provide NRPA an opportunity to review and approve any statement or message related to this grant or Project in advance of its release to the public. Any promotion, public announcement, annual report or promotion relating to the Grant Funds or Project shall be subject to the prior review and approval of the National Recreation and Park Association and Musco Lighting.

All Parties shall retain all title, ownership, rights, and intellectual property rights in their own respective marks, logos, content, materials, tools and intellectual property. Under no circumstance will any Party to this MOU use another Party's Licensed Marks in a false, misleading, or disparaging manner. Upon completion of the Project, Parties shall, at their own expense, return all copies Licensed Marks to their respective owners beyond what is necessary for record-keeping purposes.

4. Limits of Liability

To the extent allowed by applicable law, Grantee hereby release NRPA and Musco Lighting, and each of their directors, officers, managers, members, employees, agents, attorneys, advisors, consultants, volunteers and other like parties (collectively the "Support Parties"), from any liability whatsoever relating to or arising out of the Project or the use of the Grant Funds by Grantee or its subgrantees. In no event shall the Support Parties be liable for any punitive, exemplary, special, incidental, indirect or consequential damages of any kind (including, but not limited to loss of profits, loss of reputation and/or loss of current or prospective business advantage, even where such losses are characterized as direct damages) arising out of or in any way related to the relationship and/or dealings between the parties, regardless of whether the claim under which damages are sought is based upon contract, tort, negligence (except as set forth below), strict liability or otherwise, and regardless of whether the parties have been advised of the possibility of such damages at the time of contracting or otherwise. This limitation of liability shall apply except to the extent the liability is caused by Support Parties' gross negligence or intentional misconduct.

NRPA's liability, if any, arising out of or in any way related to the relationship and/or dealings between NRPA and Grantee, shall be limited to the payment amounts paid pursuant to this MOU. NRPA shall not be liable for any damages caused by or arising out of the acts or omissions of a third party.

5. Indemnification

To the extent allowed by applicable law, Grantee shall indemnify, defend and hold harmless the Support Parties from any and all causes of action, suits, settlements, judgments, liens, indebtedness, damages, losses, costs, expenses, fees (including attorney's fees and costs), penalties, claims, claims for relief, liabilities and demands of every kind, nature, and character (collectively, "Claims") relating to or arising out of: (i) Grantee's involvement in the development, planning, demolition, construction, installation, implementation, maintenance, repair and/or management of the Project; (ii) any failure by Grantees to comply with any applicable laws, rules and/or regulations (including, without limitation, building, safety and fire codes, etc.); (iii) Grantee's negligence, misconduct, or malfeasance of Grantee or their agents or representatives; or (iv) any breach by Grantee of any agreement involving the Project or the use of the Grant Funds. In such cases where Grantee's obligation to indemnify may be limited due to the requirements of federal, state, or local laws, Grantee shall only be required to indemnify the Support Parties as may be allowed by law. In addition, Grantee shall be responsible for the ordinary negligent acts and omissions of Grantee's agents and employees causing harm to persons not a Party to this MOU.

To the extent allowed by applicable law, NRPA shall indemnify, defend and hold harmless the Grantee from any and all third party Claims relating to or arising out of: (i) any failure by NRPA to comply with any applicable laws, rules and/or regulations; or (ii) NRPA's gross negligence or intentional misconduct. In such cases where NRPA's obligation to indemnify may be limited due to the requirements of federal, state, or local laws, NRPA shall only be required to indemnify the Grantee as may be allowed by law.

6. Confidentiality

During the term of this MOU, the Parties may learn certain Confidential Information of each other. For purposes of this MOU, "Confidential Information" means the confidential and proprietary information, not generally known by non-party personnel, used by the disclosing party and which is proprietary to the disclosing party, and includes, without limitation, the disclosing party's trade secret or proprietary personnel, financial, marketing and business information, including strategic, operations and other business plans or forecasts, and Confidential Information provided by the disclosing party regarding its employees, customers, vendors, sponsors and other contractors. The receiving party shall: (i) protect and safeguard the confidentiality of the disclosing party's Confidential Information with at least the same degree of care as the receiving party would protect its own Confidential Information, but in no event with less than a commercially reasonable degree of care; (ii) not use the disclosing party's confidential information, or permit it to be accessed or used, for any purpose other than to exercise its rights or perform its obligations under this MOU; and (iii) not disclose any such Confidential Information to any person, except to the receiving party's officers, employees, consultants, accountants, and legal advisors who are bound by written confidentiality obligations and have a need to know the Confidential Information to assist the receiving party, or act on its behalf, to exercise its rights or perform its obligations under this MOU.

7. Term

This MOU shall be effective as of the Effective Date hereof and shall continue until June 30, 2027 (the "Term") unless earlier terminated as set forth in Section 11.

8. Use of Grant Funds

The Grantee shall use the full amount of the Grant Funds exclusively for the purposes set forth in Section 1. Unless otherwise agreed in writing by the Grantor, the Grantee shall return any portion of the Grant Funds and the income earned thereon that is not expended for such purposes in accordance with Section 11.

All unspent or uncommitted Grant Funds shall be protected (such as invested in an interest-bearing bank account) with the primary objective being preserving the Grant Funds availability for the Project. Any interest or other income generated by the Grant Funds must be applied to the purposes described in the Grant Project.

The Grantee agrees not to use any portion of the Grant Funds or any income derived from the Grant Funds for the following:

A. To carry on propaganda or otherwise attempt to influence legislation within the meaning of Section 4945(d)(1) of the Internal Revenue Code of 1986, as amended (the Code);
B. To influence the outcome of any specific public election or to carry on, directly or indirectly, any voter registration drive within the meaning of Section 4945(d)(2) of the Code;
C. To provide a grant to an individual for travel, study, or similar purpose within the meaning of Section 4945(g) of the Code, without prior written approval of Grantor.
D. Except as expressly may be authorized in the approved Project, to provide a grant to any other organization without prior written approval of the Grantor; or
E. To promote or engage in the following, but not limited to, acts that would create civil liability, criminal acts, criminal acts of violence, terrorism, hate crimes, the destruction of any state, or discrimination on the basis of race, national origin, religion, military and veteran status, disability, sex, age, or sexual orientation, or support of any entity that engages in these activities.
F. To travel to NRPA's Annual Conference or any other conference travel without written approval from Grantor.

9. Audit

Grantee is expected to keep and maintain detailed books and records relating to the Grant, and the Grant Funds (including, without limitation, all uses thereof and expenditures therefrom) (collectively, the "Records") during the Term and for a period of not less than seven (7) years thereafter (the "Audit Period"). NRPA and its assigns have the right to audit the Grantees' financial records relating to this MOU upon not less than ten (10) business days' advance written notice to Grantees by NRPA at any time during the Audit Period, at NRPA's sole expense (except as noted below), during Grantee's normal business hours. If as a result of an audit, NRPA determines that Grant Funds were not spent in accordance with the purposes of this Grant, the Grantees shall: (1) be required to return any Grant Funds not substantiated, and (2) reimburse NRPA for all costs and expenses incurred in connection with such audit. If NRPA determines that Grant Funds were used for fraudulent purposes, the Grantees shall be barred from participation in any further programs. Grantees shall further indemnify, defend, and hold the Support Parties harmless from any acts or omissions relating to its fraudulent use of the Grant Funds.

10. Termination and Repayment

Either party may terminate this MOU at any time effective upon receipt of written notice by the other party of failure to perform and such failure to perform is not cured within thirty (30) days of receipt of notice of such failure. In the event that this MOU is terminated for any reason, Grantee shall promptly repay to NRPA any portion of the Grant Funds not already spent (subject to and in accordance with all of the terms and conditions hereof) as of the effective date of such termination.

None of the Parties shall be liable to the other by reason of termination of this MOU for compensation, reimbursement or damages for any loss of prospective profits on anticipated sales or for expenditures, investments, leases or other commitments relating to the business or goodwill of any of the parties, notwithstanding any law to the contrary. No

termination of this MOU shall release the obligation to pay any sums due to the terminating party which accrued prior to such termination.

12. **Compliance with Laws.**
Grantee will comply in full with all applicable federal, state, and local laws and regulations and rules of governmental agencies and bodies relating to Grantee's acceptance and use of the Grant Funds, including those that govern gifts, donations, contributions, expenditures, and anything else of value that benefit, directly or indirectly, public officials. Grantee agrees to notify Grantor immediately: (a) of any conduct on Grantee's part that may be in violation of any applicable federal, state and local laws and (b) if Grantee receives notice of, or otherwise becomes aware of, any actual or threatened investigation, action, litigation, or disciplinary or other proceeding of which Grantee is or may be a subject in connection with the Grant Funds and to the extent permitted by applicable law, shall provide Grantor with all written notices and communications received by Grantee relating to or any such investigation, action, litigation, or disciplinary proceeding.

13. Governing Law, Jurisdiction, Venue and Dispute Resolution
This MOU and the performance thereof shall be governed, interpreted, construed and regulated by the law of the State of Tennessee, without reference to or application of principles concerning conflicts of laws of any jurisdiction. Before commencing any litigation arising out of or relating to the relationship of the parties, this MOU, or the breach hereof, the parties agree to negotiate in good faith to resolve such dispute within fifteen (15) business days of notice by the other party of such dispute. Should the parties fail to mutually resolve their dispute and commence litigation, the parties hereby irrevocably consent to venue before the federal and state courts situated in Knox County, Tennessee and each party hereby irrevocably submits to the jurisdiction of such courts.

14. No Agency; Relationship of the Parties
Each party and their respective officers, employees, agents, contractors and/or consultants are independent contractors and are not, nor shall they hold themselves out to as or claim to be, employees or agents of the other party or any department, agency or unit thereof; accordingly, neither party shall have any authority to enter into any agreement on behalf of the other party or otherwise cause the other party to incur any obligations whatsoever other than as set forth herein.

15. Notices
All notices, requests, demands and other communications required or permitted under this MOU must be in writing and will be deemed to have been duly given, made and received only (a) when personally delivered, or (b) on the date specified for delivery when deposited with an overnight courier service such as Federal Express for delivery to the intended addressee, or (c) when sent via facsimile, only so long as followed by a hard copy sent in a manner set forth in (a) or (b) above, or (d) when delivered via email, only so long as followed by a hard copy sent in a manner set forth in (a) or (b) above, each of the foregoing addressed as set forth below:

If to Grantee, to:
Knox County Parks and Recreation
2447 Sutherland Ave.
Knoxville, TN 37919
Attn: Katie Huneycutt, Administrative Coordinator
Email: katie.huneycutt@knoxcounty.org

NATIONAL
RECREATION AND PARK
ASSOCIATION

If to NRPA, to:
National Recreation and Park Association
22377 Belmont Ridge Road
Ashburn, VA 20148
Attn: Kent Hunt, Program Manager
Email: khunt@nrpa.org

16. **Entire Agreement.**
This MOU supersedes any and all agreements, either oral or written, between the parties hereto with respect to the subject matter covered herein and contains all of the covenants and agreements between the parties with respect to the Grant purpose and Project in any manner whatsoever. Each party to this MOU acknowledges that no representations, inducements, promises, or agreements, orally or otherwise, have been made by any party, or anyone acting on behalf of any party, which is not embodied herein, and that no other agreement, statement, or promise not contained in this MOU shall be valid or binding. Any modification of this MOU will be effective only if it is in writing signed by the parties hereto. Any changes, additions or deletions to this MOU, including the Project, must be approved in writing by all the parties. This MOU and all amendments may be signed in counterparts, each of which will constitute one and the same document. Any signature delivered via facsimile or other electronic means shall be deemed an original signature to this MOU. The section headings contained in this MOU are for reference purposes only and shall not affect in any way the meaning or interpretation of this MOU.

17. Severability.
If any term, covenant, or condition of this MOU or the application thereof to any person or circumstance shall, to any extent, be invalid or unenforceable, the remainder of this MOU, or the application of such term, covenant, or condition to persons or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected thereby, and each and every remaining term, covenant, or condition of this MOU shall be valid and enforced to the fullest extent permitted by law.

SIGNATURE PAGE TO FOLLOW

NRPA

NATIONAL
RECREATION AND PARK
ASSOCIATION

These parties have caused this MOU to be signed by their duly authorized representatives as of the last date set forth below.

National Recreation and Park Association

By: _____

Printed Name: _____

Title: _____

Date: _____

Knox County Parks and Recreation

By: _____

Printed Name: Glenn Jacobs

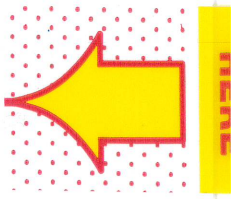
Title: Mayor

Date: _____

Contract No.: 26-076

APPROVED AS TO LEGAL FORM

Knox County Law Director 3/2/2026 Date



Application: 23428

Knox County Parks and Recreation

Started at: 9/10/2025 01:36 PM - Finalized at: 10/10/2025 10:57 AM

Page: Program Description

Background & Program Overview

When kids play sports, we all win. Research shows that when children play sports, they increase their chances to grow up healthy, feel good about themselves, build friendships, develop skills like teamwork and respect, and are more likely to succeed in school and in their future careers. As one of the largest providers of youth sports and youth development services in the nation, reaching more than 40 million youth each year, park and recreation professionals are catalysts for youth sports access in communities nationwide. Through the Youth Sports Access Grant Program, NRPA and Musco Lighting seek to partner with local park and recreation agencies to increase access to youth sports.

As part of the grant program, agencies will receive funding to address barriers to participating in youth sports, increase access to youth sports, and improve the quality of youth sports opportunities across the community.

Based on its work with previous youth sports cohorts, NRPA has created the Youth Sports Framework (https://www.nrpa.org/our-work/Three-Pillars/health-and-well-being/youth-sports-framework/) with proven potential to increase access to youth sports. Agencies can propose utilizing project funding to implement any of the strategies included in the framework, with a focus on activating their installed infrastructure. Alternatively, agencies may also propose strategies not included within the framework, focused on increasing access to sport. Applicants will be required to describe their proposed infrastructure program activation and its connection to advancing youth sports access in depth in their application. Read more about the 2023 cohort here (https://www.nrpa.org/blog/youth-sports-equity-grant-year-one-roundup/), the 2024 cohort here (https://www.nrpa.org/blog/creating-a-brighter-future-through-equitable-access-to-youth-sports/), and the 2025 cohort here (https://new.express.adobe.com/webpage/CZx5VXm3zGITv).

NRPA will host a learning community across current youth sports grants that prioritizes peer learning and networking. The learning community will provide opportunities for structured education, while focusing on sharing successes, challenges, and trends related to youth sports across all grantees. NRPA looks forward to collecting input from agencies in the learning community to determine what format would be most beneficial for these sessions.

Availability of Funds

- Grant amount: $20,000 in cash funds per grant
  - Total amount of funding available: $140,000 in cash funds
  - Number of grants to be awarded: 7 grants total
- In addition to cash funding, awarded agencies can request $50k to $100k in support of an in-kind infrastructure donation from Musco Lighting. NRPA will allocate funding based on requests made by awarded agencies. Agencies can select between the installation of Musco Lighting infrastructure to increase distribution of accessible lighting across the community, or installation of a Mini-Pitch System.
  - Agencies will be required to obtain a quote from Musco Lighting (https://www.musco.com/partners/nrpa/), and propose a plan for installing and activating their selected infrastructure as part of the application process.

Goals

- NRPA and Musco Lighting seek to partner with local park and recreation agencies to address barriers to participating in youth sports, increase access to youth sports, and improve the quality of youth sports opportunities across the community.
- Through this program, NRPA will also facilitate technical assistance to help agencies drive sustained progress toward ensuring all youth can access sports programs and facilities in local parks and recreation.

Eligibility Guidelines

Agency Eligibility

- The applicant must be a local government agency that plans, builds, and/or operates parks (e.g., municipal park and recreation department, tribal recreation department, park district, public works department that manages parks, etc.) OR an affiliated 501c(3) non-profit organization (e.g., youth sports nonprofit that partners with a local P&R agency).
    - If the applicant is not a local government agency, the applicant is required to submit a letter of support from the park and recreation agency director or equivalent.

Project Eligibility

- Based on its work with previous youth sports cohorts, NRPA has created the Youth Sports Framework (https://www.nrpa.org/our-work/Three-Pillars/health-and-well-being/youth-sports-framework/) with proven potential to increase access to youth sports. Agencies can propose utilizing project funding to implement any of the strategies included in the framework, with a focus on activating their installed infrastructure.
    - Examples of activities may include:
        - These activations can be youth-focused events, or something more specific, such as launching a youth advisory council to program the space, launching a new sports league, or hosting coach training at the infrastructure location.
    - If they choose, agencies may also propose strategies not included in this list aimed at increasing youth sports access.
- Projects should address barriers to participating in youth sports, increase access to youth sports, and improve the quality of youth sports opportunities across the community.
    - Applicants will be required to provide quantitative/qualitative data verifying that their project will benefit youth who experience barriers to participating in sports or accessing youth sports opportunities.

Other

Participation in the learning community is a critical component of this grant. Agencies must demonstrate capacity and interest to:

- Shape the direction of the learning community, and
- Actively participate and contribute to all activities.

To build rapport among learning community participants, we are asking that each agency identify a primary and secondary person to participate and attend each session. Agencies are expected to send both representatives to all learning community sessions.

Exemplary Applicant

In addition to submitting a project that prioritizes the installation and activation of infrastructure increasing access to youth sports for their communities, an exemplary applicant will demonstrate a desire to identify and select communities in need of upgraded or new sports facilities. By installing and activating these spaces, these new programs will increase youth sports access across their community. NRPA acknowledges we are all on a journey related to learning and understanding historical investments, and NRPA is looking to award agencies committed to continued learning and action to break down barriers to access for youth sports, ultimately making play accessible for all kids. Exemplary projects will also prioritize community engagement and elevate strategies to incorporate community and/or youth voice in the proposed spending of funds and the selection of the in-kind donation.

Grant Deliverables

- **Youth Sports Access Project**: The project period for the grant will be January 2026 – June 30, 2027. Awarded agencies will have until June 30, 2027 to install their in-kind infrastructure donation and activate the infrastructure installation using any of the strategies designed to increase access to youth sports for their communities.
- **Learning Community:** Grantees will participate in a learning community that supports project implementation and identify solutions that break down challenges for access to youth sports and play in their community. The community will prioritize peer networking and dialogue.
    - NRPA will work with grantees to determine the format and structure of the learning community. Grantees are expected to participate in all engagements related to the learning community to complete their grant fulfillment requirements
- **Evaluation**: NRPA will partner with awarded agencies to evaluate the impact of their installed infrastructure and strategies used to activate the space.
    - NRPA staff will check-in with grantees quarterly for updates on infrastructure installation
    - Methods of assessment could include observations, surveys, and focus groups and/or interviews with local park and recreation professionals, youth, parents, coaches, and/or other community stakeholders
    - Agencies will participate in baseline, quarterly, and final data collection activities as well as a short follow-up call approximately 6-12 months following the end of the grant period

Grant Requirements

- Participate in quarterly project update calls
- Participate in all Learning Community activities
- Collaborate with NRPA to assess the impact of the implemented strategy (or strategies).
    - Methods of assessment could include surveys, focus groups and/or interviews with local park and recreation professionals, youth, parents, coaches, and/or other local stakeholders
    - Agencies will participate in baseline, quarterly, and final data collection activities as well as a short follow-up call approx. 6-12 months following the end of the grant period
- Infrastructure installation and activation project must be completed by June 30, 2027
    - Final reports are due to NRPA on this date

Review Process

NRPA will review and consider all applications in alignment with NRPA's Grantmaking Policy, which aims to ensure that funding opportunities sponsored by NRPA positively benefit communities, particularly communities that have historically experienced disinvestment by government and philanthropy, by investing in and championing the park and recreation profession as a catalyst of positive change and overall well-being.

To support this grant, NRPA's grantmaking team will create a diverse panel of qualified reviewers. NRPA will support reviewers by hosting reviewer training that details grant goals and requirements, reviews the scoring rubric, and addresses questions regarding the review process. NRPA will use the criteria outlined in the Youth Sports Access Grant Scoring Rubric (https://www.dropbox.com/scl/fi/g5jtjz86dhmiy8vzh9e6q/2026-Youth-Sports-Access-RFP-Rubric.pdf?rlkey=n954ku17gkti4gujlmb9wbwle&st=d0ehv7f1&dl=0) to judge applications.

In-Kind Donation Information

Option 1: Musco Lighting System

Up to $100K Value in Kind (VIK) applied as a discount towards a new or retrofit Musco lighting system. Lighting can help extend hours of play and encourage positive activities after dark. The system is covered by a long-term warranty – 25 years for new installations and 10 years for retrofit – with guaranteed light levels, all parts and labor included, the Control-Link® control and monitoring system with remote scheduling, and 24/7 support from our Control-Link Central Team. A budget estimate from Musco and balance of fully installed project funds are required. The full cost of a lighting project varies due to factors like field size, location and light level requirements. Owners will be responsible for material and installation costs exceeding $100K.

Option 2: Mini-Pitch™ System

Up to $100K Value in Kind (VIK) towards a mini pitch system, ideal for transforming abandoned and underutilized areas into places that allow for inclusive play. The original concept was designed for soccer but can support multi-sport options. The grant covers a complete system up to 50'x104' installed by Musco, including lighting with remote on/off control via Control-Link and acrylic or tile surfacing. The package also includes signage for advertising/fundraising opportunities and youth programming options through U.S. Soccer Foundation's Soccer for Success program (https://ussoccerfoundation.org/programs/soccer-for-success/). Owners will be responsible for providing a concrete or asphalt pad if necessary and bringing power to the site for the lighting system. Here's an example of how this solution helps create an inclusive and accessible place for multi-sport play at Camp Courageous (https://www.youtube.com/watch?v=Xp3QvF3BFEk).

All applicants will be required to submit a quote from Musco Lighting as part of the application process. You may request your project quote from Musco Lighting here (https://www.musco.com/partners/nrpa/). Please direct any questions about the in-kind donation to Brittany Clarahan at Musco Lighting at brittany.clarahan@musco.com (mailto:brittany.clarahan@musco.com).

Timeline and Important Dates

Applications are due **October 10, 2025** at **11:59 PM PST**.

Date	Activity
August 29, 2025	RFP release date
September 9, 2025	Informational webinar
October 10, 2025	Proposals due to NRPA
January 15, 2026	NRPA to notify agencies of award status (NRPA will notify all applicants)
February 2026	Learning Community kickoff (program will run through June 2027)
January 2026 – June 2027	Awarded agencies to install infrastructure and implement youth sports access strategies to activate chosen infrastructure projects
Ongoing	Awarded agencies to participate in quarterly check-ins
Ongoing	NRPA and awarded agencies to evaluate implemented strategies
June 30, 2027	Infrastructure installation and project activation deadline
June 30, 2027	Final report due to NRPA
August 2027	Final interviews with NRPA team
December 2027/January 2028	Follow-up survey

Questions/FAQs

NRPA has created a list of FAQs here (https://www.dropbox.com/scl/fi/iw9y1kx6d0d0hwl3kfv49/2026-Youth-Sports-Access-FAQ.pdf?rlkey=a1ji0sajb3pc6rqu5gezm5pzn&st=cql9t4t4&dl=0). If you have any questions or need additional assistance, please email youthsports@nrpa.org (mailto:youthsports@nrpa.org). NRPA will host a webinar on September 9, 2025 at 1:00 p.m. Eastern Time to answer questions before completed grant applications are due. Please register for the informational webinar here (https://nrpa-org.zoom.us/meeting/register/UyameszBRUGOc47ju4KILQ). A recording of the webinar will be made available.

Page: General Information

Completing the Application

To help you fill out this form, NRPA allows multiple people to work on a single application. If you want to invite a colleague or multiple colleagues to help you complete your application, click the **Manage Collaborators** button at the top-right of this form. From there, you will be able to add collaborators (all you need is their name and valid e-mail address). Remember that your application can only be submitted by the individual who started it. You may also revoke a collaborator's access at any time using the same menu.

Multimedia Submissions

Applicants can submit parts of the application in written, video, or voice recording forms. These are clearly marked on each question. We encourage applicants to use the methods they feel most comfortable using but note that some questions require a written response. The video and voice recordings should clearly answer all components of each question. However, creativity is welcome. All methods of response will be equally scored during the review process without preference given to any one method. Examples of video or voice recordings could include interview style with stakeholders (municipal or community partners, community members, park and recreation professionals, etc.), a story-telling format with images, clips, or descriptions of project focus areas (like a podcast), or a multimedia presentation.

You can complete the entire application in writing or partially written and media. All written components must be submitted through this online application. If you are submitting a partial media application, you must provide written statements to those questions where indicated. For all media question responses, you must indicate the questions covered through media response – this could simply be a sentence "Answered in the video" or "Answered in the attached podcast." There will be space at the end of the application to upload all media files. **Multimedia submissions should not exceed 20 total minutes combined**. Partial media applications must cover all points of each question. All applications, written or partial media, will be judged equally without preference to one method.

Regardless of written, video or voice recorded submissions, a complete application must be submitted through NRPA's online grant application system. **Applications are due by October 10th at 11:59 PM PST,** and NRPA anticipates notifying applicants on or before January 15, 2026.

Agency Name

Knox County Parks and Recreation

Agency Address

2447 Sutherland Ave., Knoxville, TN 37919

Eligibility

We are a local, municipal or regional government agency

Grant Contact Name

Katie Huneycutt

Grant Contact Email

katie.huneycutt@knoxcounty.org

Page: In-Kind Infrastructure Donation

Infrastructure Selection

Mini Pitch

Mini-Pitch System

Yes, the current site has an asphalt pad. It is currently an underutilized auxiliary parking lot. The dimensions are 130' x 65'.

Mini-Pitch System

Yes, there is a loading area near the site.

Quote Upload

Download File (https://nrpa-grants.secure-platform.com/file/27584/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoyNzU4NCwiYWxsb3dOb3RTaWduZWRVcmwiOiJGYWxzZSIsImlnbm9psPh2mOln6qoZ9lOxQagQQrdAEDFedWYAJHxozo?KCPR%20NRPA%20Grant%20%20Mini-Pitch%20Budget%20Estimate.pdf)

Funding Support

100,000

Infrastructure Address

3207 Division St., Knoxville, TN 37919

Current Use and Condition

The current space is a small parking lot at John Tarleton Park. It is used as an auxiliary parking lot, but is not needed or used for large events.

Installation Plan

We have a sports and recreation and maintenance department that is fully staffed with experienced professionals in their fields. These professionals will be able to oversee and install the project from start to finish. Our sports and recreation team has staff members dedicated only to John Tarleton Park, and this new infrastructure would be added to their routine maintenance plans.

Installation Timeline

Our agency is taking a collaborative, cross-departmental approach to ensure the successful installation of the mini-pitch system by June 30, 2027. Our maintenance and sports and recreation departments have worked in tandem to assess the site and plan for installation. Our maintenance team will lead the physical installation, while the sports and recreation team will support with layout planning and equipment integration. The administration team will handle all documentation, permits, scheduling, and vendor communications to ensure smooth coordination and compliance with all requirements. Regular interdepartmental meetings will be scheduled to monitor progress, address potential delays, and ensure alignment on timelines and responsibilities.
We are committed to beginning the installation as soon as materials arrive and conditions allow. With all departments engaged early and consistently throughout the process, we are confident in our ability to complete installation before the June 30, 2027, deadline. This united effort ensures both the timely execution and long-term sustainability of the mini-pitch system for our community.

Anticipated Challenges

While we do not anticipate any major challenges with the installation of our selected infrastructure, we recognize that weather conditions may pose a potential risk to the project timeline. Inclement weather could temporarily delay site preparation or installation activities.
Beyond weather-related concerns, we are confident in our capacity to carry out the project efficiently. Our agency is fully staffed across all relevant departments. Each team is prepared and aligned to support the project from installation through programming and long-term maintenance.

Future Costs

Yes, our organization has budgeted for the ongoing maintenance and operational costs associated with the new infrastructure, including lighting and additional utility expenses. We currently have dedicated line items within our existing budget that will support year-round maintenance, programming, and utility needs for the facility. These funds will ensure that the mini-pitch system remains in excellent condition and continues to serve the community effectively well beyond installation. Our facilities and recreation teams are already equipped with the resources and staffing to manage regular upkeep and support safe and consistent usage.

Permitting and Governance

No, additional permitting or governance is not required at this time.

Electrical Service

Yes, the site is currently a fully operational park and sports complex that has electrical on-site. The voltage is 240/120 volts.

Page: Activating the Infrastructure Space

Rationale

We believe that adding a Musco Mini-Pitch System will greatly enhance our park system by expanding access to diverse sports and recreational opportunities for both youth and adults year-round. This innovative space promotes active lifestyles, community engagement, and skill development while making efficient use of available space. The Mini-Pitch will provide an inclusive environment that supports soccer and other recreational activities, helping us further our mission to create healthy, active, and connected communities across Knox County. Currently, no park or facility in Knox County has a mini-pitch system.

Proposed Project

Knox County Parks & Recreation proposes to use the $20,000 NRPA grant to fully activate a newly installed Musco Mini-Pitch system, transforming an underused asphalt parking lot into a vibrant, year-round community recreation hub. This project aligns with NRPA's Youth Sports Framework by supporting child-centered programming, coach-driven engagement, and community participation.

Installation Plan:
Our team will carry out preparatory work beginning in December to ensure the Mini-Pitch is installed efficiently and safely. This includes:
December 1st – January 1st: Sweeping, cleaning, and prepping the existing asphalt lot to ensure it's ready for immediate installation once materials arrive. Temporary fencing will be placed to block off the site and ensure safety during setup.
No permitting is required, and the existing asphalt lot is structurally ready to support the facility.
January 1st: Our electrical team will coordinate and install all necessary hook-ups to the existing power source for lighting and any other system needs.
February – March: In-house teams will assemble and install the Musco Mini-Pitch system. Leveraging our internal staff reduces costs and allows for quality control throughout the build.

Activation Plan: Once installed, the Mini-Pitch will serve as a multi-functional recreational space that is inclusive, accessible, and community-driven. Starting in Quarter 2, the facility will host a diverse lineup of programs targeting youth, adults, and families:
Quarter 2: Youth Soccer Clinics in partnership with AYSO Regions and an Adaptive Soccer Clinic will launch the pitch's programming, ensuring inclusive and skill-based development opportunities.
Quarter 3: We will expand with Open Play for youth and adults, Adult Pick-Up Soccer, and a Youth 5v5 Soccer Tournament. These low-barrier activities promote wellness, recreation, and community cohesion.
Quarter 4: Holiday-themed 5v5 tournaments for both youth and adults will create festive engagement and attract new participants to the space.

Long-Term Community Engagement: Beyond scheduled programming, we will offer Community Access Hours—designated free play times that allow equitable use by all residents. This supports unstructured play, exploration, and social interaction, particularly for underserved communities.

We are also developing Youth Development Leagues and Pop-Up Camps/Events in collaboration with local schools, sports clubs, and nonprofits. These partnerships will drive outreach, broaden participation, and deepen community ownership of the space.

Knox County Parks & Recreation staff, along with volunteers and coaches trained under NRPA's youth sports principles, will lead programming. These efforts ensure high-quality, developmentally appropriate coaching and foster a safe, welcoming environment. This grant will enable us not only to install a high-quality recreation facility but also to activate it with meaningful, inclusive programming that reflects and serves the Knox County community. With strong partnerships, intentional planning, and a focus on sustainability, the Musco Mini-Pitch will become a lasting asset for public health, youth development, and community connection.

Project Team Capacity

Knox County Parks & Recreation will lead the program activation through a collaborative team that includes our dedicated Adult and Youth Sports Departments. These departments will work together to design, implement, and oversee a variety of new recreational opportunities centered around the Musco Mini-Pitch system. Guided by the National Recreation and Park Association's Youth Sports Framework and its three pillar values —Child-Centered, Coach-Driven, and Community Engaged—our team will ensure that all programming promotes health, inclusion, and lifelong participation in sports.
The project will be coordinated by our Sr. Sports Operations Manager, who will serve as project lead, supported by site supervisors, maintenance staff, and community partners such as local schools, youth organizations, and sports clubs. Each partner will contribute to outreach, volunteer recruitment, and program development to ensure the Mini-Pitch becomes a hub for year-round activity.

Community Need

John Tarleton Park serves as a central hub for youth sports in Knox County, offering five multi-use fields for youth football, soccer, and flag football. However, its current hours and field infrastructure limit opportunities, especially as daylight wanes and demand increases. The proposed Musco Mini-Pitch System will dramatically increase usable hours through high-quality lighting, enabling evening and low-light play safely and reliably. This means more time for youth to participate in games, practices, and tournaments after school and during shorter winter days. Additionally, the mini pitch will allow for more flexible scheduling: multiple teams or age groups can play simultaneously, reducing wait times and increasing inclusivity for younger or newer players. This infrastructure will help absorb overflow demand and encourage greater participation. Installing the mini-pitch will not only improve capacity and hours, but also offer a safe, well-lit, well-maintained space that lowers barriers to participation, especially for youth who currently might not have after-school daylight, or access to full-sized field time.

Page: Project Budget

Budget

Download File (https://nrpa-grants.secure-platform.com/file/27796/eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJtZWRpYUlkIjoyNzc5NiwiYWxsb3dOb3RTaWduZWRVcmwiOiJGYWxzZSIsImlnbm9yJ0EiIE?NRPA%20Musco%20Grant%20Budget%20Template%20.xlsx)

Additional Funding

We will not need additional funding for this project outside of our operational budget.

Page: Technical Assistance

Agency Participants

Primary: Cain Clifton, Sr. Sports Operations Manager, cain.clifton@knoxcounty.org , 865-203-9324 Secondary: Katie Huneycutt, Administrative Coordinator, katie.huneycutt@knoxcounty.org, 865-318-1887

Page: Letter of Support

Letter of Support

No File Uploaded

How Did You Hear About Us?

NRPA Website or blog

Please Specify

Page: Multimedia Attachments (Optional)

For partial media applicants, please upload link(s) to your media here. There are **six** multimedia upload opportunities below to share multimedia attachments (one for each section that allows a multimedia response within the application). Those sections are as follows:

- Project Management
- Project Information
- Commitment to Diversity, Equity and Inclusion
- Project Budget
- Technical Assistance and
- In-Kind Donation

Be sure to indicate which questions will be addressed through each media submission in the application question boxes. Remember to ensure all points of the application questions are addressed in your media submissions.

All six multimedia submissions cannot exceed a total of 20 minutes combined.

Multimedia 1: Link

Multimedia 1: Application Question

Multimedia 2: Link

Multimedia 2: Application Question

Multimedia 3: Link

Multimedia 3: Application Question

Multimedia 4: Link
Multimedia 4: Application Question
Multimedia 5: Link
Multimedia 5: Application Question
Multimedia 6: Link
Multimedia 6: Application Question

Katie Huneycutt

From: Kent Hunt <khunt@nrpa.org>
Sent: Thursday, January 22, 2026 6:19 PM
To: Katie Huneycutt
Cc: Teresa Morrissey
Subject: [External]NRPA Youth Sports Access Grant Award Notification - Knox County
Attachments: 2026 NRPA & Knox CountyTN Youth Sports Access MOU.docx

Greetings Katie,

Congratulations! We are pleased to inform you that your application for the 2026 Youth Sports Access Grant has been accepted. Your commitment to increasing access to youth sports stood out, and we look forward to partnering with you on this important initiative. We're excited to award your agency an in-kind donation valued at $89,580 to install a Musco Lighting mini-pitch, along with $20,000 in grant funds to activate the space in accordance with the project described in your application. Please note that if the total cost of the mini-pitch exceeds the in-kind amount, your agency will be responsible for covering any remaining costs.

Confidentiality
Please maintain confidentiality regarding this award until further notice. This includes refraining from public announcements such as social media posts, email newsletters, press releases, and communications with community members or external partners. NRPA will provide a marketing toolkit and approval to publicly share once all administrative items, including MOUs, are finalized.

Next Steps

1. Confirm Your Acceptance: Please indicate whether you accept this award by February 6, 2026. Email confirmation is sufficient.
2. Review and Finalize the MOU
    a. Please review the attached MOU and submit any proposed edits by February 13, 2026.
    b. Provide the name and email of the individual who will sign.
    c. NRPA will route the final version via DocuSign.
3. In-Kind Donation
    a. NRPA will connect your agency with Musco Lighting, and you will receive a separate letter for the donation.
4. Confirm Organization Name
    a. Please confirm how NRPA should list your organization's name in NRPA communications (for example, a press release).

Save the Date — Kickoff Call
Please save the date for a kickoff call with NRPA and fellow grantees. This call will review grant expectations, reporting requirements, timelines, and opportunities for connection.
Kickoff Call Details:

- Date: Monday, February 23, 2026 at 2:00pm – 3:30 pm EST
- A calendar invite along with a Zoom link will be shared within the next week.

Optional Training Opportunity
NRPA and the U.S. Soccer Foundation are offering a free Coach-Mentor training webinar on Thursday, January 29, at 1:00pm EST. The session focuses on evidence-based strategies for building strong youth connections and supporting positive youth development across youth sports program.

While participation in this training is not required for this grant, it is an excellent opportunity to build practical skills that can help jumpstart your new project.
Register here: NRPA & US Soccer Foundation Coach-Mentor Training Registration

Please let me know if you have any questions.

Thanks!

Kent

NATIONAL RECREATION AND PARK ASSOCIATION

Kent Hunt, CPRP (he/him/his)
Program Manager
National Recreation and Park Association
571.223.2414 | khunt@nrpa.org
www.nrpa.org

DONATE

>>>CAUTION<<<
This message originates outside of the Knox County email system. Use caution if this message contains attachments, links or requests for information.

RLA-18180 **R-26-3-801**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Jill Rosberg, LAW DEPARTMENT
Department:	FINANCE DEPARTMENT
Requires Expenditure of Funds:	NO Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, requesting the unclaimed balance of accounts remitted to the State Treasurer under the Unclaimed Property Act for the report year ending June 30, 2023.
(Finance)

Attachments

Resolution
Unclaimed Property Listing 1
Unclaimed Property Listing 2

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, REQUESTING THE UNCLAIMED BALANCE OF ACCOUNTS REMITTED TO THE STATE TREASURER UNDER THE UNCLAIMED PROPERTY ACT FOR THE REPORT YEAR ENDING JUNE 30, 2023.

RESOLUTION: **R-26-3-801**

REQUESTED BY: **FINANCE**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, the Tennessee Uniform Disposition of Unclaimed Property Act, set forth at Tenn. Code Ann. § 66-29-101, et seq., provides that a municipality or county in Tennessee may request payment for the unclaimed balance of funds reported and remitted by or on behalf of the local government and its agencies if it exceeds one hundred dollars ($100.00), less a proportionate share of the cost of administering the program; and

WHEREAS, Knox County and/or its agencies have remitted unclaimed accounts to the State Treasurer in accordance with the Uniform Disposition of Unclaimed Property Act for the report year ending June 30, 2023; and

WHEREAS, Knox County agrees to meet all of the requirements of the Uniform Disposition of Unclaimed Property Act and to accept liability for future claims against accounts represented in funds paid to it and to submit an annual report of claims received on these accounts to the State Treasurer; and

WHEREAS, it is agreed that Knox County will retain a sufficient amount to ensure prompt payment of allowed claims without deduction for administrative costs or service charges and that the balance of funds will be deposited in Knox County's general fund.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Commission of Knox County, Tennessee hereby requests the State Treasurer to pay the unclaimed balance of funds remitted for the 2023 report year to Knox County in accordance with the provisions of Tennessee Code Annotated Section 66-29-121. A list of remittances made by or on behalf of Knox County and its agencies is attached hereto.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

HRS Pro Unclaimed Property Listing - Summary

Knox County Government State Reported: TN Year: 2024 Description: 07.01.2022-06.30.2023 Conversion Year 2024 Report 1

Created 02/03/2026 02:36:19 PM

Property Status	Property Count	Cash Reported	Additions	Deductions	Cash to Remit	Shares	Tangibles
Reportable	**46**	**$46,758.18**	**$0.00**	**$0.00**	**$46,758.18**	**0**	**0**
Non Reportable	**0**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**0**	**0**
Refunded/Reactivated	**0**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**0**	**0**

Property Type	Primary Owner	Cash to Remit	Shares to Remit	Tangible Boxes
1. MS01	AGGREGATE	$48.42	0.0000	0
2. MS99	AGGREGATE	$9,714.16	0.0000	0
3. MS04	Assoc of State Service Commissions	$250.00	0	0
4. MS04	Amanda Picket Barber	$206.35	0	0
5. MS04	Molly Ann Bate	$101.00	0	0
6. MS04	Chasity Carter	$55.00	0	0
7. MS04	Cody Cheatham	$55.00	0	0
8. MS04	Donna Cline	$100.00	0	0
9. MS04	Jason Cook	$77.00	0	0
10. MS04	Chesney Cooper	$66.00	0	0
11. MS04	Days Inn North	$585.00	0	0
12. MS04	Matthew Germain	$285.58	0	0
13. MS04	Dillon Gouge	$135.00	0	0
14. MS04	Hardin Valley Academy	$500.00	0	0
15. MS04	Joseph Hatton	$99.00	0	0
16. MS04	Allen Scott Holman II	$300.00	0	0
17. MS04	lIndsay Honaker	$99.00	0	0
18. MS04	Allison Keith	$53.71	0	0
19. MS04	Knoxville RehabShop LLC	$1,350.00	0	0
20. MS04	Krug & Sons/Jessica Worthington	$301.00	0	0
21. MS04	Nathan Lee	$53.11	0	0

HRS Pro Unclaimed Property Listing - Summary

Knox County Government State Reported: TN Year: 2024 Description: 07.01.2022-06.30.2023 Conversion Year 2024 Report 1

Created 02/03/2026 02:36:19 PM

22. MS04	Thomas Stuart Liggin	$93.00	0	0
23. MS04	Caleb Neeley	$210.26	0	0
24. MS04	Vicky O'Brien	$200.00	0	0

HRS Pro Unclaimed Property Listing - Summary

Knox County Government State Reported: TN Year: 2024 Description: 07.01.2022-06.30.2023 Conversion Year 2024 Report 1

Created 02/03/2026 02:36:19 PM

Property Type	Primary Owner	Cash to Remit	Shares to Remit	Tangible Boxes
25. MS04	Payson Bread	$164.00	0	0
26. MS04	Cynthia Pearman	$55.00	0	0
27. MS04	Jace Pennington	$143.00	0	0
28. MS04	Robin Rogers	$66.00	0	0
29. MS04	Jeremy Rose	$51.00	0	0
30. MS04	Erin Rudd	$105.62	0	0
31. MS04	Ryan White Medical Part B Program	$143.57	0	0
32. MS04	George Sawabini	$62.00	0	0
33. MS04	Brent Schreiber	$84.00	0	0
34. MS04	Shantell Smith	$276.48	0	0
35. MS04	Bailee Smith	$55.00	0	0
36. MS04	SSM Health Care Group	$1,695.00	0	0
37. MS04	Taylor Stephens	$58.13	0	0
38. MS04	Super 8 Powell	$384.93	0	0
39. MS04	TDOH	$18,221.15	0	0
40. MS04	TDOH	$2,957.67	0	0
41. MS04	TDOH	$6,992.17	0	0
42. MS04	Blair Terrill	$55.00	0	0
43. MS04	Sean Thompson	$55.00	0	0
44. MS04	Cynthia Tyree	$55.00	0	0
45. MS04	University Surgeons Associates PC	$89.87	0	0
46. MS04	Brian Wilson	$51.00	0	0

HRS Pro Unclaimed Property Listing - Summary

Knox County Government State Reported: TN Year: 2024 Description: 07.01.2022-06.30.2023 Conversion Year 2024 Report 2

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Property Status	Property Count	Cash Reported	Additions	Deductions	Cash to Remit	Shares	Tangibles
Reportable	51	$17,702.45	$0.00	$0.00	$17,702.45	0	0
Non Reportable	0	$0.00	$0.00	$0.00	$0.00	0	0
Refunded/Reactivated	0	$0.00	$0.00	$0.00	$0.00	0	0

Property Type	Primary Owner	Cash to Remit	Shares to Remit	Tangible Boxes
1. MS01	DWIGHT L AARONS	$150.00	0	0
2. MS01	DWIGHT L AARONS	$170.00	0	0
3. MS04	David Amburn	$324.50	0	0
4. MS01	TAKELA S ANDREWS	$150.00	0	0
5. MS04	Aramark Uniform Services	$313.96	0	0
6. MS04	Jordan Ashcraft	$119.02	0	0
7. MS04	Besty Barkow	$235.42	0	0
8. MS04	Amber Barrett	$75.00	0	0
9. MS04	Cindy Bentley	$315.00	0	0
10. MS01	DEVON BOLLINGER	$230.87	0	0
11. MS04	Dereginald Braxton	$800.00	0	0
12. MS04	Philip Carr	$706.76	0	0
13. MS01	SOLOMON C COCHRAN	$75.00	0	0
14. MS01	SHAQUILLE DAVIS	$594.37	0	0
15. MS01	TRAVIS DONNELL	$180.00	0	0
16. MS04	Ken Easterly	$150.00	0	0
17. MS04	David B Eilart	$200.00	0	0
18. MS04	Adam M Elrod	$60.00	0	0
19. MS04	Christine Furman	$98.10	0	0
20. MS04	Chris Goodman	$73.95	0	0
21. MS04	Jessica Hoffman	$298.09	0	0

HRS Pro Unclaimed Property Listing - Summary

Knox County Government State Reported: TN Year: 2024 Description: 07.01.2022-06.30.2023 Conversion Year 2024 Report 2

Created 02/03/2026 02:36:31 PM

22. MS04	Jessica Hoffman	$427.41	0	0
23. MS04	Jessica Hoffman	$326.42	0	0
24. MS04	Jessica Hoffman	$312.03	0	0

HRS Pro Unclaimed Property Listing - Summary

Knox County Government State Reported: TN Year: 2024 Description: 07.01.2022-06.30.2023 Conversion Year 2024 Report 2

Created 02/03/2026 02:36:31 PM

Property Type	Primary Owner	Cash to Remit	Shares to Remit	Tangible Boxes
25. MS04	Jessica Hoffman	$246.47	0	0
26. MS04	Jessica Hoffman	$297.63	0	0
27. MS04	Hovis Orthopaedic Clinic	$1,250.00	0	0
28. MS04	Nathaniel M Howard	$123.00	0	0
29. MS04	Lisa Hudgens	$248.79	0	0
30. MS01	REBECCA KLOSKO	$754.11	0	0
31. MS04	Kroger	$247.50	0	0
32. MS04	Reese Law	$50.00	0	0
33. MS01	AUSTIN R LEE	$217.50	0	0
34. MS01	KINZA L LEWIS WHITE	$265.00	0	0
35. MS01	GLENN K MARTIN	$64.64	0	0
36. MS04	McKinley Mooneyham	$279.00	0	0
37. MS01	KAYLA G MOORE	$50.00	0	0
38. MS01	TERRY A MORGAN	$267.81	0	0
39. MS01	TERRY A MORGAN	$267.81	0	0
40. MS01	TERRY A MORGAN	$267.81	0	0
41. MS01	JAMIR MUNOZ	$392.98	0	0
42. MS04	Lumary Perez Castillo	$129.96	0	0
43. MS01	ALTIN PERRY	$61.42	0	0
44. MS04	ReasySetCoTeach	$500.00	0	0
45. MS01	TRAVIS J RUSSELL	$913.43	0	0
46. MS04	Christopher Sailer	$2,757.35	0	0
47. MS04	Christopher Sailer	$1,016.67	0	0
48. MS04	Bobbie Swanger	$50.00	0	0
49. MS04	Caroline Williford	$162.25	0	0
50. MS04	Hayley Young	$235.42	0	0

HRS Pro Unclaimed Property Listing - Summary

Knox County Government State Reported: TN Year: 2024 Description: 07.01.2022-06.30.2023 Conversion Year 2024 Report 2

Created 02/03/2026 02:36:31 PM

Property Type	Primary Owner	Cash to Remit	Shares to Remit	Tangible Boxes
51. MS04	Young Men of Purpose Mentoring LLC	$200.00	0	0

RLA-18174 **R-26-3-901**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Jill Rosberg, LAW DEPARTMENT
Department:	FINANCE DEPARTMENT
Requires Expenditure of Funds:	YES Funded in Current Budget: YES
Appropriation Required:	NO

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving an Extension of Contract No. 21-799 with Pugh & Company, PC for professional auditing services for the Fiscal Year 2026 independent audit of the accounts of Knox County in the amount of $380,500.00.
(Audit Committee)

Attachments

Resolution
Contract Extension

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING AN EXTENSION OF CONTRACT NO. 21-799 WITH PUGH & COMPANY, PC FOR PROFESSIONAL AUDITING SERVICES FOR THE FISCAL YEAR 2026 INDEPENDENT AUDIT OF THE ACCOUNTS OF KNOX COUNTY IN THE AMOUNT OF $380,500.00.

RESOLUTION: **R-26-3-901**

REQUESTED BY: **AUDIT COMMITTEE**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, the Knox County Commission (the "Commission") is required by the Knox County Charter to provide annually, by resolution, for an independent audit of the accounts of Knox County (the "County"); and

WHEREAS, by means of Resolution R-22-1-901, the Commission approved a contract with Pugh & Company PC, designated as Contract No. 21-799, for professional auditing services for Knox County's annual independent audits (the "Contract"); and

WHEREAS, the Contract provides for extensions on a yearly basis at the recommendation of the Knox County Audit Committee (the "Audit Committee") and with the approval of the Commission; and

WHEREAS, at its meeting on February 25, 2026, the Audit Committee approved an extension to the Contract for Pugh & Company PC to provide the professional auditing services for the Fiscal Year 2026 independent audit; and

WHEREAS, the proposed Extension of Contract is in the amount of $380,500.00 for the Fiscal Year 2026 independent audit and is effective beginning on April 1, 2026 and ending on March 31, 2027 and may continue to be extended on a yearly basis at the recommendation of the Audit Committee and with the approval of the Commission.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Extension of Contract No. 21-799 with Pugh & Company PC for professional auditing services for the Fiscal Year 2026 independent audit of the accounts of Knox County is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Extension of Contract No. 21-799 with Pugh & Company PC for professional auditing services for the Fiscal Year 2026 independent audit of the accounts of Knox County shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Extension of Contract No. 21-799

Knox County Government

and

Pugh & Company PC

This Extension of Contract, made and entered into between the Knox County Government, hereinafter referred to as the "County" and Pugh & Company PC, hereinafter referred to as "Contractor".

Whereas, County and Contractor entered into Contract No. 21-799 for Professional Auditing Services for Knox County Government (Request for Qualifications #3097) and;

Whereas, County and Contractor desire to extend said Contract for one year pursuant to the terms of said Contract.

Now, therefore in consideration of mutual covenants and promises contained herein, the parties hereto wish to extend Contract No. 21-799 and do mutually agree that;

Witnesseth:

1. Scope of work. Contractor shall perform in a timely, good and workmanlike manner all work set forth in and in accordance with the Contractor's Addendum. Attached hereto and made part of this Extension of Contract as if set out in full are (1) Contractor's Addendum, as Exhibit 1 and (2) State of Tennessee "Contract to Audit Accounts" contract, as Exhibit 2.

2. Terms of this Contract. This Extension of Contract commences on the 1st day of April 2026 and ends the 31st day of March 2027 unless terminated in conformity with the terms of this Contract as contained in paragraphs 6 and 7. The Contract may be extended on a yearly basis at the recommendation of the Knox County Audit Committee and with the approval of the Knox County Commission. The County reserves the right to purchase these goods/services from other sources if the need arises. The County reserves the right to revoke the award if a pattern of unavailability arises with the Contractor.

3. Except as hereby modified, all terms and conditions of Contract No. 21-799 shall remain in full force and effect.

In witness whereof, the parties hereto have caused this Extension of Contract No. 21-799 to be executed in one original as of the day and year last written below.

KNOX COUNTY GOVERNMENT

_____
GLENN JACOBS
Knox County Mayor

Date: _____

KNOX COUNTY LAW DIRECTOR'S OFFICE

CONTRACT NO. 26-064
APPROVED AS TO LEGAL FORM

_____
CHARLES F. STERCHI, III
Chief Deputy Law Director

Date: 1-28-26

CONTRACTOR

_____
AUTHORIZED SIGNATURE

_____
Printed Name

PUGH & COMPANY PC
COMPANY NAME

Date: _____

ADDENDUM TO CONTRACT TO AUDIT ACCOUNTS OF KNOX COUNTY (Page 1 of 12)

RELATED TO KNOX COUNTY GOVERNMENT

FOR THE PERIOD FROM JULY 1, 2025 TO JUNE 30, 2026

The Objective and Scope of the Audit of the Financial Statements

You have requested ("Pugh", the "Firm", "we", "us", or "our") audit the governmental activities, business-type activities, discretely presented component units, each major fund, budgetary comparison statement of the general fund and aggregate remaining fund information of Knox County, Tennessee (the "County"), as of and for the year ended June 30, 2026 and the related notes to the financial statements, which collectively comprise the County's basic financial statements. Also, you acknowledge that we are the group auditor for the Knox Education Foundation (KEF), a discretely presented component unit reported in the financial statements of the County. We will not audit the financial statements of KEF, which will be audited by the component auditor. Our opinion, insofar as it relates to the amounts included for KEF, will be based solely on the report of the other auditor. In addition, you have requested that we audit the financial statements of the Knoxville-Knox County Emergency Communications District, Geographic Information System and the Knoxville-Knox County Planning Commission as of and for the year ended June 30, 2026.

We are pleased to confirm our acceptance and our understanding of this audit engagement by means of this Contract and Addendum.

Our audits will be conducted with the objective of expressing our opinions on the financial statements.

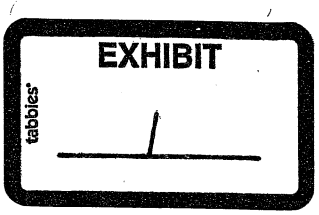
We will also perform your audit so as to satisfy the audit requirements imposed by the Single Audit Act and Subpart F of Title 2 U.S. Code of Federal Regulations ("CFR") Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* ("*Uniform Guidance*").

The Responsibilities of the Auditor

We will conduct our audit in accordance with auditing standards generally accepted in the United States of America (GAAS); "Government Auditing Standards" issued by the Comptroller General of the United States (GAS); the provisions of the Single Audit Act; Subpart F of Title 2 U.S. CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*; and the U.S. Office of Management and Budget's ("OMB") Compliance Supplement and guidance provided in the applicable State of Tennessee Audit Guides. Those standards, regulations, supplements or guides require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

Because of the inherent limitations of an audit, together with the inherent limitations of internal control, an unavoidable risk that some material misstatements may not be detected exists, even though the audit is properly planned and performed in accordance with GAAS. Also, an audit is not designed to detect errors or frauds that are immaterial to the financial statements. The determination of waste or abuse is subjective; therefore, *Government Auditing Standards* do not expect us to provide reasonable assurance of detecting waste or abuse.

In making our risk assessments, we consider internal control relevant to the County's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances but not for the purpose of expressing an opinion on the effectiveness of the County's internal control. However, we will communicate to you in writing concerning any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audits.



We will also communicate to the Audit Committee (a) any fraud involving senior management and fraud whether caused by senior management or other employees that causes a material misstatement of the financial statements that becomes known to us during the audit, and (b) any instances of noncompliance with laws and regulations that we become aware of during the audit unless they are clearly inconsequential.

We are responsible for the compliance audit of major programs under the *Uniform Guidance*, including the determination of major programs, the consideration of internal control over compliance, and reporting responsibilities.

Our report(s) on internal control will include any significant deficiencies and material weaknesses in controls of which we become aware as a result of obtaining an understanding of internal control and performing tests of internal control consistent with requirements of the standards and regulations identified above. Our report(s) on compliance will address material errors, fraud, waste or abuse, violations of compliance obligations, and other responsibilities imposed by state and federal statutes and regulations and assumed by contracts; and any state or federal grant, entitlement or loan program questioned costs of which we become aware, consistent with requirements of the standards and regulations identified above.

The funds that you have informed us of are maintained by the County and that are to be included as part of our audits are listed on pages 9 through 11 of this Addendum, including ours and your responsibilities related to the preparation of the reports.

The component units and jointly governed organizations whose financial statements you have told us are to be included as part of the County's basic financial statements are listed on pages 10 and 11 of this Addendum.

The Responsibilities of Management and Identification of the Applicable Financial Reporting Framework

Our audits will be conducted on the basis that management and when appropriate, those charged with governance, acknowledge and understand that they have responsibility

1. For the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America.
2. To evaluate subsequent events through the date the financial statements are issued or available to be issued, and to disclose the date through which subsequent events were evaluated in the financial statements. Management also agrees that it will not evaluate subsequent events earlier than the date of the management representation letter referred to below;
3. For the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error; and
4. For establishing and maintaining effective internal control over financial reporting and for informing us of all significant deficiencies and material weaknesses in the design or operation of such controls of which it has knowledge;
5. For identifying and ensuring that the County complies with the laws and regulations applicable to its activities, and for informing us about all known material violations of such laws or regulations. In addition, management is responsible for the design and implementation of programs and controls to prevent and detect fraud or waste or abuse and for informing us about all known or suspected fraud or waste or abuse affecting the entity involving management, employees who have significant roles in internal control, and others where the fraud or waste or abuse could have a material effect on the financial statements or compliance. Management is also responsible for informing us of its knowledge of any allegations of fraud or waste or abuse or suspected fraud or waste or abuse affecting the County received in communications from employees, former employees, analysts, regulators, State of Tennessee Comptroller of the Treasury, grantors of federal and state awards, or others.

6. For *(a)* making us aware of significant vendor relationships where the vendor is responsible for program compliance, *(b)* following up and taking corrective action on audit findings, including the preparation of a summary schedule of prior audit findings, and a corrective action plan, and *(c)* report distribution including submitting the reporting package(s).
7. To provide us with:
    a. Access to all information of which management is aware is relevant to the preparation and fair presentation of the financial statements such as records, documentation, and other matters;
    b. Additional information that we may request from management for the purpose of the audit; and
    c. Unrestricted access to persons within the County from whom we determine it necessary to obtain audit evidence.
    d. When applicable, a summary schedule of prior audit findings for inclusion in the single audit reporting package, and
    e. If applicable, responses to any findings reported on the schedule of findings and questioned costs.

As part of our audit process, we will request from management and when appropriate, those charged with governance, written confirmation concerning representations made to us in connection with the audits including among other items:

1. That management has fulfilled its responsibilities as set out in the terms of this Contract and Addendum; and
2. That it believes the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

Management is responsible for the preparation of the required supplementary information (RSI) and the supplementary information (SI) in accordance with accounting principles generally accepted in the United States of America. Management agrees to include the auditor's report on the RSI and SI in any document that contains the required supplementary information and supplementary information and that indicates that the auditor has reported on RSI and SI. Management also agrees to present the RSI and SI with the audited financial statements or, if the RSI and SI will not be presented with audited financial statements, to make the audited financial statements readily available to the intended users of the RSI and SI no later than the date of issuance of the RSI, SI and the auditor's report thereon.

Because the audit will be performed in accordance with the Single Audit Act and the *Uniform Guidance*, management is responsible for (a) identifying all federal awards received; (b) preparing the schedule of expenditures of federal awards (including notes and noncash assistance received) in accordance with *Uniform Guidance* requirements; (c) internal control over compliance; (d) compliance with federal statutes, regulations, and the terms and conditions of federal awards; (e) making us aware of significant vendor relationships where the vendor is responsible for program compliance; (f) following up and taking corrective action on audit findings, including the preparation of a summary schedule of prior audit findings and a corrective action plan; and (g) submitting the reporting package and data collection form.

Those charged with governance are responsible for informing us of their views about the risks of fraud, waste or abuse within the County, and their knowledge of any fraud, waste or abuse or suspected fraud, waste or abuse affecting the County.

Our association with an official statement or memorandum is a matter for which separate arrangements will be necessary. The County agrees to provide us with printer's proofs or masters of such offering documents for our review and approval before printing and with a copy of the final reproduced material for our approval before it is distributed. In the event our auditor/client relationship has been terminated when the County seeks such consent, we will be under no obligation to grant such consent or approval.

The County agrees that it will not associate us with any public or private securities offering, including tax exempt debt without first obtaining our consent. Therefore, the County agrees to contact us before it includes our reports or otherwise makes reference to us, in any public or private securities offering, including tax exempt debt. We may conclude that we are not otherwise associated with the proposed offering and that our association with the proposed offering is not necessary, providing the County agrees to clearly indicate that we are not associated with the contents of the official statement or memorandum. The County agrees that the following disclosure will be prominently displayed in the official statement or memorandum:

> *Pugh & Company, P.C., our independent auditor, has not been engaged to perform, and has not performed, since the date of its report included herein, any procedures on the financial statements addressed in that report. Pugh & Company, P.C., also has not performed any procedures relating to this official statement or memorandum.*

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in these sites or to consider the consistency of other information in the electronic site with the original document.

Because Pugh & Company, P.C. will rely on Knox County, Tennessee and its management and audit committee to discharge the foregoing responsibilities, Knox County, Tennessee holds harmless and releases Pugh & Company, P.C. its partners, and employees from all claims, liabilities, losses, and costs arising in circumstances where there has been a knowing misrepresentation by a member of Knox County, Tennessee's management which has caused, in any respect, Pugh & Company, P.C.'s breach of contract or negligence, as allowed under Tennessee Law, if , and only if Pugh & Company, P.C. has met its professional responsibilities and obligations under GAAS and Government Auditing Standards. This provision shall survive the termination of this arrangement for services.

Knox County's Records and Assistance

If circumstances arise relating to the condition of the County's records, the availability of appropriate audit evidence, or indications of a significant risk of material misstatement of the financial statements because of error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment, prevent us from completing the audit or forming an opinion, we retain the unilateral right to take any course of action permitted by professional standards, including declining to express an opinion, issue a report, or withdraw from the engagement.

During the course of our engagement, we may accumulate records containing data that should be reflected in the County's books and records. The County will determine that all such data, if necessary, will be so reflected. Accordingly, the County will not expect us to maintain copies of such records in our possession.

Non-audit Services

In connection with our audit, you have requested us to perform the following non-audit services:

1. Review and assistance, as needed, with annual comprehensive financial report and assessment of new accounting standards.

GAS independence standards require that the auditor maintain independence so that opinions, findings, conclusions, judgments and recommendations will be impartial and viewed as impartial by reasonable and informed third parties. Before we agree to provide a non-audit service to the County, we determine whether providing such a service would create a significant threat to our independence for GAS audit purposes, either by itself or in aggregate with other non-audit services provided. A critical component of our determination is consideration of management's ability to effectively oversee the non-audit services to be performed. The County has agreed that Mr. Chris Caldwell, Director of Finance possesses suitable skill, knowledge or experience and that the individual understands the services to be performed sufficiently to oversee them. Accordingly, the management of the County agrees to the following:

1. The County has designated Mr. Chris Caldwell, Director of Finance, as a senior member of management who possesses suitable skill, knowledge and experience to oversee the services;
2. Mr. Chris Caldwell, Director of Finance, will assume all management responsibilities for subject matter and scope of the non-audit services;
3. The County will evaluate the adequacy and results of the services performed; and
4. The County accepts responsibility for the results and ultimate use of the services.

GAS further requires that we establish an understanding with the County's management and those charged with governance of the objectives of the non-audit services, the services to be performed, the entity's acceptance of its responsibilities, the auditor's responsibilities and any limitations of the non-audit services. We believe this addendum and contract documents that understanding.

You have informed us that you intend to prepare an annual comprehensive financial report and submit it for evaluation by the Government Finance Officers Association's Certificate of Achievement for Excellence in Financial Reporting. Our association with the annual comprehensive financial report in this regard is to consist of consulting with various Finance Department personnel to determine what current year changes are needed in order to assist the County to continue to be eligible to receive this annual award.

Fees, Costs, and Access to Workpapers

Our fees for the audits described above, as shown on the attached schedule and our proposal as amended, are based upon the value of the services performed and the time required by the individuals assigned to the engagement, plus direct expenses. Our fee estimate and completion of our work is based upon the following criteria:

1. Anticipated cooperation from County personnel.
2. Timely responses to our inquiries.
3. Timely completion and delivery of client assistance requests.
4. Timely communication of all significant accounting and financial reporting matters.
5. The assumption that unexpected circumstances will not be encountered during the engagement.

If any of the aforementioned criteria are not met, then fees may increase. Interim billings will be submitted as work progresses and as expenses are incurred. Our estimated fees are shown in this addendum. Billings are due upon submission.

Our fee estimate will be subject to adjustments based on unanticipated changes in the scope of our work and/or the incomplete or untimely receipt by us of the information on the client participation list. All other provisions of this addendum will survive any fee adjustment. Conferences, consultations, accounting services or additional audit procedures will be billed in addition, at our standard hourly rates.

Our professional standards require that we perform certain additional procedures on current and previous years' engagements whenever a partner or professional employee leaves the firm and is subsequently employed by or associated with a client. Accordingly, the County agrees it will compensate Pugh & Company, P.C. for any additional costs incurred as a result of the County's employment of a partner or manager of Pugh & Company, P.C.

In the event we are requested or authorized by the County or are required by government regulation, subpoena, or other legal process to produce our documents or our personnel as witnesses with respect to our engagements for the County, the County will, so long as we are not a party to the proceeding in which the information is sought, reimburse us for our professional time and expenses incurred in responding to such requests.

The documentation for this engagement is the property of Pugh & Company, PC. However, you acknowledge and grant your assent that representatives of the cognizant or oversight agency or their designee, other government audit staff, and the U.S. Government Accountability Office shall have access to the Audit Documentation upon their request and that we shall maintain the Audit Documentation for a period of at least three years after the date of the report, or for a longer period if we are requested to do so by the cognizant or oversight agency. Access to requested documentation will be provided under the supervision of Pugh & Company, PC audit personnel and at a location designated by our Firm. The audit documentation for this engagement will also be retained for a limited period of time in accordance with our firm's file retention policies and the requirements of the attached contract. However, it will be your responsibility to retain copies of all of your entity's internal documents and accounting records to support inquiries of third parties or taxing authorities, including financial reports and tax returns.

Claim Resolution

The County and Pugh & Company, P.C. agree that no claim arising out of services rendered pursuant to this agreement shall be filed after the appropriate State of Tennessee statute of limitations has expired.

Reporting

We will issue written reports upon completion of our audits of Knox County's and the component units and jointly governed organizations' financial statements. Our report will be addressed to the mayor, county commissioners and audit committee of Knox County, Tennessee. We cannot provide assurance that an unmodified opinion will be expressed. Circumstances may arise in which it is necessary for us to modify our opinion, add an emphasis-of-matter or other-matter paragraph(s), or withdraw from the engagement.

In addition to our report(s) on the County's financial statements, we will also issue the following reports or types of reports:

1. A report on the fairness of the presentation of the County's schedule of expenditures of federal and state awards for the year ending June 30, 2026.
2. Report(s) on internal control related to the financial statements and major federal programs. These reports will describe the scope of testing of internal control and the results of our tests of internal controls.
3. Report(s) on compliance with laws, regulations, and the provision of contracts or grant agreements. We will report on any noncompliance which could have a material effect on the financial statements and any noncompliance which could have a material effect, as defined by Subpart F of Title 2 U.S. CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, on each major program;
4. A schedule of findings and questioned costs, if applicable.
5. A disposition of prior year findings and questioned costs, if applicable.

Electronic Signatures and Counterparts

Each party hereto agrees that any electronic signature of a party to this agreement or any electronic signature to a document contemplated hereby (including any representation letter) is intended to authenticate such writing and shall be as valid, and have the same force and effect, as a manual signature. Any such electronically signed document shall be deemed (a) to be "written" or "in writing," (b) to have been signed and (c) to constitute a record established and maintained in the ordinary course of business and an original written record when printed from electronic files. Each party hereto also agrees that electronic delivery of a signature to any such document (via email or otherwise) shall be as effective as manual delivery of a manual signature. For purposes hereof, "electronic signature" includes, but is not limited to, (a) a scanned copy (as a "pdf" (portable document format) or other replicating image) of a manual ink signature, (b) an electronic copy of a traditional signature affixed to a document, (c) a signature incorporated into a document utilizing touchscreen capabilities or (d) a digital signature. This agreement may be executed in one or more counterparts, each of which shall be considered an original instrument, but all of which shall be considered one and the same agreement. Paper copies or "printouts," of such documents if introduced as evidence in any judicial, arbitral, mediation or administrative proceeding, will be admissible as between the parties to the same extent and under the same conditions as other original business records created and maintained in documentary form. Neither party shall contest the admissibility of true and accurate copies of electronically signed documents on the basis of the best evidence rule or as not satisfying the business records exception to the hearsay rule.

Other Relevant Information

From time to time and depending upon the circumstances, we may use third-party service providers to assist us in providing professional services to you. In such circumstances, it may be necessary for us to disclose confidential client information to them. We enter into confidentiality agreements with all third-party service providers and we are satisfied that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others.

In accordance with *Government Auditing Standards*, a copy of our most recent peer review report is available on our website at www.pughcpas.com under Services/Audit & Assurance/Latest Peer Review Report, for your information.

At your option, you may provide Internet access to Pugh & Company, P.C. personnel. You should ensure that appropriate safeguards, including virus protection software with current deflections and firewalls, are implemented to protect your information systems.

This addendum and related attached State of Tennessee "Contract to Audit Accounts" and the contract between Knox County, Tennessee and Pugh & Company, P.C. dated January 26, 2026, as renewed, constitute the complete and exclusive statement of agreement between Pugh & Company, P.C. and the County, superseding all proposals, oral or written, and all other communications with respect to the terms of the engagement between the parties.

ADDENDUM TO CONTRACT TO AUDIT ACCOUNTS OF KNOX COUNTY (Page 8 of 12)

RELATED TO KNOX COUNTY GOVERNMENT

FOR THE PERIOD FROM JULY 1, 2025 TO JUNE 30, 2026

Our fees for services we will perform for the year ended June 30, 2026 are estimated as $380,500 including the following:

PROFESSIONAL AUDITING SERVICES

AUDIT FEES

Pricing Components	Fiscal Year 2026
Knox County, including Constitutional Offices; Board of Education; KCRA	$ 314,200
School Cafeteria Fund	included above
Emergency Communications District	31,700
Geographic Information System	10,800
Knoxville – Knox County Planning Commission	23,800
Total	$ 380,500
Major Programs - Fee Impact:	
Knox County Audit:	
Number of major federal award programs	6
Amount per major federal award program	$3,000 if more no change if less
Knoxville – Knox County Planning Commission Audit:	
Number of major federal award programs	1
Amount per major federal award program	$3,000 if more no change if less

The above estimates are based on the level of experience of the individuals who will perform the services. In addition, out-of-pocket expenses will be billed for reimbursement as incurred. Circumstances encountered during the performance of these services that warrant additional time or expense will cause us to be unable to deliver them within the above estimates. We will endeavor to notify you of any such circumstances as they are assessed and arrive at a new fee estimate. Any additional services necessary for completion of the audits requested by the County, or as listed in attached contract, will be performed and billed at the rates shown below, as adjusted annually.

Our current hourly billing rates in effect at the time of our proposal for the personnel currently planned to be assigned to this engagement were as follows, subject to annual adjustment:

Officers	$315
Senior Manager	$235
Manager	$190
Senior	$150
Staff	$130
IT Auditor	$230

RELATED TO KNOX COUNTY GOVERNMENT

FOR THE PERIOD FROM JULY 1, 2025 TO JUNE 30, 2026

Scope of Audit Services

Audit of Financial Statements of:

I. Knox County
   - A. General Fund
   - B. Major Governmental Funds
     1. Capital Projects - Public Improvement Fund
     2. Debt Service Fund
     3. State, Federal and Other Grants Fund
   - C. Non-Major Special Revenue Funds
     1. Constitutional Officers Fund
     2. Governmental Library Fund
     3. Public Library Fund
     4. Solid Waste Fund
     5. Hotel/Motel Tax Fund
     6. Drug Control Fund
     7. Engineering & Public Works Fund
   - D. Non-Major Enterprise Fund
     1. Three Ridges Golf Course Fund
   - E. Internal Service Funds
     1. Vehicle Service Center Fund
     2. Mailroom Fund
     3. Employee Benefits Fund
     4. Self-Insurance Fund
     5. Building Operations Fund
     6. Technical Support Service Fund
     7. Self-Insurance Healthcare Fund
     8. Capital Leasing Fund

Scope of Audit Services (Continued)

F. Pension Trust Funds
   1. Pension Trust Fund - Closed Defined Benefit Plan (Defined Benefit)
   2. Pension Trust Fund - Uniform Officers Pension Plan (Defined Benefit)
   3. Pension Trust Fund - Asset Accumulation Plan (Defined Contribution)
   4. Pension Trust Fund - Voluntary 457 Plan (Defined Contribution)
   5. Pension Trust Fund - Medical Expense Retirement Plan (Defined Contribution)
   6. Pension Trust Fund - Sheriff's Total Accumulation Retirement Plan (Defined Contribution)
   7. Pension Trust Fund - Employee Disability Plan (OPEB)
   8. Pension Trust Fund - Retiree Healthcare Plan (OPEB)

G. Custodial Funds
   1. Municipal Sales Tax Fund
   2. Subdivision Bonds
   3. External Agencies Fund
   4. Constitutional Officers
      a. Trustee
      b. County Clerk
      c. Circuit and General Sessions Court Clerk
      d. Criminal and Fourth Circuit Court Clerk
      e. Clerk and Master
      f. Register of Deeds

II. Discretely Presented Component Units

A. Knox County Board of Education
   1. Major Funds
      a. General Fund
         1. General Purpose School Fund
      b. Capital Projects Fund
         1. School Construction Fund
      c. Special Revenue Fund
         1. School Federal Projects Fund
   2. Non-Major Governmental Funds
      a. Special Revenue Funds
         1. Central Cafeteria Fund
         2. School General Projects Fund
         3. Internal School Fund
   3. Pension Trust Fund – Teacher's Plan (Defined Benefit)

Scope of Audit Services (Continued)

B. Knox County Railroad Authority (KCRA)

C. Knoxville – Knox County Emergency Communication District (E911) – including two (2) defined contribution pension trust funds in the separately issued audited financial statements of the District.

III. Other entities – in addition to the audit of the County and its component units above, Financial and Compliance audits for the following other Entities' separately issued financial statements, which are not included in the County's ACFR, are also included in this engagement:

A. Knoxville – Knox County Planning Commission

B. Geographic Information System

In addition, it is our understanding that two of the County's discretely presented component units, The Development Corporation of Knox County and the Knox Education Foundation, are audited by other auditors. Accordingly, although these entities will be included in the County's ACFR, we will not audit these component units and our opinions insofar as they relate to the amounts included in your financial statements for these component units will be based on the reports of the other auditors.

ADDENDUM TO CONTRACT TO AUDIT ACCOUNTS OF KNOX COUNTY (Page 12 of 12)

RELATED TO KNOX COUNTY GOVERNMENT

FOR THE PERIOD FROM JULY 1, 2025 TO JUNE 30, 2026

Distribution of Responsibilities

REPORT PREPARATION - The distribution of responsibilities in the preparation of the financial statements will be as follows:

Report Issued	Assistance Provided by the Knox County Department of Finance	Items to be Provided by Pugh & Company, P.C.
Knox County Annual Comprehensive Financial Report (ACFR) and Single Audit Report	The Finance Department will prepare the ACFR and be responsible for the costs of printing, binding, and distributing the report. The Finance Department will prepare the Schedules of Expenditures of Federal (and State) Awards for inclusion in the Single Audit report, and will be responsible for the costs of printing, binding, and distributing the report.	Assist in the preparation of the Data Collection Form required for the Single Audit Report, as needed.
Financial Statements-Pension Plans	The Retirement Office will prepare the financial statements and be responsible for the costs of printing, binding, and distributing the report.	N/A
Financial Statements - Knoxville Knox County Emergency Communications District	The Finance Department will prepare the financial statements and be responsible for the costs of printing, binding, and distributing the report.	N/A
Financial Statements - Geographic Information Systems (GIS)	The Finance Department will prepare the financial statements and be responsible for the costs of printing, binding, and distributing the report.	N/A
Financial Statements and Single Audit Report-Knoxville - Knox County Planning Commission	The Finance Department will prepare the financial statements and prepare the Schedules of Expenditures of Federal (and State) Awards for inclusion in the Single Audit report, and will be responsible for the costs of printing, binding, and distributing the report.	Assist in the preparation of the Data Collection Form required for the Single Audit Report, as needed.

This distribution of responsibilities is based on operations under current accounting standards and entities for which auditing services are requested.

The auditor will be required to file all audit reports with State of Tennessee as required by the Tennessee Comptroller of the Treasury, Division of Local Government Audit.

EXHIBIT
tabbies
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CONTRACT TO AUDIT ACCOUNTS
OF
Knox County

FROM July 01, 2025 TO June 30, 2026

This agreement made this **26th** day of **January 2026**, by and between **Pugh and Company, PC**, **315 North Cedar Bluff Road, Suite 200, Knoxville, TN 37923**, hereinafter referred to as the "auditor" and **Knox County**, of **400 Main Street, Suite 615, Knoxville, TN 37902**, hereinafter referred to as the "organization", as follows:

1. In accordance with the requirements of the laws and/or regulations of the State of Tennessee, the auditor shall perform a financial and compliance audit of the organization for the period beginning **July 01, 2025**, and ending **June 30, 2026** with the **exceptions listed below**:
The scope and terms of the audit work is further detailed in the attached Addendum and excludes the following: Knox Education Foundation, a component unit of Knox County audited by others; Knox County Schools - Internal School Funds (contracted separately); and the separate audit of eight (8) pension and OPEB plans as of and for the year ended June 30, 2026, contracted separately with Knox County Retirement and Pension Board and System.

2. The auditor shall conduct the audit in accordance with *Government Auditing Standards* issued by the Comptroller General of the United States and requirements prescribed by the Comptroller of the Treasury, State of Tennessee, as detailed in the *Audit Manual*. Additional information and procedures necessary to comply with requirements of governments other than the State of Tennessee are permissible provided they do not conflict with or undermine the requirements previously referenced. If applicable, the audit is to be conducted in accordance with the provisions of the Single Audit Act and Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)*. The audit is also to be conducted in accordance with any other applicable federal agency requirements. It is agreed that this audit will conform to standards, procedures, and reporting requirements established by the Comptroller of the Treasury. It is further agreed that any deviation from these standards and procedures will be approved in writing by the Comptroller of the Treasury prior to the execution of the contract. The interpretation of this contract shall be governed by the above-mentioned publications and the laws of the State of Tennessee.

3. The auditor shall, as part of the written audit report, submit to the organization's management and those charged with governance:

a) a report containing an expression of an unmodified or modified opinion on the financial statements, as prescribed by the *Audit Manual*. This report shall state the audit was performed in accordance with *Government Auditing Standards*, except when a disclaimer of opinion is issued. If the organization is a component unit or fund of another entity, it is agreed that: (a) the financial statements may be included in the financial statements of the other entity; (b) the principal auditor for the other entity may rely upon the contracted auditor's report; and (c) any additional information required by the principal auditor of the other entity will be provided in a timely manner.

b) a report on the internal control and on compliance with applicable laws and regulations and other matters. This report shall be issued regardless of whether the organization received any federal funding. Audit reports of entities which are subject to the provisions of the Single Audit Act and OMB's Uniform Guidance shall include the additional reports required by that guidance. The reports will set forth findings, recommendations for improvement, concurrence or nonconcurrence of appropriate officials with the audit findings, comments on management's responses as appropriate, and comments on the disposition of prior year findings.

4. If a management letter or any other reports or correspondence relating to other matters involving internal controls or noncompliance are issued in connection with this audit, a copy shall be filed with the Comptroller of the Treasury by the auditor. Such management letters, reports, or correspondence shall be consistent with the findings published in the audit report (i.e., they shall disclose no reportable matters or significant deficiencies not also disclosed in the findings found in the published audit report). The report should also include a corrective action plan for findings developed under OMB's Uniform Guidance and for other findings in accordance with Tennessee Code Annotated § 9-3-407, and the *Audit Manual*. The corrective action plan is only applicable to findings published in the audit report.

5. The auditor shall file **one (1)** electronic copy of said report with the Comptroller of the Treasury, State of Tennessee. The auditor shall furnish **1** printed copies and/or an electronic copy of the report to the organization's management and those charged with governance. It is anticipated that the auditor's report shall be filed no later than **December 31, 2026**, **or six (6) months following the period to be audited, whichever is earlier, without explanation to the Comptroller of the Treasury, State of Tennessee, and the organization. (Audit documentation for additional procedures for centralized cafeteria systems contracted with audits of internal school funds must be completed and available for review by September 30 following the fiscal year being audited.)** Requirements for additional copies, including those to be filed with the appropriate officials of granting agencies, are listed below:
None

6. The auditor agrees to retain working papers for no less than five (5) years from the date the report is received by the Comptroller of the Treasury, State of Tennessee. In addition, the auditor agrees that all audit working papers shall, upon request, be made available in the manner requested by the Comptroller for review by the Comptroller of the Treasury or the Comptroller's representatives, agents, and legal counsel, while the audit is in progress and/or subsequent to the completion of the report. Furthermore, at the Comptroller's discretion, it is agreed that the working papers will be reviewed at the office of the auditor, the entity, or the Comptroller and that copies of the working papers can be made by the Comptroller's representatives or may be requested to be made by the firm and may be retained by the Comptroller's representatives.

7. Any reasonable suspicion of fraud, (regardless of materiality) or other unlawful acts including, but not limited to, theft, forgery, credit/debit card fraud, or any other act of unlawful taking, waste, or abuse of, or official misconduct, as defined in Tennessee Code Annotated § 39-16-402, involving public money, property, or services shall, upon discovery, be promptly reported in writing by the auditor to the Comptroller of the Treasury, State of Tennessee, who shall under all circumstances have the authority, at the discretion of the Comptroller, to directly investigate such matters. Not withstanding anything herein to the contrary, the Comptroller of the Treasury, State of Tennessee, acknowledges that the auditor's responsibility hereunder is to design its

audit to obtain reasonable, but not absolute, assurance of detecting fraud that would have a material effect on the financial statements, as well as other illegal acts or violations of provisions of contracts or grant agreements having a direct and material effect on financial statement amounts. If the circumstances disclosed by the audit call for a more detailed investigation by the auditor than necessary under ordinary circumstances, the auditor shall inform the organization's management and those in charge of governance in writing of the need for such additional investigation and the additional compensation required therefor. Upon approval by the Comptroller of the Treasury, an amendment to this contract may be made by the organization's management, those charged with governance, and the auditor for such additional investigation.

8. **Group Audits**. The provisions of Section 8 relate exclusively to contracts to audit components of a group under AU-C 600. (See definitions in AU-C 600, Paragraph 11.) Section 8 is only applicable to an auditor that audits a component (e.g., a fund, component unit, or other component) **of a county government that is audited by the Division of Local Government Audit (LGA)**. Section 8 is intended to satisfy the communication requirements for the group auditor (LGA) to the component auditor under AU-C 600.

a) The Division of Local Government Audit (LGA) shall be considered the "group auditor" for any contract to audit a component of an applicable county government. LGA shall present the county's financial statements in compliance with U.S. Generally Accepted Accounting Principles (GAAP) as promulgated by the Governmental Accounting Standards Board (GASB). LGA shall conduct the audit in accordance with auditing standards generally accepted in the United States of America and the auditing standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States.

b) The contracting auditor shall be considered the "component auditor" for purposes of this section.

c) The financial statements audited by the component auditor should be presented in accordance with GAAP as promulgated by GASB. If the financial reporting framework for any component does not conform to this basis, the financial reporting framework should be disclosed in Section 10 (Special Provisions). (Component financial statementsthat are not presented using the same financial reporting framework as the county's financial statements may cause this contract to be rejected.)

d) The component auditor shall conduct the component audit in accordance with auditing standards generally accepted in the United States of America and the auditing standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States.

e) The component auditor shall cooperate with LGA to accomplish the group audit. It is anticipated that LGA will make reference to the component auditor's report in the group audit report. Should LGA find it necessary to assume responsibility for the component auditor's work, the terms, if any, shall be negotiated under a separate addendum to this contract.

f) The component auditor shall follow the ethical requirements of *Government Auditing Standards* and affirms that the component auditor is independent to perform the audit and will remain independent throughout the course of the component audit engagement.

g) The component auditor affirms that the component auditor is professionally competent to perform the audit. LGA may confirm certain aspects of the component auditor's competence through the Tennessee State Board of Accountancy.

h) The component auditor will be contacted via email by the LGA's Audit Review Manager with the estimated date of the conclusion of LGA's audit of the county government. The component auditor agrees to **update subsequent events** between the date of the component auditor's report and the date of the conclusion of LGA's audit of the county government. Additional subsequent events should be communicated via email to LGA's Audit Review Manager.

i) The component auditor shall read LGA's audited financial statements for the county government for the previous fiscal year noting in particular **related parties** in the notes to the financial statements, and **material misstatement** findings in the Findings and Questioned Costs Section. The previous year audited financial statements can be obtained from the Comptroller's website at www.comptroller.tn.gov. As required by generally accepted auditing standards, we have identified Management Override of Controls and Improper Revenue Recognition as presumptive fraud risks. The component auditor shall communicate to LGA (i.e., group management) on a timely basis **related parties** not previously identified by the group management in LGA's prior year audited financial statements. Related parties should be communicated via email to LGA's Audit Review Manager.

j) The component auditor's report should not be restricted as to use in accordance with AU-C 905.

k) Sections 1-7 and Sections 10-14 of this contract are also applicable to the component auditor during the performance of the component audit.

9. **Municipal Chart of Accounts Crosswalk**. The provisions of Section 9 relate exclusively to contracts to audit of a municipality, municipality's fund(s), and municipality's school board of education. The auditor shall convert respective municipal audited financial data into a condensed chart of accounts by use of a Microsoft Excel crosswalk tool prescribed by the Comptroller of the Treasury, State of Tennessee, **or** if a respective municipality, municipality's fund(s), or municipality's school board of education chooses to convert their own audited financial data by use of the crosswalk, the auditor shall verify the accuracy of their conversion. The completed condensed chart of accounts crosswalk in Microsoft Excel format shall be filed with the Comptroller of the Treasury, State of Tennessee, by the auditor when the audited financial report is submitted.

10. (Special Provisions) **See attached Addendum and Knox County Appendix. This contract also includes for the following separate, but related, organizations for which separate audit reports will be filed: Emergency Communications District, Knoxville - Knox County Planning Commission and Geographic Information Systems. Note that a separate contract will also result in the filing of separate reports covering (1) the Knox County Schools - Internal School Funds and (2) Knox County Retirement and Pension Board and System.**

11. In consideration of the satisfactory performance of the provisions of this contract, the organization shall pay to the auditor the fee(s) listed below. (Fees may be fixed amounts or estimated.)

Fixed Contract Fee:
Audit **$380,500.00**
Municipal Chart of Accounts Crosswalk **$0.00**
Total Fixed Contract Fee **$380,500.00**
or
Estimated Contract Fee:
Audit
Municipal Chart of Accounts Crosswalk
Total Estimated Contract Fee

(If not a fixed amount, an estimated contract fee should be furnished to the governing unit for budgetary purposes. A schedule of fees and/or rates should be set forth below. Interim billings may be arranged with consent of both parties to this contract.) Provision for the payment of fees under this agreement has been or will be made by appropriation of management and those charged with governance.

SCHEDULE OF FEES AND/OR RATES:

See assumptions in Addendum related to major programs. Also, per Addendum, additional accounting and auditing work or consulting services beyond the scope of the audit will be provided at the Firm's hourly rates shown in the Addendum. Additional fees will also be incurred in the contract (at hourly rates) for any additional accounting assistance and audit time related to adoption of new or revised audit or accounting standards.

12. As the authorized representative of the firm, I do hereby affirm that:

- our firm and all individuals participating in the audit are in compliance with all requirements of the Tennessee State Board of Accountancy and;
- our firm has participated in an external quality control review at least once every three (3) years, conducted by an organization not affiliated with our firm, and that a copy of our most recent external quality control review report has been provided to the organization and the office of the Tennessee Comptroller of the Treasury approving this contract;
- all members of the staff assigned to this audit have obtained the necessary hours of continuing professional education required by *Government Auditing Standards;*
- all auditors participating in the engagement are independent under the requirements of the American Institute of Certified Public Accountants and *Government Auditing Standards*.

13. This writing, including any amendments or special provisions, contains all terms of this contract. There are no other agreements between the parties hereto and no other agreements relative hereto shall be enforceable, unless entered into in accordance with the procedures set out herein and approved by the Comptroller of the Treasury, State of Tennessee. In the event of a conflict or inconsistency between this contract and the special provisions contained in paragraph 10 of this contract, the special provision(s) are deemed to be void. Any changes to this contract must be agreed to in writing by the parties hereto and must be approved by the Comptroller of the Treasury, State of Tennessee. All parties agree that the digital signatures, that is, the electronic signatures applied by submitting the contract, are acceptable as provided for in the Uniform Electronic Transaction Act. Any paper documents submitted related to this contract will be converted to an electronic format and such electronic document(s) will be treated as the official document(s).

14. If any term of this contract is declared by a court having jurisdiction to be illegal or unenforceable, the validity of the remaining terms will not be affected, and, if possible, the rights and obligations of the parties are to be construed and enforced as if the contract did not contain that term.

Audit firm	Governmental Unit or Organization
By	By
Signature	Signature
Title/Position:	Title/Position:
E-mail address:	E-mail address:
Date:	Date:

Approved by the Comptroller of the Treasury, State of Tennessee

For the Comptroller:

By

Date:

RLA-18243 **R-26-3-902**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: PUBLIC BUILDING AUTHORITY

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving a Sub-Easement Agreement between Knox County and Peace Communications, LLC to continue leasing space in the Summer Place facility in the annual amount of $268,891.32 with a 3% increase realized annually for the next ten (10) years with two (2) 5-year additional options for renewal.
(Public Building Authority)

Attachments

Resolution

Sub-Easement Agreement

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING A SUB-EASEMENT AGREEMENT BETWEEN KNOX COUNTY AND PEACE COMMUNICATIONS, LLC TO CONTINUE LEASING SPACE IN THE SUMMER PLACE FACILITY IN THE ANNUAL AMOUNT OF $268,891.32 WITH A 3% INCREASE REALIZED ANNUALLY FOR THE NEXT TEN (10) YEARS WITH TWO (2) 5-YEAR ADDITIONAL OPTIONS FOR RENEWAL.

RESOLUTION: **R-26-3-902**

REQUESTED BY: **PUBLIC BUILDING AUTHORITY**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Knox County holds a permanent easement in certain property located at 500 West Summit Hill Drive and known as the Summer Place Tower (the "Tower"); and

WHEREAS, Peace Communications, LLC desires to continue to use and occupy approximately 13,846 square feet located on the first (1st) and second (2nd) floors of the Tower; and

WHEREAS, Knox County desires and agrees to grant unto Peace Communications, LLC a sub-easement for this purpose as further detailed in the attached Sub-Easement Agreement; and

WHEREAS, the proposed Sub-Easement Agreement is effective for a term of ten (10) years, commencing on March 31, 2026 and continuing through and including March 30, 2036 and may be renewed for two (2) additional five-year periods for a total potential term of twenty (20) years; and

WHEREAS, the Sub-Easement Agreement provides for a rental payment in the amount of $268,891.32 for the first year of the term and increasing by three percent (3%) per year for the initial term and all renewal terms.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Sub-Easement Agreement with Peace Communications, LLC to continue leasing space in the Summer Place Tower located at 500 West Summit Hill Drive is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, the Sub-Easement Agreement with Peace Communications, LLC to continue leasing space in the Summer Place Tower located at 500 West Summit Hill Drive shall be executed subject to such amendment or action not affecting the substantive provisions of the agreement as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

SUB-EASEMENT AGREEMENT

THIS SUB-EASEMENT AGREEMENT ("Agreement") is made and entered into on this __ day of _____, 2026, by and between KNOX COUNTY, TENNESSEE, a political subdivision of the State of Tennessee, hereinafter referred to as "Grantor", and PEACE COMMUNICATIONS, LLC, a Tennessee limited liability company, hereinafter referred to as "Grantee."

W I T N E S S E T H:

1.a. THE SP EASEMENT: Grantor is a party to that certain Grant of Permanent Easement (the "SP Easement"), dated as of August 1, 2020, by and among the United States of America (the "United States"), Tennessee Valley Authority ("TVA") and Grantor. Pursuant to the SP Easement, Grantor holds a permanent easement in that certain property known as the Summer Place Tower, located at 500 West Summit Hill Drive, Knoxville, Tennessee (the "Tower"), which easement is expressly subject to the terms, conditions, reservations, restrictions, exceptions and limitations stated therein. The SP Easement is attached hereto as EXHIBIT 1 and is incorporated herein by reference.

1.b. THE LEASE: Pursuant to the Assignment and Assumption of Lease, dated as of June 30, 2023, by and among the Nexus Group Inc, Peace Communications LLC, and Knox County, Tennessee, Grantee was assigned all of the right, title, and interest as tenant under the Lease Agreement by and between the Tennessee Valley Authority and Technology 2020, dated as of February 10, 2006, as amended and further assigned as set out in the June 30, 2023 Assignment and Assumption of Lease, (the "Lease"). With the exception of the provisions of the Lease regarding the term of the Lease and the amount of Rent owed by Grantee to Grantor, this Sub-Easement Agreement is expressly subject to the terms, conditions, reservations, restrictions, exceptions, and limitations stated in the Lease. The Lease is attached hereto as EXHIBIT 2 and is incorporated herein by reference.

2. GRANT OF A SUB-EASEMENT IN THE PREMISES: Subject to and upon the terms, provisions and conditions hereinafter set forth and in the SP Easement and in the Lease, and each in consideration of the duties, covenants and obligations of the other hereunder, Grantor does hereby grant unto Grantee a sub-easement in approximately 13,846 square feet located on the first (1st) and second (2nd) floors of the Tower, as shown on the site plan attached hereto and made a part hereof as EXHIBIT 3 (hereinafter called the "Premises"), which shall include the right to occupy the Premises for the entire term hereof.

3. AGREEMENT SUBORDINATE TO SP EASEMENT AGREEMENT AND LEASE: This Agreement shall at all times be subordinate to the terms of the SP Easement and the terms of the Lease, and Grantee's interest pursuant to this Agreement shall not extend to the underlying fee interest in the Premises held by the United States and TVA. To the extent any rights granted to Grantee herein are greater than or contrary to those granted to Grantor in the SP Easement or the Lease, or are contrary to Grantor's obligations under the SP Easement or the Lease, such rights shall be unenforceable.

4. USE: Grantee and its clients shall use the Premises only for office space and to provide co-location, disaster recovery, business continuity, data storage and protection, and other datacenter and managed IT, network and "Cloud" services and for related office use. Grantee agrees that it will not use or permit the use of the Premises or any part thereof for any other business or purpose without the prior written consent of Grantor, which consent Grantor may withhold in its sole and absolute discretion. Grantor's said consent shall also be required for any agreements between Grantee and any third parties for the use of data center space and the provision of data center services.

5. LIMITATIONS: This Agreement is subject to utility easements, both recorded and unrecorded, all applicable zoning ordinances, and all other encumbrances of record. Grantor reserves the right to install, maintain, use, repair, and replace such pipes, duct work, conduits, utility lines, wires, vents, and the like through the area above the ceiling, the columns and the space surrounding the columns, partitions, in or beneath floor slabs, on or below the Premises, or other locations as may be reasonably necessary for the servicing of the Premises or other portions of the Tower; provided, however, Grantor agrees to use commercially reasonable efforts not to disturb Grantee's use of the Premises in connection with the performance of such work.

6. TERM; RENEWAL OPTION:

(a) Term. The term (the "Term") of this Agreement shall be ten years, commencing on March 31, 2026 (the "Commencement Date") and continuing through and including March 30, 2036 (the "Expiration Date"); provided, however, if the SP Easement terminates prior to the expiration of the Term, this Agreement shall terminate upon the expiration of the SP Easement.

(b) Early Termination. Both parties shall have an ongoing right to terminate this Agreement at any time prior to the Expiration Date upon at least ninety (90) days' prior written notice.

(c) Renewal Option. Grantee shall have the option (the "Renewal Option") to renew this Agreement for two additional five-year periods for a total potential term of twenty years. Each additional five-year period shall be subject to Grantee's giving Grantor prior written notice of its desire to renew this Agreement at least 180 days before the end of the then-current term.

7. RENT: As consideration for the use and occupancy of, and as rental for the Premises, Grantee promises and agrees to pay Grantor, for the first year of the term of this Agreement, the amount of Two Hundred Sixty-Eight Thousand Eight Hundred Ninety-One Dollars and Thirty-Two Cents ($268,891.32). The Rent shall increase by three percent (3%) per year for the initial Term and all Renewal Terms.

8. RENTAL DUE DATES: The monthly rental payments of $22,408.61, as amended, shall be payable in advance, and without demand, commencing on April 1, 2026, and thereafter on the first day of each succeeding month throughout the Term and all Renewal Terms of this Agreement.

9. PLACE OF PAYMENT: Grantee shall pay all rent and other sums payable by Grantee to Grantor pursuant to the terms hereof to Grantor at such addresses as Grantor or its agents may designate in writing from time to time during the Term hereof. As of the date of this Agreement, the remit to address for the payment of rent and other sums to Grantor is:

Public Building Authority
P.O. Box 2505
Knoxville, Tennessee 37901

10. GRANTEE'S ACCESS TO THE PREMISES: No more than five (5) employees of Grantee may have access to the Premises. Those employees shall be approved to have access. Said approval will be by Grantor in its sole and absolute discretion. The employees will be badged by PBA and must wear those badges when in the Tower. The same approval and badging process will apply to Grantee's clients. Grantee shall give card access badges to their clients so the clients can access their servers within the Premises as needed. Grantee shall pay Grantor $20.00 per card access badge for new cards and cards that are lost or not returned to the Grantor.

11. MAINTENANCE AND REPAIRS, UTILITIES: REFER TO LEASE.

12. ALTERATIONS: REFER TO LEASE.

13. HAZARDOUS MATERIALS AND GRANTEE'S ENVIRONMENTAL COVENANTS: Grantee shall not use or store any Hazardous Materials on the Premises. In the event Hazardous Materials are discovered in the Premises which are present as a result of Grantee's use or occupancy of the Premises or as a result of any acts or omissions of Grantee's employees, agents, contractors, invitees, licensees or any person who comes upon the Premises with Grantee's permission, Grantee, at its sole expense, shall immediately institute and complete, on an emergency basis, all proper, requisite, and thorough procedures for the removal of the Hazardous Materials in accordance with all applicable laws, rules, ordinances, and regulations.

Notwithstanding anything to the contrary contained herein, Grantee shall have no liability or responsibility for Hazardous Materials which are (i) on, in or under the Premises prior to the date of Grantee's occupancy thereof, or (ii) as consistent with the terms of the SP Easement in relation to the acts or omissions of Grantor, TVA or any of their agents, employees or contractors.

For purposes of this Agreement, the term "Hazardous Materials" is defined as any substance, chemical or material that is prohibited, regulated or controlled by any federal, state or local statute, law or ordinance enacted for the protection of the environment ("Environmental Laws"), including, without limitation, the Comprehensive Environmental Response Compensation and Liability Act of 1980, as amended (42 U.S.C. §§9601, et seq.), the Hazardous Materials Transportation Act, as amended (49 U.S.C. §§5101, et seq.), and the Resource Conservation and Recovery Act, as amended (42 U.S.C. §§6801 et seq.). The term "Hazardous Materials" does not include substances of kinds and in amounts ordinarily and customarily used or stored in properties similar to the Premises for the purposes of cleaning or other maintenance or operations and otherwise in compliance with all Environmental Laws.

14. SIGNAGE: Grantee shall not erect, place or maintain any sign on the interior or exterior of the Premises nor on the glass of any window or door. Grantee shall not erect or maintain any signage or other advertising on the exterior of the Tower.

15. TAXES: Grantee also agrees to pay all taxes and assessments of every kind or character assessed upon or against (i) the Premises during the Term and the Renewal Term, if applicable, (ii) any and all personal property of Grantee now or hereafter placed by Grantee in or upon the Premises, (iii) by virtue of any alterations made by Grantee to the Premises, and (iv) the interest provided to Grantee under this Agreement.

16. ASSIGNMENT OR GRANT OF SUB-EASEMENT: Grantee shall not assign this Agreement or grant a sub-easement in the Premises without the Grantor's prior written consent, which will not be unreasonably withheld.

17. COMPLIANCE WITH LAW: Grantee shall promptly execute, fulfill and comply with all valid laws, rules and regulations made by any competent governmental authority which are applicable to Grantee's use of the Premises.

18. LIABILITY INSURANCE: Grantee agrees to obtain and maintain public liability and property damage insurance covering its operations and the Premises. Such public liability insurance shall have a combined single limit coverage of at least Three Million Dollars ($3,000,000.00) and shall name the United States, TVA, Grantor and PBA as additional insureds. Grantee shall furnish Grantor certificates of all such insurance issued by a reputable insurance company or companies which shall be licensed to do business in the State of Tennessee, which shall be reasonably acceptable to the Grantor, and shall have an A.M. Best Rating of A-7 or greater.

19. CASUALTY INSURANCE: Grantor shall maintain a policy of property and casualty insurance on the Tower and the Premises insuring against loss or damage to improvements caused by fire, flood, explosion and other hazards. Grantee shall be responsible for maintaining property and casualty insurance on its fixtures and personal property that Grantee maintains or stores on the Premises. Grantee agrees not to keep upon the Premises any articles or goods or do anything which may be prohibited by the standard form of fire insurance policy or cause such policy to be canceled. In the event the insurance premiums applicable to fire and extended coverage insurance covering the Tower and the Premises shall increase by reason of any use of the Premises made by the Grantee, then Grantee shall pay to Grantor such increase in insurance premiums as shall be occasioned by said use.

20. FIRE AND CASUALTY DAMAGE: In the event of the total destruction of the Premises by fire, storm, tornado, or other casualty, or if such casualty materially affects Grantee's ability to access and/or conduct business from the Premises, then Grantee shall have the right to terminate this Agreement upon written notice to Grantor within sixty days after the occurrence of the casualty. Except as hereinafter provided, the failure of Grantee to give such written notice within sixty days after the occurrence of the casualty shall be deemed a waiver by Grantee of its right to terminate this Agreement by reason of such casualty. Within a reasonable time after the date on which Grantee elects (or is deemed to have elected) not to terminate the Agreement by reason of the casualty, but in no event more than sixty days thereafter, Grantor shall, at its expense, promptly commence to rebuild or repair the improvements to substantially the condition in which

they were immediately prior to the happening of the casualty; provided, however, that Grantor's obligation to restore the Premises is limited to the amount of insurance proceeds paid as a result of the casualty. If Grantor fails to commence such rebuilding or repairing within sixty days after the date on which Grantee elects (or is deemed to have elected) not to terminate the Agreement by reason of the casualty or thereafter fails to complete the same within one hundred fifty days after commencing such work, then at the option of Grantee, this Agreement shall forthwith terminate, with no liability on the part of Grantor, upon thirty days' prior written notice given to Grantor on or after the expiration of such one hundred fifty day period, unless Grantor commences or completes (whichever is applicable) such repair or rebuilding on or before the expiration of such thirty day period, in which event this Agreement shall continue. The rental payable hereunder shall abate in proportion to the extent to which such damage renders the Premises untenantable or unsuitable for the purposes for which the Premises are utilized by Grantee; and if such damage is so extensive as to render the Premises completely untenantable or unsuitable for such purposes, the rent shall completely cease and abate until Grantor has repaired or restored the improvements as provided herein.

Neither Grantor, PBA, the United States, nor TVA shall have any liability whatsoever to Grantee or any third party for any damages of any kind whatsoever to Grantee's property from any cause whatsoever which is beyond the control of Grantor, PBA, the United States, and/or TVA.

21. WAIVER OF SUBROGATION: Insofar as and to the extent that this Section may be effective without invalidating or making it impossible to secure insurance coverage as provided in this Agreement from responsible insurance companies doing business in the state of Tennessee, Grantor and Grantee hereby expressly waive any cause of action or right of recovery which either may have hereafter against the other for any loss or damage to the Premises or the equipment, fixtures, furniture, business records, inventory or any other personal property belonging to either, caused by fire, explosion or other risk covered by the property and casualty policy carried by Grantor and Grantee pursuant to Section 19 hereof, and each party hereto shall obtain a waiver from any insurance carrier with which it carries fire insurance and/or extended coverage insurance covering the Premises, or the contents thereof belonging to either, releasing its subrogation rights as against the other party.

22. CONDEMNATION: If during the term hereof all or substantially all of the Premises (or Grantee's reasonable access to and from the Premises) shall be taken in any condemnation or eminent domain proceedings, this Agreement shall thereupon terminate. In such event the obligation to pay rent and the Grantee's right of possession hereunder shall terminate on the date of such taking. Any rent paid in advance shall be apportioned as of the date of such taking and Grantee's portion thereof shall be refunded to Grantee.

All damages for any condemnation of all or any part of the Premises shall belong to the Grantor. Grantee, however, shall have the right to claim and recover from the condemning authority such compensation as may be separately awarded or recoverable by Grantee in Grantee's own right under applicable law.

23. GRANTOR'S RIGHT OF ENTRY: Grantor or Grantor's agent shall have the right to enter the Premises for any purpose upon four hours' written notice, which may include notice by email; provided, however, no notice is required (i) in the event of an emergency, (ii) in the event

preventative maintenance is required, and (iii) for entry into the Premises by custodial and janitorial personnel. Grantor shall ensure that all Building employees and all employees of any of Grantor's contractors that will access the Premises shall have satisfactorily completed background checks.

24. DEFAULT: The following events shall each be deemed to be an event of default (an "Event of Default") by Grantee under this Agreement:

(i) Grantee shall fail to pay any installment of the rent within ten (10) days after receipt of written notice of such nonpayment.

(ii) Grantee shall fail to comply with any other term, provision, or covenant of this Agreement within fifteen (15) days after written notice from Grantor, provided that in the event that the default is of such a nature that it cannot reasonably be cured within such fifteen (15) day period, then no default shall be deemed to have occurred if Grantee commences to cure the default within such fifteen (15) day period and thereafter pursues the cure with reasonable diligence.

(iii) Grantee abandons the Premises for a period of two consecutive months; provided, however, that Grantee's mere vacating of the Premises during the Term hereof shall not constitute an Event of Default so long as Grantee continues to timely pay rent due Grantor under this Agreement and maintains the insurance coverage required pursuant to Sections 18 and 19 of this Agreement, and Grantee otherwise continues to perform its obligations under this Agreement.

(iv) Grantee takes any action, or fails to take any action, that would constitute a breach by Grantor under the SP Easement or the Lease.

(v) Grantee shall make an assignment for the benefit of creditors.

(vi) Grantee shall file a petition under any chapter of the United States Bankruptcy Code, as amended, or under any similar law or statute of the United States or any state thereof; or an involuntary bankruptcy petition is filed against Grantee which is not dismissed within sixty (60) days after the filing thereof.

(vii) A receiver shall be appointed for all or substantially all of the assets of Grantee and the receivership shall not be terminated within sixty (60) days after such appointment.

25. REMEDIES: Upon the occurrence of an Event of Default specified in Section 24 hereof, Grantor shall have the option to pursue any one or more of the following remedies without any notice or demand whatsoever:

(i) Terminate this Agreement, in which event Grantee shall immediately surrender possession of the Premises to Grantor, and if Grantee fails to do so, Grantor may without prejudice to any other remedy which it may have for default hereunder or arrearages in rent, enter upon and take possession of the Premises.

(ii) Enter upon and take possession of the Premises and expel or remove Grantee and any other occupant therefrom (using such force as may be reasonably necessary) without having terminated this Agreement, without being deemed guilty of any manner of trespass and without prejudice to any other remedy which it may have for default hereunder or arrearages in rent.

If Grantor either (i) elects to terminate this Agreement by reason of an Event of Default, or (ii) elects to repossess the Premises without terminating this Agreement, in either event Grantee shall be liable for and shall pay to Grantor all rent and other indebtedness accrued to the date of such termination or repossession, and Grantor, its agent or attorney, may at its option (but without any obligation), relet the same for the remainder of the Term at the best rent Grantor, its agent or attorney, may obtain, and Grantee shall make good the deficiency if the reletting is for less than the rent reserved under this Agreement. If Grantor fails to relet the Premises after terminating or repossessing the Premises, Grantee shall pay to Grantor as damages a sum or sums equal to the amount of rent Grantee is obligated to pay Grantor under this Agreement for the remainder of the Term hereof as and when the same becomes due under the terms of this Agreement, together with the unpaid rent earned at the time of repossession. Actions to collect amounts due by Grantee may be brought from time to time, on one or more occasions, without the necessity of Grantor's waiting until expiration of the Term.

26. INDEMNITY: Grantee shall indemnify and save the United States, TVA, Grantor, and PBA harmless of, from and against any and all claims, demands, actions, losses, costs or expenses, including reasonable attorney's fees, court costs and other expenses of litigation of any nature whatever, arising out of (i) the negligence of Grantee, its employees, agents, contractors or invitees, (ii) Grantee's breach of this Agreement or any other Event of Default, and (iii) Grantee's use and occupation of the Premises, including but not limited to any maintenance, repairs and permitted alterations performed by Grantee; provided, however, in no event shall Grantee have any liability for, or any duty to defend, indemnify or hold the United States, TVA, Grantor, and PBA harmless from, any and all claims, demands, actions, losses, costs or expenses, including reasonable attorney's fees, court costs and other expenses of litigation of any nature whatever, arising out of (i) the gross negligence of Grantor or its employees, agents, contractors or invitees, or (ii) Grantor's breach of this Agreement.

27. ATTORNEY'S FEES: If, on account of breach or default by Grantee in the performance of its obligations hereunder, it shall become necessary for Grantor to employ an attorney to enforce or defend any of its rights or remedies hereunder, then any reasonable amounts incurred by Grantor as attorney's fees, court costs and expenses of litigation shall be paid by Grantee.

28. WARRANTY OF POSSESSION: Grantor covenants and warrants to Grantee that so long as no Event of Default has occurred or is continuing beyond any applicable cure period, Grantee shall and may peaceably and quietly have, hold, occupy, use and enjoy and shall have the full, exclusive and unrestricted use and enjoyment of, all of the Premises during the entire Term.

29. SURRENDER OF POSSESSION: Upon the expiration of the Term or the earlier termination of this Agreement, Grantee shall surrender the Premises in substantially as good condition as the same were when Grantee accepted possession thereof from Grantor, excepting only

(i) reasonable wear and tear, (ii) deterioration or depreciation attributable to the elements or to lapse of time, (iii) destruction or damage caused by Grantor, or its agents, employees, contractors or invitees, or (iv) the destruction of or damage to the Premises, in whole or in part, by causes which are not reasonably within Grantee's reasonable control.

30. TRANSFER BY GRANTOR: Grantor shall have the right to transfer and assign, in whole or in part, all of its rights and obligations under this Agreement, subject to the SP Easement.

31. EXPENSES AND PERFORMANCE: Irrespective of whether or not expressly so stated, all of the duties, covenants, obligations and agreements of each party hereto, respectively, and all acts and things done or provided to be done by each party hereto, respectively, shall be fully and punctually kept, performed and complied with by such party at such party's sole risk, cost, expense and liability and without cost, risk, expense or liability to or on the part of the other party.

32. PAYMENT OF OBLIGATIONS FOLLOWING TERMINATION: No termination of this Agreement, regardless of how such termination may be brought about or occur, by or insofar as it relates to or affects any party hereto, shall relieve any party hereto of any duties, obligations or liabilities which shall theretofore have accrued or become payable or performable by such party.

33. NOTICE: Except for any notice required under applicable law to be given in another manner, any notice, report, demand or other instrument required or permitted to be given by this Agreement shall be given or made in writing, and shall be, as elected by the person giving such notice, served personally, delivered by a nationally recognized overnight courier service, or mailed in the United States Mail by prepaid, registered or certified mail, return receipt requested, as follows:

If to Grantor:

Knox County, Tennessee
c/o Public Building Authority
c/o Jayne Burritt, Administrator, CEO
400 Main Street, Suite M-22
Knoxville, Tennessee 37902

and to:

Knox County Law Director
400 Main Avenue, Suite 612
Knoxville, Tennessee 37902

If to Grantee:

Peace Communications, LLC
P.O. Box 909
Chattanooga, Tennessee 37401
ATTN: James E. Peace, CEO

Any notice given in accordance with the provisions of this Section shall be deemed to be effective on the date of delivery in the event of personal service or delivery by a nationally recognized overnight courier service, or, if mailed, on the date which is three (3) business days after the notice is deposited in a regularly maintained United States Mail receptacle, postage

prepaid, registered or certified mail, return receipt requested. Each party may give written notice in the manner specified herein to the other party of a change of its address for the purposes of this Section, which thereafter, until changed by like notice, shall be the address of such party for all purposes of this Agreement.

34. ESTOPPEL CERTIFICATES: Within fifteen (15) days after the request of either party hereto, the other party agrees to execute an estoppel certificate or other agreement certifying to the requesting party such matters regarding this Agreement as the requesting party may reasonably request.

35. COMMISSIONS: No commissions are owed to any realtor or broker as a result of the execution of this Agreement.

36. WAIVER: The failure of either party to insist upon the strict performance by the other party of any term, condition or covenant on such party's part to be performed pursuant to the terms of this Agreement or to exercise any option, right, power or remedy contained in this Agreement shall not be deemed nor construed as a waiver of such performance or relinquishment of such right now or subsequent hereto. No waiver or waivers of any breach or default or breaches or defaults by either party of any term, condition or liability or of performance by the other party of any duty or obligation hereunder, including without limitation, the acceptance by Grantor of payment by Grantee of any rentals at any time or in any manner other than as herein provided, shall be deemed a waiver or waivers of subsequent breaches or defaults of any kind, character or description under any circumstances.

37. ENTIRE AGREEMENT, AMENDMENTS: This Agreement embodies the entire agreement between the parties hereto relative to the subject matter hereof and supersedes all prior written and oral agreements and understandings with respect to such subject matter. This Agreement cannot be amended, rescinded, supplemented, or modified except in writing, signed by the parties hereto. This Section 37 may not be orally waived.

38. SECTION TITLES: The titles to the sections of this Agreement are inserted and included solely for convenience and shall never be considered or given any effect in construing this Agreement, or any provision hereof, or in connection with the duties, obligations or liabilities of the respective parties hereto or in ascertaining intent, if any question of intent should arise.

39. NO RECORDATION: Neither party shall record this Agreement or a memorandum thereof in the Knox County Register's Office.

40. BINDING EFFECT: This Agreement and all of its terms and provisions shall be binding upon and inure to the benefit of the parties hereto.

41. NO AGENCY: It is not the intention of the parties hereto to create under any circumstances, a partnership or principal-agent relationship. The rights, duties, obligations and liabilities of Grantor and Grantee are separate and not joint or collective, and nothing herein shall ever be construed to create a partnership or relationship of principal-agent under the laws of the State of Tennessee. Grantor does not consent to the imposition of any mechanic's or materialmen's lien against the Premises.

42. FORCE MAJEURE: Neither party hereto shall be liable in damages to the other party in the event such party is delayed or prevented from performing any of its obligations hereunder due to Force Majeure, which as used herein shall mean acts of God, earthquake, governmental orders, actions, regulations or directives, civil emergencies, war, weather, natural occurrences, accidents, strikes, plague, epidemic, pandemic, lockouts or other industrial disturbances, difficulty in obtaining materials, telecommunication breakdowns, power shortages or outages, and any other causes, whether of the kind herein enumerated or otherwise, which are not reasonably within the control of the party claiming suspension and which by the exercise of due diligence such party is unable, wholly or in part, to prevent or overcome, provided that the foregoing shall not be applicable to relieve any party hereto from the timely payment of any monetary obligation due hereunder.

43. SEVERABILITY: Should any portion of this Agreement be found invalid for any reason the remainder of this Agreement shall remain in full force and effect.

44. CONTROLLING LAW, VENUE: This Agreement shall be governed by and construed in accordance with the substantive laws of the United States and the State of Tennessee. The Chancery Court and/or the Circuit Court of Knox County, Tennessee shall have exclusive and concurrent jurisdiction of any disputes which arise hereunder, and the parties agree that they are subject to the personal jurisdiction thereof and waive any defenses based on personal jurisdiction, venue, and inconvenient forum.

45. MAINTENANCE: Section 12.(b)(i) of the Lease Agreement is deleted in its entirety and replaced with the following:

> The Grantee shall be responsible for maintenance of the data centers and shall provide testing reports for any safety systems maintained within its purview promptly after any service or testing of such systems but in no case less than annually. Grantee shall also provide immediate notice of any deficiencies and support to correct deficiencies in such systems as identified by service or inspection. This explicitly includes any fire alarm or oxygen-depleting fire suppression systems maintained by the Grantee.

46. GENERATOR & BOLLARDS: The Grantee shall have the option to construct a new generator outside of the Tower after obtaining the proper permitting and subject to the approval of the plans for and location of the new generator by the United States, TVA, Grantor, and PBA in each entity's sole and absolute discretion. The Grantee shall also have the option to install additional bollards around its ground floor space on the Summit Hill Dr. side of the Tower after obtaining the proper permitting and subject to the approval of the plans for and location of the bollards by the United States, TVA, Grantor, and PBA in each entity's sole and absolute discretion. Grantee will be responsible for all costs of the construction, installation, and maintenance of the generator and the bollards.

47. Exhibit 4 (page 19 of 19) of the Lease Agreement is deleted in its entirety.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the latest date written below.

KNOX COUNTY, TENNESSEE

BY: _____
Glenn Jacobs, Mayor

Date: _____

PEACE COMMUNICATIONS, LLC

BY: _____
James E. Peace,
Chief Executive Officer

Date: _____

KNOX COUNTY LAW DEPARTMENT

CONTRACT # 26-112

APPROVED AS TO LEGAL FORM

_____
Charles F. Sterchi, III, Chief Deputy Law Director

Date: _____

RLA-18247 **R-26-3-903**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Drucilla Stills, COUNTY COMMISSION
Department:	RETIREMENT AND PENSION
Requires Expenditure of Funds:	Funded in Current Budget:
Appropriation Required:	

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving the amendment and restatement of the Knox County Employee Disability Benefit Plan to eliminate the 90-day waiting period for disability benefits; remove the requirement that a participant exhaust accrued leave prior to disability approval and instead provide for payment of all accrued leave upon approval of disability benefits; and require that a participant be on approved leave and not actively working within two (2) weeks of applying for disability benefits and during the pendency of the disability review process. *(Retirement Board)*

Attachments

Resolution

Disability Plan 2026

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING THE AMENDMENT AND RESTATEMENT OF THE KNOX COUNTY EMPLOYEE DISABILITY BENEFIT PLAN TO ELIMINATE THE 90-DAY WAITING PERIOD FOR DISABILITY BENEFITS; REMOVE THE REQUIREMENT THAT A PARTICIPANT EXHAUST ACCRUED LEAVE PRIOR TO DISABILITY APPROVAL AND INSTEAD PROVIDE FOR PAYMENT OF ALL ACCRUED LEAVE UPON APPROVAL OF DISABILITY BENEFITS; AND REQUIRE THAT A PARTICIPANT BE ON APPROVED LEAVE AND NOT ACTIVELY WORKING WITHIN TWO (2) WEEKS OF APPLYING FOR DISABILITY BENEFITS AND DURING THE PENDENCY OF THE DISABILITY REVIEW PROCESS.

RESOLUTION: **R-26-3-903**

REQUESTED BY: **RETIREMENT BOARD**

PREPARED BY: **KENNERLY, MONTGOMERY & FINLEY, P.C.**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, Knox County Government (the "Employer") adopted the Knox County Employee Disability Benefit Plan, most recently amended and restated as of July 1, 2024 (the "Plan"), pursuant to Article VII of the Charter of Knox County, Tennessee (the "Charter"); and

WHEREAS, pursuant to the express terms of the Plan, the Knox County Retirement and Pension Board ("Board") has the right at any time to modify, alter or amend the Plan, in whole or in part, by instrument in writing duly executed, provided, however, that the Board shall not have the power or authority to adopt or approve any plan amendment, or take any other action, which thereby would increase the funding or financial obligations of the County either at the time of the action or in the future without notification to and express consent and funding by resolution from the Commission; and

WHEREAS, the Board, after consultation and deliberation, now wishes to amend the Plan, effective April 1, 2026, to simplify and clarify the disability process by eliminating the 90-day waiting period, removing the requirement that accrued leave be exhausted prior to disability approval and instead providing for payment of accrued leave upon approval, and establishing clear eligibility parameters requiring participants to be on approved leave or not otherwise actively working within two (2) weeks of disability application and during the pendency of review, all to promote consistency and administrative efficiency under the Plan; and

WHEREAS, having considered the effect of the proposed amendment and the Actuary's advice that the amendment, will increase the funding or financial obligations of the County within the meaning of Charter Section 7.04E, the Board concluded that the proposed amendment should be recommended for consideration and approval by the Commission by resolution, following adoption of such amendment by the Board; and

WHEREAS, the Board, at duly called public meetings on February 25, 2026 and March 23, 2026, adopted on two readings the amendment of the System; and

WHEREAS, copies of the System document have been previously filed for review with the Office of the Knox County Commission.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY, TENNESSEE, AS FOLLOWS:

Pursuant to Section 7.04E of the Charter, the Commission hereby consents to, and approves the adoption, funding and implementation of, the amendment and restatement of the Knox County Employee Disability Benefits Plan, effective April 1, 2026.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

KNOX COUNTY
EMPLOYEE DISABILITY BENEFIT PLAN

Effective ~~July~~ April 1, ~~2024~~2026

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KNOX COUNTY EMPLOYEE DISABILITY BENEFIT PLAN

THIS KNOX COUNTY EMPLOYEE DISABILITY BENEFIT PLAN hereby adopted this ~~24th~~ 23rd day of ~~June~~March, ~~2024~~ 2026 by Knox County Government (herein referred to as the "Employer").

W I T N E S S E T H:

WHEREAS, effective July 1, 1968, a system of employee benefits for Employees of Knox County known as "The Knox County Employee Benefit System" (herein referred to as the "System") was created and established pursuant to House Bill No. 886 of Chapter 246 of the 1967 Private Acts of the State of Tennessee and as subsequently governed by the Charter of Knox County (the "Charter"); and

WHEREAS, the voters of Knox County, Tennessee, by referenda in 2006 and 2012, ratified amendments to Article VII, Section 7.05, of the Charter, which authorized and directed the Knox County Retirement and Pension Board (the "Board") to establish, maintain and administer as plans of the System, separate, tax-qualified plans (referred to as "UOPP" and "STAR" and collectively as "Sheriff's Plans") for sworn officers regularly employed by the Knox County Sheriff's Office ("Officers"); and

WHEREAS, the stated intent of the System, including the Sheriff's Plans, is to provide a well-balanced program of retirement, disability and death benefits founded on concepts of sound actuarial principles in order that the System can, to as great an extent as possible, be considered sound as to the benefits and costs presently and in the future; and

WHEREAS, the Board shall not have the power or authority to adopt or approve any plan or plan amendment, or take any other action, which thereby would increase the funding or financial obligations of the County either at the time of the action or in the future without notification to and express consent and funding by resolution from the Commission. The intent of this provision is to restrict the power of the Board so that all plans, benefits, annuities or pensions are actuarially sound and actuarially funded from the date of their creation; and

WHEREAS, it is also the stated intention not to make changes or amendments to any plans of the System until the financial effect on any proposed change on the actuarial soundness of the plans has been determined on the basis of such competent actuarial, legal and other advice as the Board shall assemble and such information has been made available to all interested parties; and

WHEREAS, the Closed Defined Benefit Plan and UOPP have heretofore provided disability coverage to eligible Employees, and positions covered by STAR require disability benefits effective January 1, 2014; and

WHEREAS, the Board has determined that appropriate funding policy, and efficiency, economy and consistency in the administration of the System, dictate that, although disability

benefits for Participants covered by UOPP, Closed Defined Benefit Plan and Asset Accumulation Plan ("Asset Plan") who suffered the disability prior to January 1, 2014, should continue to be provided pursuant to UOPP and Closed Defined Benefit Plan, as the case may be, effective January 1, 2014, disability coverage as defined herein should be provided by this separate Plan for Participants of UOPP, STAR, Closed Defined Benefit Plan and Asset Accumulation Plan (but not the Teacher's Plan), and that such benefits shall be funded through and made available by a voluntary employees' beneficiary association, within the meaning of Section 501(c)(9) of the Internal Revenue Code (the "Code"), hereby established for the purpose of providing funds for the payment of the sick and accident benefits defined herein for Participants, survivors and Beneficiaries; and

WHEREAS, working with and on the recommendation of the Board, after notice, at public meetings on two readings, the Commission enacted Ordinance O-13-8-101, effective January 1, 2014, to provide in line of duty benefits for Participants who suffer disabilities resulting, directly or indirectly, from acts or risks undertaken as required in the performance of his or her duty, which Ordinance refers to the Plan for details, definitions and procedures; and

WHEREAS, after notice, at public meetings on two readings the Board adopted, and the Knox County Commission ("Commission") subsequently approved the Plan by resolution, reserving the power of the Board to hereafter amend the Plan from time to time;

NOW, THEREFORE, effective ~~July 1, 2024~~April 1, 2026, the Employer hereby amends and restates the Plan originally effective as of January 1, 2014, for the exclusive benefit of the Participants, survivors and Beneficiaries, on the following terms:

ARTICLE I – DEFINITIONS

When used in this Plan, the following words and phrases, where capitalized, shall have the meaning indicated unless otherwise defined or required by the context. Particular defined words or phrases may be used in this Plan as well as in UOPP, STAR or Other Plans of the System. When used in this document, such words or phrases refer to this Plan, except as specifically stated or unless otherwise required by the context. The Employer's intention in using these words and phrases is that they have a common meaning, and that they be interpreted in the same way, across this Plan, UOPP, STAR and Other Plans of the System.

1.01 "Active Participant" shall mean, with respect to any Plan Year, a Participant who has been credited with at least one (1) Hour of Service for the Plan Year.

1.02 "Actuary" shall mean the qualified actuary, who is a member of the American Academy of Actuaries, appointed by the Board to perform actuarial valuations and give other actuarial advice as directed or requested by the Board from time to time.

1.03 "Adjusted Earnings While Disabled" shall mean the product determined by multiplying a Participant's Earnings While Disabled for a particular period by the appropriate CPI Deflator, determined based on the Participant's Disability Date.

1.04 "Administrator" shall mean the Board.

1.05 Reserved.

1.06 "Asset Plan" shall mean the Knox County Asset Accumulation Plan, one of the component plans of the System.

1.07 "Beneficiary" shall mean the Participant's surviving Spouse or Dependent Children to the extent provided in Sections 5.10 and 5.11.

1.08 "Board" shall mean the Knox County Retirement and Pension Board created by the Charter. References to the Board in this Plan shall be deemed to include the executive director acting pursuant to delegations of authority and directions from the Board in connection with the administration of the Plan.

1.09 "Charter" shall mean the Charter of Knox County, Tennessee as amended from time to time.

1.10 "Child" or **"Children"** shall mean the natural or lawfully adopted child or children of a Participant.

1.11 "Closed Defined Benefit" or **"Closed DB"** shall mean the Knox County Closed Defined Benefit Plan.

1.12 "Code" shall mean the Internal Revenue Code of 1986 as in effect on the relevant date to be interpreted under this Plan. Reference to any section of the Code shall include that section, any Regulation promulgated thereunder, and any comparable section or sections of any future legislation that amends, supplements or supersedes said section.

1.13 "Commission" shall mean the Knox County Board of Commissioners.

1.14 "Compensation" shall mean the total salary paid by the Employer to the Employee for services performed for the Employer that is currently includible in gross income, excluding both clothing allowance and pay reimbursed for service performed for any outside entity, but including bonus and longevity pay, and amounts excluded from income pursuant to UOPP Section 4.04(a), STAR Section 4.03(a), or System Sections III-2.02(a) or VI-2.04(a) and Code §§ 125, 402(a)(8), 402(h) and 403(b), which is attributable to the period of his or her participation in the Plan. Consistent with the terms of the Plan, the Board may establish and amend from time to time such procedures as necessary or desirable in its discretion related to administration of Compensation, and the Board's determination of a Participant's Compensation shall be conclusive.

(a) Compensation shall not include any salary that is covered by any pension plan administered by the State of Tennessee.

(b) Compensation, for all Plan Years, shall exclude amounts in excess of $225,000 (or such other amount as determined in accordance with the cost-of-living adjustment procedures described in Code § 401(a)(17)). For purposes of applying this limit, Compensation is determined for a Plan Year on the basis of Compensation for the calendar year ending within the Plan Year. The limitation on Plan Year compensation under Code § 401(a)(17) shall be the limit in effect for the calendar year in which the Plan Year begins. Provided, however, that the § 401(a)(17) limit on Compensation shall be prorated for any short Plan Year.

(c) Compensation shall exclude elective amounts that are not includible in the gross income of the Participant by reason of Code § 132(f)(4).

(d) Post-Severance Compensation shall be treated as Compensation; provided, however, effective January 1, 2018, neither Compensation nor Post-Severance Compensation shall include payment for more than 43 days of unused accrued bona fide vacation leave cashout at Termination or Retirement.

(e) Compensation for a Plan Year shall not include amounts earned but not paid during the Plan Year solely because of the timing of pay periods and pay dates.

(f) Differential Wage Pay is treated as Compensation.

(g) Compensation includes amounts paid to a Participant who is Disabled.

(h) Compensation shall not include any amounts paid to an Employee for employment with the Employer in any one or more positions, where the Employee is regularly scheduled to work

less than 18-1/2 hours per week in such position(s), and after March 31, 2014, where the Employee has executed an acknowledgement and irrevocable waiver in form satisfactory to the Board that pay for such position(s) shall not count for benefit accrual under the Disability Plan, any Plan of the System, STAR or UOPP, and that the Employee will be entitled to no benefit under the Disability Plan, System, STAR or UOPP with regard to pay for such position(s).

(i) Compensation includes overtime paid to Participants, except that Compensation shall not include overtime paid to Participants in UOPP or STAR.

(j) Except as otherwise provided in this Section 1.14, Compensation shall not include a cash-out of unused accrued time off or a lump sum payment of any kind.

(k) Consistent with the definition of Compensation in UOPP, Compensation shall not include incremental increases paid to UOPP Officers in excess of 3% per year applied position-by-position on a base fixed as of December 31, 2022, as designated by the Sheriff's Office and recorded in the County payroll system.

1.15 "Consumer Price Index" or **"CPI"** shall mean the index for all urban consumers as measured by the United States city average for all items, published by the Bureau of Labor Statistics, and adjusted as may be necessary by the actuary for any change in the index or its base.

1.16 "Contract" or **"Policy"** means any life insurance policy, retirement income policy or annuity contract (group or individual) issued pursuant to the terms of this Plan. In the event of any conflict between the terms of this Plan and the terms of any Contract purchased hereunder, the Contract provisions shall control.

1.17 "CPI Deflator" shall mean the table established at least annually by the Board on the recommendation of the Actuary based on the Consumer Price Index and fixing a schedule of annual adjustments, tied to Disability Dates, to appropriately take account of national levels of wage inflation from the Disability Date in determining Adjusted Earnings While Disabled.

1.18 "Credited Service" shall mean the sum of an Employee's full and partial Years of Service, determined in years and months.

(a) If a Participant becomes ineligible to participate because he or she is in the Ineligible Class, or if an Employee in the Ineligible Class becomes a part of the Eligible Class, no period of Employment in the Ineligible Class shall be included in determining Credited Service.

(b) Credited Service includes an Employee's aggregate Credited Service under the Closed DB, Asset Plan, STAR and UOPP. However, if the same period is credited under more than one such plan, the calculation of Credited Service shall eliminate such duplication.

(c) Credited Service shall include an authorized Leave of Absence, but not beyond six (6) months, and may include time during which a Participant is receiving a Disability Benefit under this Plan, UOPP or Closed DB. A Leave of Absence extending beyond six (6) months granted

by a duly authorized Knox County official and approved by the Board shall not be counted as Credited Service but shall not be considered an interruption in Credited Service.

(d) Except as may be specifically provided in this Plan, Credited Service shall not include any time that a person is not an Employee. Credited Service shall be determined in years and full months.

(e) An elected or appointed public official shall be credited with Credited Service for each month in which such public official holds a Knox County office.

(f) Credited Service shall not include any period of employment by an Employee in any one or more positions, where the Employee is regularly scheduled to work less than 18-1/2 hours per week in such position(s), and after March 31, 2014, where the Employee has executed an acknowledgement and irrevocable waiver in form satisfactory to the Board that service in such position(s) shall not count for eligibility, vesting or benefit accrual under the Disability Plan, any Plan of the System, STAR or UOPP, and that the Employee will be entitled to no benefit under the Disability Plan, the System, STAR or UOPP with regard to service in such position(s).

(g) Subject to approval of the Board and provision of funding to the Disability Plan, Credited Service shall include a Participant's period of continuous employment with a prior non-governmental employer where the Participant's employment with that prior employer is terminated due to the transfer of the Participant's position and employment to the Employer.

(h) Any Knox County Schools employee who renders a school year of service but who is paid other than on a twelve-month basis is entitled to one full Year of Service.

1.19 "Dependent Child" shall mean a Participant's Child under the age of twenty-six (26). "Dependent Child" also includes a Child who qualifies as a dependent for income tax purposes and suffers a physical or mental disability.

1.20 "Determination Year" shall mean the calendar year for which the Plan is being tested.

1.21 "Differential Wage Pay" shall mean any payments as defined by Code § 3401(h)(2), made by the Employer to a Participant while on Qualified Military Service that represents an amount that, when added to the Participant's Military Pay, approximates the Compensation that was paid to the Participant while working for the Employer.

1.22 "Disability Benefit" shall mean the benefit from this Plan (including those provisions covered by the Ordinance) to which a Participant is entitled commencing at the Disability Date.

1.23 "Disability Benefit Payment Commencement Date" shall mean the first day of the calendar month set by the Board for the commencement of payment of the Disability Benefit. The Disability Benefit Payment Commencement Date shall not be earlier than the first day of the month on or after the end of a Participant's Elimination Period.

1.24 "Disability Date" shall mean, for each Participant, the earliest date the Participant is Disabled, as supported by a written statement from a United States licensed medical doctor. The Board's determination of a Participant's Disability Date shall be final.

1.25 "Disabled" or **Disability"** shall mean any medically determinable physical or mental impairment that first occurred after an Employee's most recent Employment Date or Reemployment Date and that has rendered:

(a) A Participant (non-Officer) permanently incapable of engaging in any substantial gainful employment commensurate with his or her education, experience, training, previous earnings, and utilization of vocational capacities, regardless of whether a specific job vacancy exists or whether he or she would be hired if he or she applied for work.

(b) A Participant (Officer) permanently unable to perform the duties of the Participant's job as an Officer.

(c) In either case, Disability shall not include any physical or mental condition which results directly from:

(1) Injury intentionally self-inflicted.

(2) Injury or disease for which military services or Veteran's Administration have paid retirement benefits.

(3) Injury or disease suffered or contracted prior to the date the Participant was last hired as an Employee.

(4) Injury sustained during the commission of a criminal act resulting in a conviction and punishable by confinement for a term of more than one year or infliction of the death penalty.

(d) Disability determinations shall be applied uniformly to similarly-situated Participants (Officers) and uniformly to similarly-situated Participants (non-Officers).

(e) To the extent applicable, the provisions of TCA § 7-51-201 shall apply in determining Disability of a Participant.

1.26 Reserved.

1.27 "Earnings While Disabled" shall mean earnings received by a Disabled Participant, after the Elimination Period, during Disability from full time or part-time employment, or self-employment.

1.28 "Effective Date" shall mean January 1, 2014, with respect to the original establishment of the Plan.

1.29 "Eligible Class" shall mean those Employees designated by the Employer as regularly scheduled to work at least 18-½ hours per week, being Employees whose employment is status coded by the Employer as A-1 or A-2 (or the equivalent). Employees designated by the Employer as temporary, seasonal, casual or the equivalent, or designated by the Employer as regularly scheduled to work less than 18-1/2 hours per week, being Employees whose employment is status coded by the Employer as A-3 (or the equivalent), are not in the Eligible Class regardless of the number of hours actually worked. Employees who are assigned by the Knox County School System to the job types of substitute or timecard (or the equivalent) are not in the Eligible Class regardless of the number of hours actually worked. The Employer's designation of status codes may take account of particular conditions of employment (e.g., the Knox County School System schedule). Notwithstanding the foregoing, the following Employees are excluded from the Eligible Class:

(a) Any certificated person who is employed by Knox County who is participating in and covered by the provisions of Plans A or B of Article XIII of the Charter of the City of Knoxville, Tennessee as of June 28, 1991;

(b) Any Employee who is participating in the Tennessee Consolidated Retirement System presently or by election to transfer. Provided, however, any Employee who is participating in the Tennessee Consolidated Retirement System presently or by election to transfer shall not be precluded from participation with respect to Compensation received from the Employer, pursuant to the definition of Compensation under Section 1.13;

(c) Any individual receiving a benefit under Article IV of the System;

(d) Any individual receiving a disability benefit under UOPP;

(e) For reemployment occurring on or after July 1, 2015, and on or before June 30, 2020, a reemployed UOPP Retiree; or

(f) Any Knox County Schools Employee hired or rehired on or after July 1, 2022. For avoidance of doubt, Knox County School Board members are classified as elected officials and are members of the Eligible Class. Furthermore, a general government Employee who transfers to or takes an assignment at Knox County Schools is considered to have been hired or rehired in accordance with this provision.

An Employee who is in the Eligible Class for purposes of UOPP, STAR, Closed DB or Asset Plan shall be in the Eligible Class for purposes of this Plan. An individual who is not in the Eligible Class for purposes of UOPP, STAR, Closed DB or Asset Plan shall be in the Ineligible Class for purposes of this Plan.

An Employee in the Eligible Class who transfers to other Employment not in the Eligible Class shall be in the Ineligible Class on the date of such transfer. An Employee in the Eligible Class who holds other Employment not in the Eligible Class shall not be deemed to be an Employee in the Eligible Class for purposes of this Plan with respect to service or Compensation credited or earned in that other Employment.

1.30 "Elimination Period" shall mean the period beginning on the Disability Date and continuing through the date on which the Participant receives his or her final paycheck from the Employer, including any compensation for services performed and any Employer-provided sick pay, annual or vacation pay, paid time off, or other salary continuation benefits. ~~the first ninety (90) calendar days starting on the first day after the Disability Date, or if longer the period necessary for a Participant to exhaust Participant's Employer-provided sick, annual or vacation pay, paid time off, and other salary continuation benefits of whatever kind (other than benefits provided by this Plan), and including any days the Participant returns to work between the Disability Date and the Disability Benefit Payment Commencement Date.~~

1.31 "Employee" shall mean any person who is regularly employed by the Employer, (a) including any such person who is a popularly elected or appointed official of Knox County, or who is regularly employed or appointed by such an elected or appointed official or by an elected board of Knox County, and (b) including any such person who is regularly employed or appointed by the Metropolitan Planning Commission of Knoxville-Knox County, the Public Building Authority of Knoxville-Knox County, the Knox County Retirement and Pension Board, or the Geographic Information System, but (c) excluding any Leased Employee and any person who is engaged as an independent contractor. A person employed by an entity that is treated under Code §§ 414(b), (c), (m) or (o) as a single employer with Knox County shall be treated as an Employee for purposes of this Plan only after arrangements satisfactory to the Board are made for suitable funding of the Plan by that entity. A person receiving Differential Wage Pay is treated as an Employee. A person classified by the Employer as an independent contractor who is subsequently determined by any other agency or by a court of law to be a common law employee shall not be considered an Employee for purposes of this Plan. In all cases of doubt, the Board shall determine whether a person is an Employee as defined herein.

1.32 "Employer" or **"Knox County"** shall mean the government of Knox County, Tennessee. The Employer is a political subdivision of the State of Tennessee.

1.33 "Employer Contribution" shall mean the amount determined annually by the Board based on the report of the Actuary and recommended to the Commission for funding approval.

1.34 "Employment" shall mean common law employment as an Employee of the Employer. Service as an elected or appointed public official of Knox County is treated as Employment.

1.35 "Employment Date" shall mean the date as of which an Employee is credited with the first Hour of Service upon initial Employment, as shown by the records of the Employer.

1.36 "Fiduciary" means any person who (a) exercises any discretionary authority or discretionary control respecting management of the Plan or exercises any authority or control respecting management or disposition of its assets, (b) renders investment advice for a fee or other compensation, direct or indirect, with respect to any monies or other property of the Plan or has any authority or responsibility to do so, or (c) has any discretionary authority or discretionary responsibility in the administration of the Plan.

1.37 "Fiscal Year" shall mean the fiscal year applicable from time to time to Knox County.

1.38 "Five Percent Owner" shall mean any person who owns (or is considered as owning within the meaning of Code § 318) more than five percent (5%) of the outstanding stock of the Employer or stock possessing more than five percent (5%) of the total combined voting power of all stock of the Employer or, in the case of an unincorporated business, any person who owns more than five percent (5%) of the capital or profits interest in the Employer. In determining percentage ownership hereunder, employers that would otherwise be aggregated under Code §§ 414(b), (c), (m) and (o) shall be treated as separate employers. Since Knox County is a government, there should be no Five Percent Owners.

1.39 "Former Participant" shall mean a person who has been a Participant, but who has ceased to be a Participant for any reason.

1.40 "415 Compensation" means, with respect to any Participant, such Participant's wages as defined in Code § 3401(a) and all other payments of Compensation by the Employer (in the course of the Employer's trade or business) for a Limitation Year for which the Employer is required to furnish the Participant a written statement under Code §§ 6041(d), 6051(a)(3) and 6052.

(a) 415 Compensation must be determined without regard to any rules under Code § 3401(a) that limit the remuneration included in wages based on the nature or location of the employment or the services performed (such as the exception for agricultural labor in Code § 3401(a)(2)).

(b) 415 Compensation shall include only those items specified in Regulation § 1.415-2(d)(i) and exclude those specified in Regulation § 1.415-2(d)(2).

(c) Notwithstanding the above, the determination of Compensation shall be made by:

(1) Including any elective deferral (as defined in Code § 402(g)(3)), and any amount which is contributed by the Employer at the election of the Participant pursuant to a salary reduction agreement and which is not includible in the gross income of the Participant by reason of Code §§ 125, 132(f)(4), 402(e)(3), 402(h)(1)(B), 403(b) or 457(b), and Employee Contributions described in Code § 414(h)(2) that are treated as Employer contributions. Amounts not includible in gross income under Code § 125 shall be deemed to include any amounts not available to a Participant in cash in lieu of group health coverage because the Participant is unable to certify that the Participant has other health coverage, provided the Employer does not request or collect information regarding the Participant's other health coverage as part of the enrollment process for the health plan.

(2) Including Post-Severance Compensation.

(d) 415 Compensation includes Compensation paid to a Participant who is Disabled.

(e) 415 Compensation for a Limitation Year shall not include amounts earned but not paid during the Limitation Year solely because of the timing of pay periods and pay dates.

(f) 415 Compensation shall include amounts that are includible in the gross income of a Participant under the rules of Code §§ 409A or 457(f)(1)(A) or because the amounts are constructively received by the Participant.

(g) A Differential Wage Payment is treated as 415 Compensation.

(h) With respect to a Participant who is Disabled and who is permanently and totally disabled within the meaning of Code § 22(e)(3), 415 Compensation shall mean the 415 Compensation the Participant would have received for the Limitation Year if the Participant was paid at the rate of 415 Compensation paid immediately before becoming Disabled.

1.41 "Gross Disability Benefit" shall mean a monthly amount equal to 60% of a Participant's Pre-Disability Compensation.

1.42 "Highly Compensated Employee" shall mean an Employee described in Code § 414(q) and the Regulations thereunder and generally means any Employee who:

(a) Was a Five Percent Owner at any time during the Determination Year or the Look-back Year; or

(b) For the Look-back Year had 415 Compensation from the Employer in excess of $80,000. The $80,000 amount is adjusted at the same time and in the same manner as under Code § 415(d), except that the base period is the calendar quarter ending September 30, 1996.

In determining who is a Highly Compensated Employee, Employees who are nonresident aliens and who received no earned income (within the meaning of Code § 911(d)(2)) from the Employer constituting United States source income within the meaning of Code § 861(a)(3) shall not be treated as Employees. If an Employee who is a nonresident alien has U.S. source income, that Employee is treated as satisfying this definition if all of such Employee's U.S. source income from the Employer is exempt from U.S. income tax under an applicable income tax treaty. Additionally, all affiliated employers shall be taken into account as a single employer and Leased Employees within the meaning of Code §§ 414(n)(2) and 414(o)(2) shall be considered Employees unless such Leased Employees are covered by a plan described in Code § 414(n)(5) and are not covered in any qualified plan maintained by the Employer. The exclusion of Leased Employees for this purpose shall be applied on a uniform and consistent basis for all of the Employer's retirement plans. Highly Compensated Former Employees shall be treated as Highly Compensated Employees without regard to whether they performed services during the Determination Year.

1.43 "Hour of Service" shall mean the following:

(a) Each hour for which an Employee is paid or entitled to payment of Compensation for the performance of duties for the Employer during applicable computation period.

(b) Each hour for which an Employee is paid or entitled to payment of Compensation by the Employer on account of a period of time during which no duties are performed (irrespective of Severance) due to vacation, holiday, illness, incapacity (including disability), jury duty, military duty or Leave of Absence; provided, however, that, with respect to this Section 1.43(b):

(1) Hours for which an Employee is directly or indirectly paid, or entitled to payment, on account of a period during which no duties are performed shall not be credited if such payment is made or due under a plan maintained solely for the purpose of complying with applicable workers' compensation, unemployment compensation or disability insurance laws, and

(2) Hours shall not be credited for a payment which solely reimburses an Employee for medical or medically-related expenses incurred by the Employee.

For purposes of this Section 1.43(b), a payment shall be deemed to be made by or due from the Employer regardless of whether such payment is made by or due from the Employer directly, or indirectly through, among others, a trust fund, or insurer, to which the Employer contributes or pays premiums and regardless of whether contributions made or due to the trust fund, insurer or other entity are for the benefit of particular Employees or are on behalf of a group of Employees in the aggregate.

(c) Each hour for which back pay, irrespective of mitigation of damages, is either awarded or agreed to by the Employer. The same hours shall not be credited both under Section 1.43(a) or (b) and under this Section. Hours credited for back pay under this Section 1.43(c) with respect to periods described in Section 1.43(b) shall be subject to the limitations set forth in such Section 1.43(b).

(d) Each hour for which a Disabled Participant is paid or entitled to a disability benefit under the Disability Plan during the applicable computation period.

(e) The provisions of paragraphs (b) and (c) of 29 CFR 2530.200b-2 shall be observed in crediting Hours of Service under this Section 1.43, which paragraphs are incorporated herein by reference.

1.44 "In Line of Duty" shall mean, in connection with a Disability or death, resulting, directly or indirectly, from an act occurring or a thing done or a risk taken which, as determined in the discretion of the Board, was required of the Participant in the performance of his or her duty as an Employee. Where applicable, the provisions of TCA § 7-51-201 shall apply in determining whether a Participant's Disability or death occurred In the Line of Duty under this Plan.

1.45 "Inactive Participant" shall mean a Participant (including a former Participant who has a balance remaining in his or her Individual Account) who is not classified as an Active Participant with respect to a Plan Year.

1.46 "Ineligible Class" shall mean those Employees who are not in the Eligible Class.

1.47 "Investment Manager" means an entity that (a) has the power to manage, acquire, or dispose of Plan assets and (b) acknowledges Fiduciary responsibility to the Plan in writing. Such entity must be a person, firm, or corporation registered as an investment adviser under the Investment Advisers Act of 1940, a bank, or an insurance company.

1.48 "Leased Employee" means any person (other than an Employee of the recipient) who pursuant to an agreement between the recipient and any other person ("leasing organization") has performed services for the recipient (or for the recipient and related persons determined in accordance with Code § 414(n)(6)) on a substantially full time basis for a period of at least one year, and such services are performed under primary direction or control by the recipient. Contributions or benefits provided a Leased Employee by the leasing organization which are attributable to services performed for the recipient employer shall be treated as provided by the recipient. A Leased Employee shall not be eligible to participate in this Plan.

1.49 "Leave of Absence" shall mean that period during which the Participant is absent without compensation and for which the Employer, in its sole discretion, has determined the Participant to be on a leave of absence rather than having Severed Employment. Such discretion of the Employer shall be exercised in a uniform and nondiscriminatory manner.

1.49A "Limitation Year" shall mean the calendar year.

1.50 "Look-back Year" means the twelve (12) month period immediately preceding the Determination Year.

1.51 "Medical Expense Retirement Plan" or **"MERP"** shall mean the Knox County Medical Expense Retirement Plan established pursuant to Article VII of the System, one of the component plans of the System.

1.52 "Month of Service" shall mean a calendar month during which an Employee has been credited with one (1) or more Hours of Service.

(a) If a period of military service incurred prior to the Participant's Employment is not otherwise included in Months of Service, at the Participant's election filed with the Board upon completion of five (5) Years of Service, the Participant shall be granted a Month of Service for each calendar month in which the Participant performed any such military service, not in excess of three (3) years. However, such military service shall not count as Months of Service if the Participant received, is receiving, or is entitled to receive, retirement or pension benefits attributable to such service from any other retirement system, other than UOPP, STAR, Closed DB, Asset Plan, MERP or 457 Plan.

(b) In the case of an Employee or a Participant who leaves Employment by reason of Qualified Military Service and who returns to Employment on or before the expiration of ninety (90) days after the date on which he or she is entitled to be released from active duty (or on or

before such date as the law may specify as to reemployment), such Employment, to the extent required by law, shall be treated as Months of Service despite such absence.

(c) Months of Service shall include all Months of Service then credited under either STAR or the Asset Plan, or both, regardless of whether such Months of Service are consecutive, for a Participant (i) who transfers to the Eligible Class without a break in service, or (ii) who is reemployed in the Eligible Class without having withdrawn the Participant's entire Vested Individual Account under STAR or the Asset Plan, as the case may be. Months of Service for a Participant who is reemployed in the Eligible Class having withdrawn the Participant's entire Vested Individual Account under either STAR or the Asset Plan, or both, shall not include Months of Service previously credited under STAR or the Asset Plan, as the case may be.

(d) Months of Service shall include all Months of Service then credited under either UOPP or the Closed DB, or both, regardless of whether such Months of Service are consecutive, for a Participant (i) who transfers to the Eligible Class without a break in service, or (ii) who is reemployed in the Eligible Class without having taken a refund and without having withdrawn the Participant's entire Vested benefit under either UOPP or the Closed DB, or both. Months of Service for a Participant who is reemployed in the Eligible Class having taken a refund or having withdrawn the Participant's entire Vested benefit under both UOPP or the Closed DB, or both, shall not include Months of Service previously credited under UOPP or the Closed DB, as the case may be.

(e) A Participant's Months of Service shall not include any Service credited under the Teacher's Plan.

(f) An Employee who is reemployed pursuant to Section 3.02(c) shall not be credited with Months of Service.

(g) An Employee who is receiving payments from UOPP, STAR or any Other Plan of the System and who is reemployed pursuant to Section 3.02(b) shall be credited with Months of Service.

(h) Notwithstanding any other term, the same calendar month shall not be counted more than once as a Month of Service.

1.53 "Net Disability Benefit" shall mean the amount in any month of a Disabled Participant's Gross Disability Benefit, determined by the Board in accordance with its procedures, (a) offset by his or her Social Security benefit as provided in Section 5.07, (b) offset by workers' compensation benefits as provided in Section 5.07, and (c) adjusted by Participant's Earnings While Disabled pursuant to Section 5.08.

1.54 "Officer" means a sworn officer regularly employed by the Knox County Sheriff's Office. The Knox County Sheriff and Chief Deputy Sheriff, and individuals in positions designated as "law enforcement" or "corrections" by the Knox County Merit System are Officers. Reserve officers, officers who are not scheduled to work at least 18-1/2 hours per week, officers who hold part-time positions designated as such by the Sheriff's Office even if

they are scheduled to work more than 18-1/2 hours per week, civilian Employees of the Sheriff's Office, and Employees who are not designated by the Employer as eligible for benefits, are not Officers within the meaning of this Plan. Individuals employed in positions designated as "civilian" by the Merit System are not Officers. In all cases of doubt, the Board shall determine whether a person is an Officer as defined herein.

1.55 "Ordinance" shall mean Ordinance O-13-8-101 enacted by the Commission effective January 1, 2014, as amended from time to time, and establishing the In Line of Duty Disability Benefit.

1.56 "Other Plan of the System" shall refer to any one or more of the Asset Plan, Closed DB, MERP, Teacher's Plan, 457 Plan or Disability Plan.

1.57 "Participant" shall mean any Employee in the Eligible Class who becomes a Participant in the Plan and has not for any reason become ineligible to participate further in the Plan.

1.58 "Participant (non-Officer)" shall mean a Participant who is not an Officer on the Disability Date.

1.59 "Participant (Officer)" shall mean a Participant who is an Officer on the Disability Date.

1.60 "Plan" shall mean the Knox County Employee Disability Benefit Plan as set forth in this instrument, the Trust Agreement attached hereto as Exhibit B and the Trust established under that Agreement, including any amendments to the foregoing, being a component plan of the System. This Plan is intended to be part of a voluntary employee benefits association.

1.61 "Plan Year" shall mean the twelve (12) month period ending on each June 30. Provided, however, the period from January 1, 2014 to June 31, 2014 shall be a short Plan Year.

1.62 "Post-Severance Compensation" means payments made within 2-1/2 months after Severance if they are payments that, absent Severance, would have been paid to the Employee while the Employee continued in Employment and would have been Compensation for services as an Employee (or for purposes of determining 415 Compensation, would have been 415 Compensation for services as an Employee). Any payments not described above are not considered Compensation or 415 Compensation if paid after Severance, even if paid within 2-1/2 months following Severance, except for payments to an individual who does not currently perform services for the Employer by reason of Qualified Military Service to the extent these payments do not exceed the amounts the individual would have received if the individual had continued to perform services for the Employer rather than entering Qualified Military Service.

(a) Post-Severance Compensation shall include regular pay after Severance if:

(1) The payment is regular Compensation for services during the Participant's regular working hours, or Compensation for services outside the Participant's regular

working hours (such as overtime or shift differential), commissions, bonuses, or other similar payments; and

(2) The payment would have been paid to the Participant prior to Severance if the Participant had continued in Employment with the Employer.

(b) Leave cashouts shall be included in Post-Severance Compensation, if those amounts would have been included in the definition of Compensation if they were paid prior to the Participant's Severance, and the amounts are payment for unused accrued bona fide sick, vacation, or other leave, but only if the Participant would have been able to use the leave if Employment had continued.

(c) Deferred compensation shall be included in Post-Severance Compensation, if the deferred compensation would have been included in the definition of Compensation if it had been paid prior to the Participant's Severance, and the deferred compensation is received pursuant to a nonqualified unfunded deferred compensation plan, but only if the payment would have been paid at the same time if the Participant had continued in Employment with the Employer and only to the extent that the payment is includible in the Participant's gross income.

(d) Post-Severance Compensation includes payments to an individual who does not currently perform services for the Employer by reason of Qualified Military Service to the extent those payments do not exceed the amounts the individual would have received if the individual had continued to perform services for the Employer rather than entering Qualified Military Service.

1.63 "Pre-Disability Compensation" shall mean the arithmetic average of a Participant's monthly Compensation determined for twelve (12) consecutive Months of Service in which his or her Compensation was highest, or determined for such lesser number of Months of Service actually completed.

1.64 "Qualified Military Service" shall have the meaning given that term by Code § 414(u)(1) with respect to such service attributable to the Employer.

1.64A "Recurrent Disability" shall mean a subsequent Disability which is related to, or due to the same cause(s) of, a prior Disability for which a Disability Benefit was payable.

1.65 "Reemployment Date" shall mean the date as of which an Employee is credited with the first Hour of Service upon a resumption of Employment after Severance.

1.66 "Regulation" shall mean the Income Tax Regulations as promulgated by the Secretary of the Treasury or delegate, as amended from time to time.

1.66A "Retiree" shall mean a Participant who has had a Severance and who is eligible to receive and has applied to the Board and been approved by the Board to receive Retirement benefits under a component plan of the System, STAR or UOPP.

1.67 "Retirement" shall mean any of the forms of retirement set forth in Article VI except pursuant to Section 6.06.

1.68 "Severance" or **"Severs"** shall mean, with respect to any individual, the voluntary or involuntary cessation from being an Employee of the Employer within the meaning of Code § 401(k)(2)(B)(i)(I). Leave of Absence shall not be deemed to be a Severance. An individual does not have a Severance if, in connection with a change or transfer of employment or assignment, the individual continues as an Employee in the Employment of the Employer. Severance may occur on termination of Employment, including without limitation on death, Disability or retirement.

1.69 "Severance Date" shall mean the date a Participant's Severance occurs.

1.70 "Social Security Normal Retirement Age" shall mean for a Participant the age at which the Participant is entitled to full Social Security Retirement benefits, without reduction due to age.

(a) In the case of a Participant who is not eligible for Social Security Retirement benefits (or who is not eligible for full Social Security Retirement benefits) for any reason, Social Security Normal Retirement Age shall be for that Participant the age at which an individual born on the same date as the Participant, and who met all conditions for the benefit, would be entitled to full Social Security Retirement benefits, without reduction for age.

(b) A Participant's Social Security Normal Retirement Age is not affected by the Participant's decision to actually commence to receive a Social Security Retirement benefit earlier or later than the age at which the Participant is entitled to full Social Security Retirement benefits.

(c) Notwithstanding the foregoing provisions of this Section 1.70, the Social Security Normal Retirement Age for a Participant whose Disability Date occurs less than five (5) years prior to his or her Social Security Normal Retirement Date (as determined without regard to this Section 1.70(c)) shall be equal to the Participant's age as of the Disability Date plus five (5) years.

1.71 "Spouse" shall mean the individual to whom a Participant is lawfully married.

1.72 "STAR" shall mean the Knox County Sheriff's Total Accumulation Retirement Plan established and maintained pursuant to Charter § 7.05 and referred to in the Charter as the "2014 Officers Plan".

1.73 "System" shall mean the Knox County Employee Benefit System created and established as of July 1, 1968, and amended from time to time. As used herein, the System does not include STAR or the Uniformed Officers Pension Plan.

1.74 "Teacher's Plan" shall mean the Knox County Teacher's Plan, a component plan of the System.

1.74A "Temporary Layoff" shall mean an involuntary cessation of active service as an Employee for a period of time that has been specified, in writing, by the Employer and agreed to by the Participant in advance. A Temporary Layoff does not include a disciplinary suspension, military leave, Leave of Absence, or leave permitted by the Family and Medical Leave Act.

1.75 "Trustee" shall the mean the person(s) or entity named by the Board as Trustee under the Trust Agreement.

1.76 "Trust Agreement" shall the mean the provisions of any separate Trust Agreement executed by the Board on behalf of the Plan and by any third party named by the Board as Trustee.

1.77 "Trust Fund" shall the mean the assets of the Plan and Trust as the same shall exist from time to time.

1.78 "Trust Fund Earnings" shall mean (a) the fair market value of the Trust Fund on the current Valuation Date minus (b) the fair market value of the Trust Fund on the Valuation Date that immediately preceded the current Valuation Date and minus (c) all contributions paid to the Trust Fund from such preceding Valuation date through the current Valuation Date, plus (d) all benefits paid to Participants from such preceding Valuation Date through the current Valuation Date and plus (e) fees and expenses, if any, paid by the Trust Fund.

1.79 "Uniformed Officers Pension Plan" or **"UOPP"** shall mean the separate plan of the System established and maintained pursuant to Charter § 7.05 and referred to in the Charter as the "2007 Officers Plan".

1.80 "USERRA" shall mean the Uniformed Services Employment and Reemployment Rights Act of 1994.

1.81 "Vest" or **"Vested"** shall mean nonforfeitable, except as provided under Section 7.02 or the Charter.

1.82 "Year of Service" shall mean the sum of an Employee's whole years employed by the Employer where each such year is determined as twelve (12) aggregated Months of Service, regardless of whether such months are consecutive.

ARTICLE II - ADMINISTRATION

2.01 Knox County Retirement and Pension Board

The Board established pursuant to the Charter shall have complete control of the administration of the Plan subject to the provisions of the Charter and this Plan, with all powers necessary to enable it to properly carry out its duties in that respect.

2.02 Powers and Responsibilities of the Board

(a) In addition to the general powers and responsibilities otherwise provided for in this Plan, the Board shall be empowered to appoint and remove the Trustee and/or any other retained individual or organization from time to time as it deems necessary for the proper administration of the Plan to ensure that the Plan is being operated for the exclusive benefit of the Participants and their Beneficiaries in accordance with the terms of the Plan, the Charter, the Code and applicable Tennessee law. The Board may appoint counsel, specialists, advisers, agents (including any nonfiduciary agent) and other persons as the Board deems necessary or desirable in connection with the exercise of its Fiduciary duties under this Plan. The Board may compensate such agents or advisers from the assets of the Plan as Fiduciary expenses (but not including any business (settlor) expenses of the Board), to the extent not paid by the Employer.

(b) The Board may, by written agreement or designation, appoint at its option an Investment Manager, investment adviser, or other agent to provide direction to the Trustee with respect to any or all of the Plan assets. Such appointment shall be given by the Board in writing in a form acceptable to the Trustee and shall specifically identify the Plan assets with respect to which the Investment Manager or other agent shall have authority to direct the investment.

(c) The Board shall establish a "funding policy and method," i.e., it shall determine whether the Plan has a short-run need for liquidity (e.g., to pay benefits) or whether liquidity is a long run goal and investment growth (and stability of same) is a more current need, or shall appoint a qualified person to do so. The Board or its delegate shall communicate such needs and goals to the Trustee, who shall coordinate such Plan needs with its investment policy. The communication of such a "funding policy and method" shall not, however, constitute a directive to the Trustee as to the investment of the Trust Fund. Such "funding policy and method" shall be consistent with the objectives of this Plan.

(d) The Board shall periodically review the performance of any Fiduciary or other person to whom duties have been delegated or allocated by it under the provisions of this Plan or pursuant to procedures established hereunder. This requirement may be satisfied by formal periodic review by the Board or by a qualified person specifically designated by the Board, through day-to-day conduct and evaluation, or through other appropriate ways.

2.03 Designation of Administrative Authority

The Board is the Plan Administrator. The Board may appoint any person, including, but not limited to, Employees, to perform designated ministerial duties or tasks. Any person so

appointed shall signify acceptance by written instrument filed with the Board. Upon the resignation or removal of any individual performing the duties of Administrator, the Board may designate a successor. The individual performing such designated ministerial duties and tasks shall have no power administratively to add to, subtract from or modify any of the terms of the Plan, or to change, add to, or subtract from any benefits provided by the Plan, or to waive or fail to apply any requirements for eligibility for participation or for benefits under the Plan. Any and all such powers rest solely with the Board.

2.04 Powers and Duties of the Board

The primary responsibility of the Board is to administer the Plan for the exclusive benefit of the Participants and Beneficiaries, subject to the specific terms of the Plan. The Board shall administer the Plan in accordance with its terms and shall have the power and discretion to construe the terms of the Plan and to determine all questions arising in connection with the administration, interpretation, and application of the Plan, including all questions relating to the eligibility of Employees to participate in the Plan or be covered by any benefit provided by the Plan, and the amount of any benefit to which any Participant or Beneficiary may become entitled hereunder. Any such determination by the Board shall be conclusive and binding upon all persons, including the Trustee, and all decisions of the Board as to the facts of any case and the meaning, intent, or proper construction of any provision of the Plan, or as to any rule or regulation in its application to any case shall be final and conclusive. The Board may establish procedures, correct any defect, supply any information, or reconcile any inconsistency in such manner and to such extent as shall be deemed necessary or advisable to carry out the purpose of the Plan; provided, however, that any procedure, discretionary act, interpretation or construction shall be done in a nondiscriminatory manner based upon uniform principles consistently applied and shall be consistent with the intent that the Plan shall continue to be deemed tax exempt under the terms of Code § 501(c)(9), and shall comply with all Regulations issued pursuant thereto. The Board shall have all powers necessary or appropriate to accomplish its duties under the Plan.

The Board shall be charged with the duties of the general administration of the Plan as set forth under the terms of the Plan, including, but not limited to, the following:

(a) The discretion to determine all questions relating to the eligibility of any Employee to participate or remain a Participant hereunder and to receive benefits under the Plan;

(b) The establishment of uniform rules and procedures to be followed by Participants and Beneficiaries in filing applications for benefits, in furnishing and verifying proofs necessary to determine age, Spouse and Children, and in all other matters required to administer the Plan;

(c) To receive all applications for benefits and determine all facts necessary to establish the right of the applicant to benefits and the amount thereof under the provisions of the Plan, including the receipt, maintenance and distribution of Participant and Beneficiary notices, consents, elections and applications through the use of electronic media, with consent of the Participant or Beneficiary, in accordance with Regulation § 1.401(a)-21;

(d) To prepare and distribute information concerning the Plan to Participants at the expense of the Fund, in such manner as the Board shall deem appropriate;

(e) To compute, certify, and direct the Trustee with respect to the amount and the kind of benefits to which any Participant shall be entitled hereunder;

(f) To authorize and direct the Trustee with respect to all non-discretionary or otherwise directed disbursements from the Trust;

(g) To maintain all necessary records for the administration of the Plan;

(h) To interpret the provisions of the Plan and to make and publish such rules for regulation of the Plan as are consistent with the terms hereof;

(i) To determine the size and type of any Contract to be purchased from any insurer, and to designate the insurer from which such Contract shall be purchased;

(j) To compute and certify to the Employer and to the Trustee from time to time the sums of money necessary or desirable to be contributed to the Plan;

(k) To consult with the Employer and the Trustee regarding the short- and long-term liquidity needs of the Plan in order that the Trustee can exercise any investment discretion in a manner designed to accomplish specific objectives;

(l) To receive and review reports of the financial condition and of the receipts and disbursements of the Fund from the Trustee;

(m) To assist any Participant regarding the Participant's rights, benefits, or elections available under the Plan;

(n) To establish reasonable procedures for responding to Domestic Relations Order received by the Board;

(o) To establish reasonable procedures for coordinating and avoiding the duplication of benefits among this Plan, UOPP, STAR, and Other Plans of the System; and

(p) To establish rules and procedures and exercise discretion thereunder, uniformly applied to similarly situated individuals, without discrimination in favor of Highly Compensated Employees, to remove or impose conditions, extend limits, provide alternate benefits, fund accommodations, and otherwise make adjustments to Disability Benefits of particular Participants, on the recommendation of the Board's independent professional claims adjudicator or work incentive program manager, to adapt individual Plan benefits to meet the goal of incentivizing return to work.

2.05 Records and Reports

The Board shall keep a record of all actions taken and shall keep all other books of account, records, policies, and other data that may be necessary for proper administration of the Plan and shall be responsible for supplying all information and reports to the Internal Revenue Service, the State of Tennessee, Participants, Beneficiaries and others as required by law. Records shall be maintained indicating the amount contributed by the Employer, and the amount and type of benefits paid to or on behalf of each Participant. Copies of the Plan shall be preserved in the custody of the Board. Copies of the Plan documents, forms, and other records shall be made available for examination by any interested person. Copies may be obtained at all reasonable times and at a reasonable cost.

2.06 Appointment of Advisers

The Board, or the Trustee with the written consent of the Board, may appoint counsel, specialists, advisers, agents (including nonfiduciary agents) and other persons as the Board or the Trustee deems necessary or desirable in connection with the administration of this Plan, including but not limited to agents and advisers to assist with the administration and management of the Plan, and thereby to provide, among such other duties as the Board may appoint, assistance with maintaining Plan records and the providing of investment information to the Plan's investment Fiduciaries.

The Board shall be entitled to rely on all certificates and reports furnished by a consultant or Actuary appointed by the Board and upon all opinions given by any legal counsel selected by the Board and any advice of a qualified investment consultant. The Board and its members shall be fully protected in respect of any action taken or suffered by them in good faith reliance upon the advice or opinion of any such consultant, Actuary or legal counsel, and all action so taken or suffered shall be conclusive upon each of them and upon all Participants, Beneficiaries or other persons interested in the Plan.

2.07 Information from Employer

The Employer shall supply full and timely information to the Board on all pertinent facts as the Board may require to perform its function hereunder and the Board shall advise the Trustee of such of the foregoing facts as may be pertinent to the Trustee's duties under the Plan. The Board may rely upon such information as is supplied by the Employer and shall have no duty or responsibility to verify such information.

2.08 Actuarial Impact Statement

Any amendment to the Plan that shall have the effect of increasing benefits shall be contingent upon the issuance of an actuarial impact statement from the Actuary to the Board identifying the actuarial impacts, or stating that such an increase shall not have an adverse actuarial impact on the Plan.

2.09 Payment of Expenses

All expenses incurred by or on behalf of the Board in the administration of the Plan during each Fiscal Year shall be paid out of the Trust Fund unless paid by other means, at the discretion of the Board. The Board is authorized to allocate expenses of the System to and among the Plan, UOPP and Other Plans of the System, using such methods and estimates as the Board determines appropriate. Such expenses shall include any expenses incident to the functioning of the Board, or any person or persons retained or appointed by any named Fiduciary incident to the exercise of their duties under the Plan, including, but not limited to, fees of accountants, Actuary, counsel, Investment Managers, and other specialists and their agents, and other costs of administering the Plan. Until paid, the expenses shall constitute a liability of the Trust Fund.

2.10 Prohibited Personal Interests

(a) No member of the Board shall participate, directly or indirectly, in the gains or profits of any investment of the Fund, except to the extent any member of the Board may be a Participant or Beneficiary. No member of the Board shall participate, directly or indirectly, in commissions or compensation in any form from any insurance company or hospital service association that underwrites any of the benefits provided by the Plan, except to the extent any member of the Board may be a Participant or a Beneficiary. No member of the Board shall use, directly or indirectly, for himself or herself or as an agent in any manner the funds or deposits of the Plan, except to make such payments therefrom as are authorized by the Board, nor shall any member of the Board become an endorser or surety of any type, or an obligor for monies loaned by or borrowed from the Plan.

(b) No part of the net earnings of the Plan may inure to the benefit of any private shareholder or individual other than through the payment of benefits permitted by Treas. Reg. § 1.501(c)(9)-3.

2.11 Claims Procedure

If the Board shall determine that eligibility or benefits applied for by any person shall be denied, either in whole or in part, the following provisions shall govern:

(a) **Notice of Denial.** Upon its denial of a claim for eligibility or benefits under the Plan, the Board shall provide the claimant with written notice of such denial setting forth: (1) the specific reason or reasons for the denial; (2) specific reference to pertinent provisions of the Plan upon which the denial is based; and (3) the claimant's right to seek review under this Section 2.11. A claimant must follow the procedure set out in this Section 2.11 prior to seeking judicial review.

(b) **Claims Review.** Every claimant with respect to whom a claim is denied shall, upon written notice from the Board of such denial, have the right to: (1) request, within sixty (60) days of the date of such notice from the Board, a review of the denial of eligibility or benefits by delivering written notice to the Board; and (2) submit issues and comments in writing.

(c) **Decision on Review.** The Board shall, upon receipt of a request for review submitted by the claimant, conduct such review and provide the claimant with written notice of the decision reached by the Board.

(1) Medical information provided by a claimant in support of a claim for a Disability Benefit may be referred by the Board pursuant to Section 5.05 to an outside contracted evaluation service for evaluative, consultative and administrative services and for a report and recommendation to the Board. In its discretion, the Board may establish procedures for the conduct of its review, including referring the claim to a committee to conduct a hearing and to make a report and recommendation to the Board. The Board (or its committee) may conduct a hearing in writing or in person. The claimant may participate in any such hearing and may be represented by counsel, at the claimant's expense. The claimant may produce witnesses or other evidence in support of the claim. The claimant shall be entitled to access to the Plan document and to any material on the claim in the record before the Board.

(2) The Board shall provide the claimant with written notice of its decision following review. If the Board decision is to deny eligibility or benefits under the Plan in whole or in part, the Board shall provide the claimant with written notice of such denial setting forth: (i) the specific reason or reasons for the denial; (ii) specific reference to pertinent provisions of the Plan upon which the denial is based; and (iii) reference to any right the claimant may have to seek judicial review after his or her exhaustion of all administrative remedies.

(d) **Finality.** All disputes involving eligibility or benefits under the Plan shall be resolved under this Section 2.11, and the decisions of the Board shall be final.

(e) **Pending Benefits.** The Board may withhold or condition payment of benefits involved in any dispute in its discretion pending final resolution, including judicial review.

ARTICLE III - ELIGIBILITY AND PARTICIPATION

3.01 Eligibility and Entry

(a) Each individual who becomes an Employee on or after the Effective Date, who is in the Eligible Class and who is not a Leased Employee, shall be eligible to participate in the Plan and, as a condition of Employment, shall become a Participant upon the later of the Effective Date or the date of such Employment.

(b) Except as provided in Section 3.01(b)(1) or (2), each individual who is an Employee in the Eligible Class immediately prior to the Effective Date and who is not a Leased Employee, as a condition of Employment, shall participate in the Plan as of the Effective Date.

(1) A UOPP participant who suffers a disability as defined in UOPP prior to the Effective Date shall not participate in or receive any benefit under this Plan unless and until he or she recovers from that disability and returns to Employment.

(2) A Closed Defined Benefit Plan participant or an Asset Accumulation Plan participant who suffers a disability as defined in Closed Defined Benefit Plan prior to the Effective Date shall not participate in or receive any benefit under this Plan unless and until he or she recovers from that disability and returns to Employment.

(c) Notwithstanding anything in this Plan to the contrary, in no case may eligibility for membership or benefits under the Plan be determined in a manner that limits membership or benefits to officers, shareholders, or Highly Compensated Employees of the Employer. Neither the classification of Employees to which benefits are provided nor the class of benefits available to such Employees shall be determined on any basis that discriminates in favor of Highly Compensated Employees.

3.02 Reemployment

(a) An Employee who Severed Employment and who is subsequently reemployed in the Eligible Class shall become a Participant and enter the Plan on his or her Reemployment Date.

(b) Subject to Section 5.08(b), if such an Employee is receiving payments from the Plan as of his or her Reemployment Date, such payments shall cease as soon as is administratively feasible.

(c) Subject to the return to work incentives under Section 5.08(b), if an Employee who is receiving payment from the Plan becomes reemployed, but not in the Eligible Class, such payments shall cease as soon as is administratively feasible.

(d) An Employee who is receiving payments under UOPP or Closed DB shall not be reemployed in the Eligible Class or the Ineligible Class while those payments continue.

3.03 Absence for Qualified Military Service

(a) Notwithstanding any provision of the Plan to the contrary, reemployment, contributions, benefits and the computation of Credited Service with respect to Qualified Military Service that interrupts Employment will be provided in accordance with USERRA.

(b) A Participant who becomes Disabled while performing Qualified Military Service, subject to Section 1.25(c)(2), shall be entitled to any benefits provided under the Plan as if the individual had resumed Employment on the day preceding Disability and Severed Employment on the actual date of Disability.

3.04 Ineligible Class

(a) In the event an Employee in the Ineligible Class becomes a part of the Eligible Class, such Employee shall then become a Participant immediately.

(b) In the event a Participant becomes part of the Ineligible Class, he or she shall cease to participate immediately upon leaving the Eligible Class and shall again participate immediately upon return to the Eligible Class.

3.05 Temporary Layoff

A Participant subject to Temporary Layoff will continue to participate in the Plan through the end of the month in which the Temporary Layoff began.

ARTICLE IV - FINANCING OF PLAN

4.01 Payment of Contributions

The Plan shall be funded on an actuarially sound basis. The Board shall inform the Employer annually of the contribution requirements for the Plan as determined by the Board on the advice of the Actuary, and the Employer shall pay to the Trustee from time to time such amounts in cash as necessary to provide the benefits under the Plan and pay the expenses of the System determined by the application of accepted actuarial methods and assumptions. The method of funding shall be consistent with Plan objectives.

4.02 Actuarial Methods

In establishing the liabilities under the Plan and contributions thereto, the Actuary will use such actuarially sound methods and assumptions adopted by the Board on the recommendation of the Actuary as will reasonably reflect the cost of the benefits of the Plan and the expenses of the administration of the System. Plan assets shall be valued on the last day of the Plan Year (or on any other date determined by the Board) using any reasonable method of valuation determined by the Board that takes into account fair market value pursuant to Regulations. There must be an actuarial valuation of the Plan at least once every year.

4.03 Trust Fund

(a) All contributions to this Plan made by the Employer shall be deposited, held and invested in a Trust Fund, which shall constitute a voluntary employees' beneficiary association pursuant to Section 501(c)(9) of the Code, to be known as the "Knox County Employee Disability Benefit Plan Trust Fund," which shall be a trust fund exclusively for the benefit of Participants, Former Participants and Beneficiaries, accomplished by a Trust Agreement as amended from time to time, which shall constitute part of this Plan. The Board shall be authorized and empowered to execute the Trust Agreement, and amend it from time to time.

(b) Investment of all contributions made under the Plan and all transactions of the Trust Fund shall be made in accordance with the terms of the Trust Agreement.

4.04 Participant Contributions

The Plan shall not require or accept Participant contributions.

4.05 Form and Manner of Employer Contributions

Employer contributions may be made on any date or dates the Employer elects, but the total amount of its contribution for any Plan Year shall be paid within a reasonable period of time. Although it is the intent of the Employer that its contributions hereunder shall be regular and substantial, the Employer shall be under no duty to contribute the same amount for every Plan Year.

ARTICLE V - DISABILITY BENEFITS

5.01 General Conditions

(a) An individual who is not employed by Knox County on the Disability Date shall not be eligible to receive Disability Benefits under this Plan.

(b) Disability Benefits shall be subject to all applicable requirements of the Ordinance and this Article V.

(c) Unless otherwise allowed by the Board, a Participant is required to timely apply for Social Security Disability benefits and diligently pursue that application at least through a Social Security Administration appeals hearing. Such application and prosecution shall be a condition of payment and of continued payment of Disability Benefits.

(d) As part of the application for a Disability Benefit, and as a condition of payment of Disability Benefits, a Participant shall execute and deliver to the Board in the form prescribed by the Board an undertaking to repay any amount the Participant is overpaid, including without limitation, the overpayment of a Disability Benefit due to the retroactive award of Social Security or workers' compensation benefits or due to Earnings While Disabled.

(e) No Participant shall be simultaneously entitled to a Disability Benefit under this Plan and either or both the Closed DB and UOPP.

(f) The Board may establish from time to time in its discretion procedures to be uniformly applied in the determination of eligibility for and the amounts of Disability Benefits payable, and offsets and adjustments thereto, under this Plan.

(g) A Participant shall furnish to the Board an application for Disability Benefits on a form prescribed by the Board.

(1) A Participant's Disability Benefit Payment Commencement Date shall not be established retroactive more than three (3) full calendar months prior to the date the Disability application was filed, unless the Board determines otherwise, for good cause shown.

(2) A Disability benefit shall not be paid to a Former Participant who attempts to file a Disability application more than three (3) full calendar months after his or her Severance Date.

(h) Effective on or after April 1, 2026, a Participant must be on an approved leave of absence or otherwise not actively working within two (2) weeks of submitting an application for Disability benefits and throughout the pendency of the Disability application process. An application submitted by a Participant who remains actively working beyond this period or who returns to active service at any time before a final determination is made, will not be processed or approved.

5.02 Eligibility - Disability In Line of Duty

As set out in the Ordinance, a Participant who becomes Disabled In Line of Duty shall be eligible to receive a Disability Benefit.

5.03 Eligibility - Disability Not In Line of Duty

A Participant who has completed five (5) years of Credited Service and thereafter becomes Disabled, although not In Line of Duty, shall be eligible to receive a Disability Benefit.

5.04 Disability Benefit Payment Commencement Date

(a) A Participant's Disability Benefit shall commence (1) after a benefit application has been duly filed in writing on a forms prescribed by the Board, (2) following the Board's determination that the Participant is Disabled, (3) after the Elimination Period, (4) on the Disability Benefit Payment Commencement Date.

(b) The Board shall establish the Participant's Disability Benefit Payment Commencement Date, which may be set retroactively. In its determination, the Board may consider if the Participant's benefit application (or Social Security Disability benefit application) filing or processing was unreasonably or unnecessarily delayed by the Participant, in which case the Disability Benefit Payment Commencement Date may be set as of a date in the Board's judgment that is later than the earliest possible date.

(c) If the Board determines that a Participant's Disability has ceased within six (6) months of the Disability Date, Disability will be deemed not to have existed and as a condition of continued Employment all Disability Benefits received by such person shall be refunded to the Plan within three (3) months of the date of the Board's determination that Disability does not exist.

5.05 Cessation of Disability Benefits

(a) A Disability Benefit shall be payable during the Participant's continuation of Disability, while the Participant survives, and shall terminate in accordance with the following Sections 5.05(b) through (d).

(b) So long as a Disabled Participant does not withdraw any amount from, takes no benefit from, and does not take a refund of any amount from the Closed DB, UOPP, STAR or Asset Plan (not counting withdrawals from MERP or the Deferred Compensation Plan, which are permitted), the Disability Benefit shall be payable each and every month following the Disability Benefit Payment Commencement Date to the calendar month he or she reaches Social Security Normal Retirement Age, at which time the Participant's Disability Benefit under this Plan shall immediately cease.

(c) In lieu of continuing to receive the Disability Benefit until Social Security Normal Retirement Age under Section 5.05(b), such a Participant may irrevocably elect in writing to

receive any available retirement benefit under the Closed DB, UOPP, STAR or Asset Plan, determined in accordance with the retirement provisions of such plan. If the Participant makes that election under this Section 5.05(c), the Disability Benefit shall last be paid for the calendar month immediately preceding the calendar month for which such retirement benefit is paid or commences. So long as such a Participant does not make the election under this Section 5.05(c), the Disability Benefit shall continue, until terminated under other applicable provisions of the Plan.

(d) If a Participant applies to withdraw any amount, receive any benefit from or take a refund from the Closed DB, UOPP, STAR or Asset Plan other than under Section 5.05(c), the Participant's Disability Benefit under this Plan shall immediately cease, so that there shall be no calendar month during which the Participant receives a Disability Benefit under this Plan and any amount, benefit or refund from Closed DB, UOPP, STAR or Asset Plan.

5.06 Determination of Amount and Payment of Disability Benefit

(a) The Disability Benefit payable to a Disabled Participant in any month shall be the amount of the Net Disability Benefit.

(b) Notwithstanding any offset for Social Security and workers' compensation pursuant to Section 5.07 and any adjustment for Earnings While Disabled pursuant to Section 5.08, the minimum monthly Net Disability Benefit payable under this Plan to a Disabled Participant shall be $150.

5.07 Offset for Social Security and Workers Compensation

(a) A Participant's Gross Disability Benefit shall be reduced, dollar-for-dollar, by the sum determined by the Board in accordance with its procedures, of: (1) the Participant's Social Security benefit, less any attorney fees that were incurred by the Participant in obtaining such benefit and were due to Social Security Administration appeal hearings; plus (2) the Participant's workers' compensation benefits applicable to that month, less any attorney fees that were incurred by the Participant in obtaining such benefit.

(b) For purposes of Section 5.07(a), Social Security benefits shall include the primary benefit amount awarded by the Social Security Administration, whether for disability or retirement, unadjusted for deductions, taxes, Medicare premiums or otherwise. The amount of the Social Security benefit used in the offset shall not thereafter be adjusted after the effective date of the Social Security award, even though the amount of the Social Security benefit actually received by the Participant increases in the future due to cost of living adjustments.

(c) For purposes of Section 5.07(a), workers' compensation benefits shall include amounts paid in a lump sum settlement, which amounts shall be deemed to be received, and shall be applied as an offset, over the period covered by the workers' compensation award.

(d) A Participant shall repay the Fund to the extent the Participant is overpaid any amount, including without limitation the overpayment of a Disability Benefit due to the retroactive award

of a Social Security or workers' compensation benefit. The Board may offset any Disability Benefit for amounts so owed, but this right of offset shall not prevent the Board from employing other means of collection

5.08 Adjustment for Earnings While Disabled

(a) After any offset for Social Security and worker's compensation under Section 5.07, a Participant's Gross Disability Benefit shall be further adjusted by the Board pursuant to its procedures for Earnings While Disabled in accordance with this Section 5.08.

(b) To encourage return to work with the Employer or other employers, there shall be no adjustment for Earnings While Disabled for the first twelve (12) months during which a Participant, who is receiving a Disability Benefit, has Earnings while Disabled, nor shall the mere fact that a Participant has Earnings While Disabled affect the determination as to the existence of a Disability, or the continuation thereof. The 12-month period need not be consecutive, if the Participant's first efforts to return to work are not successful. Further, the Board may grant in its discretion extensions of not more than 6-months for good cause shown, to accommodate, encourage and support a Disabled Participant's efforts to return to work.

(c) There shall be no adjustment to a Participant's Gross Disability Benefit for Earnings While Disabled for any period in which Adjusted Earnings While Disabled are less than 20% of Pre-Disability Compensation.

(d) The Gross Disability Benefit shall be reduced to the $150 per month minimum Disability Benefit for any period in which Adjusted Earnings While Disabled are greater than 80% of Pre-Disability Compensation.

(e) Except as provided in Sections 5.08(b), (c) and (d), the Participant's Gross Disability Benefit for any period shall be reduced by the Board in accordance with its procedures by sixty percent (60%) of Adjusted Earnings While Disabled, in addition to any offset pursuant to Section 5.07.

(f) Unless the Board determines otherwise in its discretion in fairness and equity in a particular case, for good cause shown, a Participant's Adjusted Earnings While Disabled shall be a fixed amount determined by the Board in accordance with its procedures prospectively for a 12-month period based on: (1) the appropriate CPI Deflator; and (2) the Participant's actual annual Earnings While Disabled for the prior calendar year divided by the number of months worked.

(g) The Adjusted Earnings While Disabled of a Disabled Participant shall be re-determined from time to time promptly by the Board in a practical manner based upon the monthly average Earnings While Disabled for the period of time covered by his or her last Disability report filed pursuant to Section 5.09(d). Any re-determined amount of Net Disability Benefit shall not be effective until the calendar month next following, the month in which the Board's redetermination is made, and shall continue for the following 12 months or until re-determined by the Board.

(h) A Participant shall repay the Fund to the extent the Participant is overpaid any amount, including without limitation the overpayment of a Disability Benefit due to Earnings While Disabled. The Board may offset any Disability Benefit for amounts so owed, but this right of offset shall not prevent the Board from employing other means of collection.

5.09 Determination of Disability, and Disability Benefit

(a) The Board shall have the exclusive authority to determine: (1) Disability and continuation of Disability of a Disabled Participant; (2) the Disabled Participant's Gross Disability Benefit; and (3) from time to time, the Net Disability Benefit of the Disabled Participant.

(b) An applicant for a Disability Benefit shall furnish to the Board a Disability application on a form prescribed by the Board, and such other medical or other information as may reasonably be required by the Board for the purpose of establishing Disability and Disability Benefits.

(1) The Board may secure additional medical, vocational, or other evidence as it deems necessary and appropriate, and may require the applicant to submit to any evaluation including, without limitation, occupational or medical evaluations, as the Board or its agent may require.

(2) The Board, in its sole and exclusive discretion, is authorized to engage the services of any other party or parties to provide evaluative, consultative and administrative services which the Board deems necessary to assure qualified occupational and medical review of applications for Disability Benefits, Social Security application assistance, and return to work services. Any third party retained to provide such services shall provide the contracted services solely for the benefit of the Board. Any such contracted evaluation consultation and administration services shall be non-exclusive, and the Board may, in its discretion, retain or engage the services of such other persons as necessary and appropriate to assure appropriate evaluations of Disability applications and administration of Disability Benefits. Regardless of any such engagement of a third party for evaluative, consultative and administrative services, the Board shall retain sole and exclusive jurisdiction with respect to final determinations and adjudications of any and all Disability claims hereunder.

(c) On the basis of a Participant's Disability application and the Disability report filed under Section 5.09(d) and such other medical and other evaluative information as the Board has received, the Board shall determine whether or not the applicant is Disabled, and if so shall determine the amount of his or her Gross Disability Benefit and Net Disability Benefit (as such Net Disability Benefit may be offset and adjusted from time to time).

(d) At least once each calendar year and no more frequently than monthly the Board may require any Disabled Participant who is receiving a Disability Benefit and who has not attained Social Security Normal Retirement Age to submit a Disability report to establish written proof

satisfactory to the Board that he or she is still Disabled and to verify the computation of the Disability Benefit and any offsets or adjustments.

(1) The Disability report shall show whether or not Social Security benefits have been applied for, and if so, the report must be accompanied by a copy of the letter from the Social Security Administration, when issued, stating either (i) the Participant is not eligible for Social Security benefits, or (ii) the amount, if any, of primary Social Security benefits that he or she is receiving.

(2) The Disability report shall show the amount of the Participant's Earnings While Disabled, if any, accompanied by such evidence as the Board may require.

(3) The Disability Report shall include a statement from the Participant's United States licensed physician on the Participant's injury or illness that is the cause of Disability, accompanied by such evidence as the Board may require.

(e) If the Board determines from any medical examination or other evidence that the Disability of a Participant has ceased, his or her Disability Benefit shall thereupon cease as of the last day of the calendar month following written notice from the Board. A Participant whose Disability Benefit has ceased shall have the right to request review of the Board's decision in accordance with Section 2.11. If an individual's Disability Benefit has ceased, so long as the individual thereafter continues Employment as a Participant, the Participant may re-apply for a Disability Benefit prior to attainment of age 65, subject to the applicable requirements of this Article V.

(f) The Board, in its discretion, may suspend or terminate the Disability Benefit of any Participant who fails to make a Disability report, or who delays for any reason in making the Disability report, or who provides false, incorrect or incomplete information in such report.

5.10 Survivor Benefits on Death of a Disabled Participant

(a) If a Disabled Participant dies while entitled to a Disability Benefit, a Survivor Benefit shall be payable monthly until the Participant's Disability Benefit would have ceased under Section 5.05, if the Participant had survived and remained Disabled.

(1) If the Participant would have been entitled to make an election under Section 5.05(c), and had not made the election prior to death, the person initially entitled to the Survivor Benefit under Section 5.10(b) may make the election under Section 5.05(c). If there is more than one such person initially entitled to the Survivor Benefit, unless they all agree on a single election, no election under Section 5.05(c) may be made and this Section 5.10 shall be administered as if no election had been made.

(2) If the Participant made an election under Section 5.05(c), that election shall be binding for purposes of this Section 5.10.

(b) Subject to earlier termination under Section 5.10(a), the Survivor Benefit shall be paid to the deceased Disabled Participant's surviving Spouse until the earlier of: the death of the Spouse or the date the Disabled Participant would have attained Social Security Normal Retirement Age. If there is no surviving Spouse at the death of the Disabled Participant, the Survivor Benefit shall be paid to the natural or legal guardian of any surviving Dependent Children of the Participant for the benefit of those surviving Dependent Children during dependency, which may extend beyond the date the Participant's Disability Benefit would have ceased under Section 5.05(c). If there is more than one surviving Dependent Child, Survivor Benefits shall be distributed per capita among such children so that each shall share equally so long as he or she remains a Dependent Child.

(1) A surviving Spouse or Dependent Child may be entitled to a benefit under the Closed DB, Asset Plan, STAR or UOPP following (but not simultaneously with) the Survivor Benefit payable under this Section 5.10.

(2) The Survivor Benefit provided by this Section 5.10(b) to be paid for the benefit of a Participant's surviving Dependent Children shall terminate when there ceases to be a surviving Dependent Child of the Participant.

(c) The amount of the Survivor Benefit shall equal (1) 50% of the amount of the Disabled Participant's Gross Disability Benefit, less (2) 50% of Social Security disability benefits payable to the surviving Spouse and Dependent Children on account of Disabled Participant's Disability or death, less (3) 50% of the amount of any workers' compensation benefits paid to the Participant in a lump sum settlement, which are deemed to be received over any period following the Participant's death; provided that the minimum Survivor Benefit shall be $150 per month.

(d) Notwithstanding the foregoing, if a Disabled Participant dies and is not survived by a Spouse or Dependent Child, no further benefits shall be paid under this Plan.

(e) If a Disabled Participant is due a monthly Disability Benefit at the time of his or her death, that Disability Benefit shall be paid to his or her surviving Spouse, or if none, to the Dependent Children (in equal shares), or if none, to the Disabled Participant's estate.

5.11 Death in Line of Duty

(a) If a Participant dies In Line of Duty, a Survivor Benefit shall be payable in accordance with Section 5.10 as though the Participant had died after commencing to receive a Disability Benefit.

(b) No surviving Spouse or Dependent Child shall be entitled to a Death Benefit under both Sections 5.10 and 5.11.

5.12 Recurrent Disability

A Participant's Recurrent Disability shall be treated as a continuation of a prior Disability if the Participant has been continuously covered by the Plan as a Participant or Disabled Participant

from the prior Disability Date through the Disability Date of the Recurrent Disability and the Recurrent Disability Date occurs within six (6) months from the last calendar month for which the prior Disability Benefit was paid. The Board shall recalculate a Disabled Participant's Disability Benefit payable after a Recurrent Disability to take account of any increase in Compensation prior to the Recurrent Disability Date.

ARTICLE VI – PAYMENT OF BENEFITS

6.01 General Conditions

(a) Before payment of any benefit hereunder, the Board may require that written application be made by the Participant or Beneficiary, as the case may be, and submitted to the Board in such form and manner as it shall uniformly and non-discriminatorily prescribe.

(b) Any payment made in accordance with the provisions of the Plan to a Participant or Beneficiary, or to their legal representative, shall constitute full satisfaction of claims hereunder against the Trustee and the Board as to the method of computation as well as the amount thereof. The Trustee or the Board may require such Participant, Beneficiary or legal representative, as a condition precedent to such payment, to execute a receipt and release therefor in such form as the Trustee or Board may require.

(c) Distributions shall be made in cash, subject to applicable tax withholding, provided that the Board may establish uniform procedures for the distribution of benefits including, for example and not by way of limitation, direct deposit, debit card and similar electronic funds transfer arrangements, and the Board may require distributions to be made in such forms, as a condition of the benefits.

(d) Notwithstanding any other provision, the Board may establish and amend from time to time administrative procedures for the lump sum payment of small benefit amounts or the payment of consolidated amounts less frequently than monthly, including quarterly, semi-annual or annual payments as the Board may determine efficient and economical.

(e) The Board may require such proper proof of death and such evidence of the right of any person to receive payment of Survivor Benefits as the Board may deem desirable. The Board's determination of death and of the right of any person to receive payment shall be conclusive.

ARTICLE VII - MISCELLANEOUS

7.01 Liability of Employer

No Employee, Participant or Beneficiary shall have any right or claim to any benefit under the Plan except in accordance with its provisions.

7.02 Spendthrift Clause

Except for obligations which may be owed to the Employer, as to which obligations benefits may be applied by the Employer, no benefit under the Plan shall be subject in any manner to anticipation, alienation, sale, transfer, assignment, pledge, encumbrance or charge and any attempt to so anticipate, alienate, sell, transfer, assign, pledge, encumber or charge shall be void. No such benefit shall in any manner be liable for or subject to the debts, contracts, liabilities, engagements or torts of the person entitled to such benefit except as specifically provided in the Plan. In the event that any Participant or Beneficiary has become bankrupt, his or her benefits hereunder shall be protected in accordance with applicable statutes of the State of Tennessee. No interest, right or claim in or to any part of the Trust Fund or any payment therefrom shall be assignable, transferable or subject to sale, mortgage, pledge, hypothecation, garnishment, attachment, execution, or levy of any kind whatsoever, and the Trustee shall not issue any certificate or other documentation representing any interest, right or claim in or to any part of the Trust Fund. Notwithstanding the preceding, withholding of income tax shall not be considered assignment or alienation of benefits under the Plan.

7.03 Successor to Business of Employer

Any successor to the business of the Employer may continue the Plan and such successor shall thereupon succeed to all the rights, powers and duties of the Employer hereunder. The Employment of any Employee who has continued in the employ of such successor which maintains the Plan shall not be deemed to have been terminated or severed for any purpose hereunder.

In the event that the Employer is reorganized without any provision being made for the continuance of this Plan by a successor to the business of the Employer, the Plan shall terminate and the assets shall be distributed as provided in this Article VII.

7.04 Conflict of Provisions

If any provision or term of the Plan, or of the Trust Agreement entered into pursuant hereto, is deemed to be substantively at variance with, or contrary to, any applicable law of the United States or other applicable state law, the provision of the law shall be deemed to govern, but only to the extent necessary to bring the Plan and Trust Agreement into compliance with such law; provided, further, that no provision of state law shall be deemed to govern if it would disqualify the Plan and Trust Agreement under Code § 501(c)(9).

7.05 Headings

The headings and subheadings in the Plan have been inserted for convenience of reference only and are to be ignored in any construction of the provisions hereof.

7.06 Construction

In the construction of the Plan, wherever any words are used herein in the masculine, feminine or neuter gender, they shall be construed as though they were also used in another gender in all cases where they would so apply, and whenever any words are used herein in the singular or plural form, they shall be construed as though they were also used in the other form in all cases where they would so apply. The Plan shall be construed in accordance with the laws of the State of Tennessee. The Plan shall be administered at all times in accordance with and construed to be consistent with Code Section 501(c)(9) and its accompanying regulations.

7.07 Acceptance

The Plan shall not be deemed to constitute a contract between the Employer and an Employee; neither shall it be a consideration nor an inducement for the Employment of any Employee. No provisions of the Plan shall be deemed to abridge or limit any managerial right of the Employer, give any Employee the right to be retained in Employment, or to interfere with the right of the Employer to discharge any Employee at any time regardless of the effect which such discharge may have on him or her as a Participant. By participation in the Plan as a condition of Employment, each Participant on behalf of himself or herself, his or her heirs and assigns, and Beneficiary shall be deemed conclusively to have agreed to and accepted the terms and conditions of the Plan.

7.08 Claims

Any payment of benefits to a Participant or Beneficiary, or to their legal representatives, in accordance with the provisions of the Plan, shall to the extent of the method of computation as well as the amount thereof constitute full satisfaction of all claims hereunder against the Trustee, the Board and the Employer, any of whom may require such Participant, Beneficiary or legal representative, as a condition precedent to such payment, to execute a receipt and release therefor in such form as shall be determined by the Trustee, the Board or the Employer, as the case may be.

7.09 Legally Incompetent

If any Participant or Beneficiary is a minor or is in the judgment of the Board otherwise legally incapable of personally receiving and giving a valid receipt for any payment due under the Plan, the Board may, unless and until claim shall have been made by a guardian or conservator of such person, duly appointed by a court of competent jurisdiction, direct the Trustee that such payment or any part thereof be made to such person, or such person's Spouse, child, parent, brother or sister, or other person deemed by the Board to be a proper person to receive such payment. Any payment so made shall be a complete discharge of any liability under the Plan for such payment.

7.10 Correction of Errors

If any error in any account or record is discovered which would result in any Participant's benefit being more or less than it should have been had the error not occurred or had the record been correct, the Board or the Executive Director shall correct the error. Such errors may be corrected by adjusting, to the extent reasonable and practicable, the benefit by increasing or decreasing the benefit amount as it is regularly distributed. In making such adjustments, the Executive Director shall take into account the relative equities of the Plan and the Participant, including without limitation, the party that held the higher likelihood of discovering the error in the timeliest manner, and the relative economic hardship of the Board and the Participant of correcting the error within a reasonable period of time. The Executive Director is authorized to enter into repayment agreements with a Participant or Beneficiary in cases in which the Participant or Beneficiary has received funds or benefits the Participant or Beneficiary was not otherwise entitled to receive under the Plan. Any such correction shall be conclusive and binding on all Participants and Beneficiaries. In the event of failure of a Participant or Beneficiary to fulfill the terms of a repayment agreement, the Executive Director and the General Counsel are authorized to initiate such proceedings at law as are proper and expedient under the circumstances to recover funds erroneously paid to Participants or Beneficiaries.

7.11 Acts of Dishonesty; Conviction of Crimes

Any person who shall knowingly and willfully make any false statement, or shall falsify or permit to be falsified any record or records of the Plan or System, in any attempt to defraud the Plan or System in any manner, shall be subject to punishment prescribed by law. The Board shall have the right to bring appropriate legal proceedings, both civil and criminal, against such person for commission of any act which is a cause of action under the civil or criminal laws of this jurisdiction which falls within the coverage of this Section 7.11. Upon conviction in criminal proceedings, or upon the rendition of a judgment against such person in a civil proceeding, in either case having been rendered by a court having jurisdiction of the parties and subject matter, such persons shall forfeit all amounts, rights and benefits which he or she would otherwise be entitled to receive under the provisions of the Plan.

In addition, as provided in Charter § 7.04I, any County elected official or Employee who is convicted of a felony in the discharge of County governmental duties shall forfeit any benefits under the provisions of the Plan.

7.12 Lost Participants

If any Participant, former Participant or Beneficiary who is entitled to receive any benefit hereunder cannot be located through the usual means of communication when such benefit is due and payable, and after further diligent effort to ascertain the whereabouts of such Participant or Beneficiary, then the benefit payable to such Participant or Beneficiary may be treated as Forfeiture. In the event a Participant or Beneficiary is subsequently located, such forfeited benefit shall be restored unadjusted for earnings or losses from the date of forfeiture.

7.13 Reserved.

7.14 Legal Action

In the event any claim, suit, or proceeding is brought or threatened regarding the Plan and/or Trust Fund to which the Trustee, the Employer or the Board, or any Employee or public official acting in good faith for or on behalf of the Plan is or may be a party, they shall be entitled to reasonable advances, or to be reimbursed, from the Trust Fund for any and all reasonable costs, attorney's fees (where the Board's counsel cannot represent any such party), and other expenses pertaining thereto incurred by them for which they shall have become liable. The Board shall be responsible for any determinations under this Section 7.14 and its decisions shall be final and binding.

7.15 Prohibition against Diversion of Funds

(a) Except as provided below and otherwise specifically permitted by law, it shall be impossible by operation of the Plan or of the Trust, by termination of either, by power of revocation or amendment, by the happening of any contingency, by collateral arrangement or by any other means, for any part of the corpus or income of any trust fund maintained pursuant to the Plan or any funds contributed thereto to be used for, or diverted to, purposes other than the exclusive benefit of Participants or Beneficiaries.

(b) Employer Contributions shall be made irrevocably and it shall be impossible for the assets of the Plan to inure to the benefit of the Employer, or to be used in any manner other than for the exclusive purpose of either providing benefits to Participants and Beneficiaries or defraying reasonable expenses of administering the System; provided, however, that nothing herein shall be construed to prohibit the return to the Employer of all or part of a contribution as follows:

(1) Which is made by the Employer by a mistake of fact, provided the return of such contribution is made within one (1) year after the payment thereof,

(2) Which is conditioned upon initial Internal Revenue Service qualification of the Plan; provided the return is made within one (1) year after the denial of qualification of the Plan.

7.16 Protective Clause

Neither the Employer, the Board nor the Trustee, nor their successors shall be responsible for the validity of any Contract issued hereunder or for the failure on the part of the insurer to make payments provided by any such Contract, or for the action of any person which may delay payment or render a Contract null and void or unenforceable in whole or in part.

7.17 Receipt and Release for Payments

Any payment to any Participant, his legal representative, Beneficiary, or to any guardian or committee appointed for such Participant or Beneficiary in accordance with the provisions of the Plan, shall, to the extent thereof, be in full satisfaction of all claims hereunder against the Trustee and the Employer, either of whom may require such Participant, legal representative, Beneficiary, guardian or committee, as a condition precedent to such payment, to execute a receipt and release thereof in such form as shall be determined by the Trustee or Employer.

7.18 Named Fiduciaries and Allocation of Responsibility

The "named Fiduciaries" of this Plan are (1) the Employer, (2) the Board and any individual(s) appointed to perform the duties of Administrator and (3) the Trustee. The named Fiduciaries shall have only those specific powers, duties, responsibilities, and obligations as are specifically given them under the Plan or as accepted by or assigned to them pursuant to any procedure provided under the Plan, including but not limited to any agreement allocating or delegating their responsibilities, the terms of which are incorporated herein by reference. In general, unless otherwise indicated herein or pursuant to such agreements, the Board shall have the duties specified in Article II, as the same may be allocated or delegated thereunder. Provided, however, the Employer shall have the responsibility for making the contributions provided for under the Plan. The Board shall have the authority to appoint and remove the Trustee; to formulate the Plan's "funding policy and method"; and to amend or terminate, in whole or in part, the Plan. The Board shall have the responsibility for the administration of the Plan, including but not limited to the items specified in Article II, as the same may be allocated or delegated thereunder. The Trustee shall have the responsibility of management and control of the assets held under the Trust, except with respect to those assets, the management of which has been assigned to an Investment Manager, who shall be solely responsible for the management of the assets assigned to it, all as specifically provided in the applicable Article of the Plan and any agreement with the Trustee. Each named Fiduciary warrants that any directions given, information furnished, or action taken by it shall be in accordance with the provisions of the Plan, authorizing or providing for such direction, information or action. Furthermore, each named Fiduciary may rely upon any such direction, information or action of another named Fiduciary as being proper under the Plan, and is not required under the Plan to inquire into the propriety of any such direction, information or action. It is intended under the Plan that each named Fiduciary shall be responsible for the proper exercise of its own powers, duties, responsibilities and obligations under the Plan as specified or allocated herein. No named Fiduciary shall guarantee the Trust Fund in any manner against investment loss or depreciation in asset value. Any person or group may serve in more than one Fiduciary capacity. In the furtherance of their responsibilities hereunder, the "named Fiduciaries" shall be empowered to interpret the Plan and Trust and to resolve ambiguities, inconsistencies and omissions, which findings shall be binding, final and conclusive.

7.19 Uniformity

All provisions of the Plan shall be interpreted and applied in a uniform, nondiscriminatory manner. In the event of any conflict between the terms of the Plan and any Contract purchased hereunder, the provisions of the Plan shall control.

7.20 Amendment of Plan

The Board reserves the right, power, and authority, by instrument in writing duly executed, to freeze, suspend, or modify benefits, Employer Contributions, Plan terms, impose Employee contributions, and design prospectively or to terminate the Plan consistent with applicable requirements of state and federal law; provided, any amendment or termination of any provision of the Plan may be adopted by the Board after two readings, but only if an actuarial determination by the Actuary to the System of its effect on the soundness of the Plan's design of benefits as well as its effect on the cost of the Plan has been disclosed in a public hearing. Notice of such hearing shall be published one day in each of three consecutive weeks, commencing at least 21 days prior to the date of the first reading, in a daily or weekly newspaper of wide circulation in Knox County.

Nothing under state law, the Charter or the Plan may confer to Participants an implied right to future benefit arrangements or, for Participants who are not then Disabled, to continued coverage under this Plan. Further, Participants may not assert the indefinite continuation of the formulas, contribution rates, and eligibility ages in effect at the time of employment.

(a) No such amendment shall cause or permit any part of the Fund to be used for, or diverted to, purposes other than for the exclusive benefit of Participants, surviving Spouses, Dependent Children and Beneficiaries, and no amendment shall have the effect of re-vesting in the Employer any portion of such Funds.

(b) An amendment may modify, alter, or amend, freeze, or terminate benefits that would otherwise accrue or Vest under the Plan after the date such amendment is adopted. No benefits are Vested under this Plan prior to a Participant's Disability Date.

(c) Any amendment which affects the rights, duties or responsibilities of the Trustee, other than an amendment to remove the Trustee, may only be made with the Trustee's written consent. The Trustee shall not be required to execute any such amendment unless the Trust provisions contained herein are a part of the Plan and the amendment affects the duties of the Trustee hereunder. No amendment shall operate to increase the duties and responsibilities of the Trustee except by written instrument duly executed by and between the Board, subject to the provisions of the Charter, and the Trustee.

(d) Any such amendment shall become effective as provided therein upon its execution.

7.21 Termination of Plan

(a) Although the Employer expects the Plan to be continued indefinitely, it reserves the right at any time to terminate all or any component of the Plan by action of the Board and to discontinue all contributions from time to time as it shall deem appropriate and necessary, and such suspension of contributions shall not be considered to be a termination of the Plan. In the event of termination of the Plan or a complete discontinuance of contributions to the Plan, the Board shall notify the Trustee in writing of such termination and, prior to any distribution of assets hereunder, shall file notice with the Internal Revenue Service.

(b) Upon termination or partial termination of the Plan, or upon complete discontinuance of contributions, the Board, by written notice of termination of the Plan, shall direct the Trustee to continue to hold, manage or distribute the assets of the Fund to the Participants or Beneficiaries, as the case may be, in accordance with such directions.

7.22 Failure of Internal Revenue Service Qualification

The Plan is adopted by the Employer upon the condition that it shall qualify initially under the applicable provisions of the Code. Therefore, if the Plan fails to so qualify, as evidenced by receipt of a letter to such effect from the Internal Revenue Service, then the Employer reserves the following:

(a) in the case of the initial adoption and qualification of the Plan, the right to withdraw and terminate the Plan, whereupon no Participant shall have any right or claim to any of the assets hereunder which are derived from Employer contributions, notwithstanding any other provision hereof; or

(b) The right to amend the Plan to the extent necessary to secure a favorable determination that the Plan is so qualified.

7.23 Merger or Consolidation

This Plan may be merged or consolidated with, or its assets and/or liabilities may be transferred to any other plan and trust only if the benefits which would be received by a Participant whose Disability Date occurs prior to the date of such transfer, merger or consolidation, in the event of a termination of the plan immediately after such transfer, merger or consolidation, are at least equal to the benefits the Participant would have received if the Plan had terminated immediately before the transfer, merger or consolidation.

Following a public notice on ~~April 28, 2024, May 5, 2024, and May 12, 2024~~February 1, 2026, February 8, 2026, and February 15, 2026.

We hereby certify that the above stated **Knox County Employee Disability Benefit Plan** was duly adopted pursuant to the provisions of the Charter and shall be effective on the first day of ~~July 2024~~April 2026.

_____

Executive Director, Knox County Retirement & Pension Board

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RLA-18257 **R-26-3-904**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: SHERIFF

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, approving Amendment Four to a Grant Contract with the Tennessee Department of Human Services related to IV-D Magistrate services for the Knox County Juvenile Court, which amendment increases the maximum liability of the State under the Contract by $429,064.02, increases the local match requirement by $221,032.98, and extends the term of the Contract to end June 30, 2027. **(TO BE ADDED)**

(Juvenile Court)

Attachments

Resolution

Contract Amendment

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, APPROVING AMENDMENT FOUR TO A GRANT CONTRACT WITH THE TENNESSEE DEPARTMENT OF HUMAN SERVICES RELATED TO IV-D MAGISTRATE SERVICES FOR THE KNOX COUNTY JUVENILE COURT, WHICH AMENDMENT INCREASES THE MAXIMUM LIABILITY OF THE STATE UNDER THE CONTRACT BY $429,064.02, INCREASES THE LOCAL MATCH REQUIREMENT BY $221,032.98, AND EXTENDS THE TERM OF THE CONTRACT TO END JUNE 30, 2027.

RESOLUTION: **R-26-3-904**

REQUESTED BY: **JUVENILE COURT**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, by means of Resolution R-23-5-910, the Knox County Commission (the "Commission") approved a contract from the Tennessee Department of Human Services, designated as State Contract 77919, for the provision of IV-D child support enforcement magistrate services for the Knox County Juvenile Court for the period beginning July 1, 2023 and ending June 30, 2024 (the "Grant Contract"); and

WHEREAS, by means of Resolution R-24-2-902, the Commission approved Amendment One to the Grant Contract to increase the maximum liability of the State by $7,867.91 for a total maximum liability of $346,214.22 and to increase the local match requirement by $4,053.17; and

WHEREAS, by means of Resolution R-24-3-902, the Commission approved Amendment Two to the Grant Contract to increase the maximum liability of the State by $399,712.00 for a total maximum liability of $745,926.22, increase the local match requirement by $205,912.23, and extend the term to expire June 30, 2025; and

WHEREAS, by means of Resolution R-25-3-901, the Commission approved Amendment Three to the Grant Contract to increase the maximum liability of the State by $422,156.60 for a total maximum liability of $1,168,082.82, increase the local match requirement by $217,474.61, and extend the term to expire June 30, 2026; and

WHEREAS, Knox County and the Tennessee Department of Human Services now desire to enter into Amendment Four to the Grant Contract to increase the maximum liability of the State by $429,064.02 for a new total maximum liability of $1,597,146.84, increase the local match requirement by $221,032.98, and extend the term of the Grant Contract by one (1) year to expire June 30, 2027, as further detailed in the attached amendment.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

Amendment Four of Contract 77919 with the Tennessee Department of Human Services for the provision of IV-D child support enforcement magistrate services for the Knox County Juvenile Court is hereby adopted and approved in substantive form as presented this date, a copy of which is attached to this Resolution and incorporated herein by reference.

BE IT FURTHER RESOLVED, that Amendment Four of Contract 77919 with the Tennessee Department of Human Services for the provision of IV-D child support enforcement magistrate services for the Knox County Juvenile Court shall be executed subject to such amendment or action not affecting the substantive provisions of the contract as may be required and approved by the Knox County Law Director.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

Presiding Officer of the Commission **Date**

County Clerk **Date**

Approved: **County Mayor** **Date**

Vetoed: **County Mayor** **Date**

CONTRACT AMENDMENT COVER SHEET

Agency Tracking #	Edison ID	Contract #	Amendment #
34513-20424	77919		4

Contractor Legal Entity Name	Edison Vendor ID
Knox County	2699

Amendment Purpose & Effect(s)

Extend term, Increase maximum liability, Revise scope, E2 and E3. Add attach A-3

Amendment Changes Contract End Date: [x] YES [ ] NO **End Date:** June 30, 2027

TOTAL Contract Amount INCREASE or DECREASE per this Amendment (zero if N/A): $ 429,064.02

Funding ---

FY	State	Federal	Interdepartmental	Other	TOTAL Contract Amount
2024	$0.00	$346,214.22	$0.00	$0.00	$346,214.22
2025	$0.00	$399,712.00	$0.00	$0.00	$399,712.00
2026	$0.00	$422,156.60	$0.00	$0.00	$422,156.60
2027	$0.00	$429,064.02	$0.00	$0.00	$429,064.02
2028	$0.00	$0.00	$0.00	$0.00	$0.00
2029	$0.00	$0.00	$0.00	$0.00	$0.00
TOTAL:	**$0.00**	**$1,597,146.84**	**$0.00**	**$0.00**	**$1,597,146.84**

Budget Officer Confirmation: There is a balance in the appropriation from which obligations hereunder are required to be paid that is not already encumbered to pay other obligations.

Winfield Shiers

Speed Code (optional)	Account Code (optional)
	71301000

CPO USE

AMENDMENT FOUR
OF CONTRACT 77919

This Amendment is made and entered by and between the State of Tennessee, Department of Human Services, hereinafter referred to as the "State" and Knox County, hereinafter referred to as the "Contractor." For good and valuable consideration, the sufficiency of which is hereby acknowledged, it is mutually understood and agreed by and between said, undersigned contracting parties that the subject contract is hereby amended as follows:

1. The following is added as Contract Section A.30.

A.30. Artificial Intelligence (AI) Use and Compliance Requirements. The Contractor agrees that any product, service, or solution incorporating Artificial Intelligence (AI), including Generative AI (GenAI), procured under this Contract shall comply fully with the State of Tennessee's **Enterprise Artificial Intelligence Policy (Policy 200-POL-007)**, available at: https://www.tn.gov/content/dam/tn/finance/artificial-intelligence/Enterprise_Artificial_Intelligence_Policy.pdf

The Contractor further agrees to the following:

a. **Data Privacy and Security**
Contractor shall not use, access, store, transmit, or process any State Data—including but not limited to confidential, privileged, personally identifiable information (PII), protected health information (PHI), Payment Card Industry (PCI) data, criminal justice information (CJIS), federal tax information (FTI), Centers for Medicare & Medicaid Services (CMS) data, Social Security Administration (SSA) data, Family Education Rights & Privacy Act (FERPA) data, or internal communications—through any AI tools or platforms unless:

1. The AI tool is explicitly approved in writing by the State.

2. The tool is operated within a secure State-controlled or approved environment.

b. **Prohibition on Model Training**
Contractor shall not use State Data to train, fine-tune, or otherwise improve AI models, unless expressly authorized in writing by the State and in accordance with Policy No. 200-POL-007.

c. **Transparency and Accountability**
Contractor shall clearly disclose when AI tools are used in providing services or generating content on behalf of the State. Contractor is responsible for the accuracy, reliability, and appropriateness of all AI-generated outputs.

d. **Use of Approved Tools Only**
Only State-approved AI platforms, systems, or services may be used in the performance of this Contract. Use of public, consumer, or non-State-managed AI platforms (e.g., ChatGPT, Google Gemini, etc.) with State Data is strictly prohibited unless authorized in writing.

e. **Ongoing Compliance and Risk Mitigation**
Contractor shall ensure continued compliance with evolving State and federal regulations related to AI. The State reserves the right to audit or review AI usage under this Agreement at any time.

f. **Indemnification**
Contractor shall further indemnify and hold harmless the State in accordance with the Hold Harmless section of this Agreement for any unauthorized disclosure, misuse, or

compromise of State Data resulting from AI-related processing that violates this Agreement or State policy.

2. Contract Section B.1. is deleted in its entirety and replaced with the following:

   B.1. This Contract shall be effective for the period beginning on July 1, 2023 ("Effective Date") and ending on June 30, 2027, ("Term"). The State shall have no obligation for goods delivered or services provided by the Contractor prior to the Effective Date.

3. Contract Section B.2. is deleted in its entirety and replaced with the following:

   B.2. Renewal Options. This Contract may be renewed upon satisfactory completion of the Term. The State reserves the right to execute up to one (1) renewal options under the same terms and conditions for a period not to exceed twelve (12) months each by the State, at the State's sole option. In no event, however, shall the maximum Term, including all renewals or extensions, exceed a total of sixty (60) months.

4. Contract Section C.1. is deleted in its entirety and replaced with the following:

   C.1. Maximum Liability. In no event shall the maximum liability of the State under this Contract exceed one million five hundred ninety-seven thousand one hundred forty-six dollars and eighty-four cents ($1,597,146.84). This amount shall constitute the entire compensation due the Contractor for all service and Contractor obligations hereunder regardless of the difficulty, hours worked, or materials or equipment required. The Contract Amount includes, but is not limited to, all applicable taxes, fees, overhead, profit, and all other direct and indirect costs incurred or to be incurred by the Contractor.

5. Contract Section C.3. is deleted in its entirety and replaced with the following:

   C.3. The Contractor shall be reimbursed for actual, reasonable, and necessary costs based upon the Contract Budget, not to exceed the Maximum Liability established in Section C.1. Upon progress toward the completion of the Scope, as described in Section A of this Contract, the Contractor shall submit invoices prior to any reimbursement of allowable costs. The Contract Budget, attached and incorporated hereto as Attachment A, A-1, A-2, and A-3 shall constitute the maximum amount due the Contractor under this Contract. The Contract Budget line-items include, but are not limited to, all applicable taxes, fees, overhead, and all other direct and indirect costs incurred or to be incurred by the Contractor that are allowable.

6. Contract Section E.2. is deleted in its entirety and replaced with the following:

   E.2. Communications and Contacts. All instructions, notices, consents, demands, or other communications required or contemplated by this Contract shall be in writing and shall be made by certified, first class mail, return receipt requested and postage prepaid, by overnight courier service with an asset tracking system, or by email or facsimile transmission with recipient confirmation. All communications, regardless of method of transmission, shall be addressed to the respective Party at the appropriate mailing address, facsimile number, or email address as stated below or any other address provided in writing by a Party.

   The State:

   Stacie Alexander, Director, Central Registry and Child Support Contracts
   Department of Human Services
   505 Deaderick Street
   James K. Polk Building, 16th Floor
   Nashville, TN 37243
   Email: CsContract.ManagementUnit@tn.gov
   CC: Stacie.Alexander@tn.gov
   Phone # (615) 742-4431
   Fax # (615) 524-3212

Nat Chapman, Program Coordinator, Child Support Contracts
Department of Human Services
505 Deaderick Street
James K. Polk Building, 16th Floor
Nashville, TN 37243
Email: CsContract.ManagementUnit@tn.gov
CC: Nat.Chapman@tn.gov
Phone # (615) 253-1890

The Contractor:

Heidi Garrett, Court Director
Knox County Juvenile Court
3323 Division Street
Knoxville, TN 37919
Email: Heidi.Garrett@knoxcounty.org
Phone # (865) 215-6417

All instructions, notices, consents, demands, or other communications shall be considered effective upon receipt or recipient confirmation as may be required.

7. Contract Section E.3. is deleted in its entirety and replaced with the following:

E.3. Subject to Funds Availability. The Contract is subject to the appropriation and availability of State and/or Federal funds. In the event that the funds are not appropriated or are otherwise unavailable, the State reserves the right to terminate or suspend the Contract upon written notice to the Contractor. Said termination or suspension shall not be deemed a breach of Contract by the State. Upon receipt of the written notice, the Contractor shall cease all work associated with the Contract. Should such an event occur, the Contractor shall be entitled to compensation for all satisfactory and authorized services completed as of the termination or suspension date but shall not be entitled to compensation for any services performed subsequent to termination date or during a period of suspension. Upon such termination or suspension, the Contractor shall have no right to recover from the State any actual, general, special, incidental, consequential, or any other damages whatsoever of any description or amount.

8. Contract Attachment A-3 attached hereto is added as a new Attachment.

Required Approvals. The State is not bound by this Amendment until it is signed by the contract parties and approved by appropriate officials in accordance with applicable Tennessee laws and regulations (depending upon the specifics of this contract, said officials may include, but are not limited to, the Commissioner of Finance and Administration, the Commissioner of Human Resources, and the Comptroller of the Treasury).

Amendment Effective Date. The revisions set forth herein shall be effective July 1, 2026. All other terms and conditions of this Contract not expressly amended herein shall remain in full force and effect.

IN WITNESS WHEREOF,

KNOX COUNTY:

GLENN JACOBS, KNOX COUNTY MAYOR **DATE**

DEPARTMENT OF HUMAN SERVICES:

CLARENCE H. CARTER, COMMISSIONER **DATE**

GRANT BUDGET				
Knox County - Juvenile Court				
APPLICABLE PERIOD: The grant budget line-item amounts below shall be applicable only to expenses incurred during the period beginning July 1, 2026, and ending June 30, 2027.				
	EXPENSE OBJECT LINE-ITEM CATEGORY [1]	**GRANT CONTRACT**	**GRANTEE PARTICIPATION**	**TOTAL PROJECT**
	Salaries [2]	**$308,939.40**	**$159,150.60**	**$468,090.00**
	Benefits & Taxes	**$92,384.82**	**$47,592.18**	**$139,977.00**
	Professional Fees/Grant & Awards [2]	**$1,207.80**	**$622.20**	**$1,830.00**
	Supplies	**$4,026.00**	**$2,074.00**	**$6,100.00**
	Telephone	**$2,640.00**	**$1,360.00**	**$4,000.00**
	Postage & Shipping	**$0.00**	**$0.00**	**$0.00**
	Occupancy	**$10,708.50**	**$5,516.50**	**$16,225.00**
	Equipment Rental & Maintenance	**$5,197.50**	**$2,677.50**	**$7,875.00**
	Printing & Publications	**$330.00**	**$170.00**	**$500.00**
	Travel, Conferences & Meetings [2]	**$1,980.00**	**$1,020.00**	**$3,000.00**
	Interest [2]	**$0.00**	**$0.00**	**$0.00**
	Insurance	**$1,650.00**	**$850.00**	**$2,500.00**
	Specific Assistance To Individuals [2]	**$0.00**	**$0.00**	**$0.00**
	Depreciation [2]	**$0.00**	**$0.00**	**$0.00**
	Other Non-Personnel [2]	**$0.00**	**$0.00**	**$0.00**
	Capital Purchase [2]	**$0.00**	**$0.00**	**$0.00**
	Indirect Cost (% and method)	**$0.00**	**$0.00**	**$0.00**
	In-Kind Expense	**$0.00**	**$0.00**	**$0.00**
	GRAND TOTAL	**$429,064.02**	**$221,032.98**	**$650,097.00**

[1] Each expense object line-item shall be defined by the *U.S. OMB's Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, Subpart E Cost Principles* (posted on the Internet at: https://www.ecfr.gov/current/title-2subtitle-A/chapter-II/part-200/subpart-E) and CPO Policy 2013-007 (posted online at: https://www.tn.gov/generalservices/procurement/central-procurement-office--cpo-/library-/html).

[2] Applicable detail follows this page if line-item is funded.

GRANT BUDGET LINE-ITEM DETAIL:

SALARIES	AMOUNT
Three Magistrates Full-time positions	$468,090.00
TOTAL	**$468,090.00**

PROFESSIONAL FEE/ GRANT & AWARD	AMOUNT
TN Professional Privilege Tax	$1,830.00
TOTAL	**$1,830.00**

TRAVEL/CONFERENCES & MEETINGS	AMOUNT
Registration for conference for 3 magistrates (CLE) and other related expenses	$3,000.00
TOTAL	**$3,000.00**

RLA-18244 **R-26-3-101**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Drucilla Stills, COUNTY COMMISSION
Department:	COUNTY COMMISSION
Requires Expenditure of Funds:	Funded in Current Budget:
Appropriation Required:	

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring Sterling "Sterl the Pearl" Henton for his dedication to the community, passionate leadership, and unending Volunteer Spirit.
(Commissioner Jay)

Attachments

Resolution

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, HONORING STERLING "STERL THE PEARL" HENTON FOR HIS DEDICATION TO THE COMMUNITY, PASSIONATE LEADERSHIP, AND UNENDING VOLUNTEER SPIRIT.

RESOLUTION: R-26-3-101

REQUESTED BY: COMMISSIONER JAY

PREPARED BY: COMMISSIONER JAY

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Sterling L. Henton, affectionately known as "DJ Sterl the Pearl," is a distinguished community leader, entrepreneur, entertainer, and motivational speaker whose commitment to service, excellence, and empowerment has positively impacted the citizens of Knoxville and Knox County, Tennessee and beyond; and

WHEREAS, Mr. Henton began demonstrating leadership and artistic talent at an early age, where at age 8 he was spinning records at elementary school events and local parties; and

WHEREAS, Mr. Henton's higher education pursuits earned distinction as a standout student-athlete at the University of Tennessee, where he served as starting

quarterback for the Tennessee Volunteers football program, contributing to four bowl victories and back-to-back Southeastern Conference championships while exemplifying character and academic dedication; and

WHEREAS, during his collegiate career, Mr. Henton also demonstrated cultural leadership as President of Omega Psi Phi Fraternity and as founder of the pioneering hip-hop radio program "Club 90" at WUTK-FM / New Rock 90.3, fostering artistic expression and unity among students and the broader community; and

WHEREAS, following his athletic career, Mr. Henton transitioned his talents into media, entertainment, and entrepreneurship, becoming a respected television and radio personality, actor, and the Official DJ for Tennessee Volunteers, where he continues to energize hundreds of thousands of fans and strengthens community spirit through music and engagement; and

WHEREAS, after graduating from the University of Tennessee, Henton played in Arena Football leagues before transitioning to a successful entertainment career starring in acclaimed TV shows, including "Survivor's Remorse," "Empire," "Nashville," and "Homicide Hunter," and was cast in the film "All Eyez on Me;" and

WHEREAS, as Chief Executive Officer of Rev It Up, LLC, Mr. Henton has built a business dedicated to entertainment excellence, team building, and motivational engagement, earning recognition including the *Comcast RISE Technology Makeover Award* for his leadership as a minority-owned small business operator; and

WHEREAS, Mr. Henton has demonstrated an unwavering commitment to youth development and community service through mentorship programs, keynote addresses, school and nonprofit partnerships, and service with organizations such as Knoxville Children's Theatre, The Change Center, Knoxville's Sons Summit, Metro Drug Coalition, SEEED Knoxville, Knox Area Urban League, Youth Ignite, Knoxville Zoo, OG Servant Leaders and the Boys & Girls Club; and

WHEREAS, DJ Sterl the Pearl is more than just a name and performer — Sterling Henton is a catalyst for connection, celebration, and community uplift. Whether he's hosting a stadium crowd, mentoring young leaders, or supporting local nonprofits, Sterling Henton brings his signature energy and purpose, fostering environments where people feel inspired, included, and empowered to shine.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Commission of Knox County hereby honors Sterling "DJ Sterl the Pearl" Henton for his dedication to the community, passionate leadership, and unending Volunteer Spirit.

BE IT FURTHER RESOLVED, that we commend Mr. Henton's enduring commitment to uplifting others, strengthening community bonds, and representing Knoxville and Knox County with excellence and pride.

BE IT FURTHER RESOLVED, that this Resolution be spread upon the official records of this body and that a copy be presented to Sterling L. Henton as a symbol of our appreciation and respect.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

RLA-18245 **R-26-3-102**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COUNTY COMMISSION

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring the Central High School Lady Bobcats Basketball Team for winning the District Championship.
(Commissioner Durrett)

Attachments

Resolution

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, HONORING THE CENTRAL HIGH SCHOOL LADY BOBCATS BASKETBALL TEAM FOR WINNING THE DISTRICT CHAMPIONSHIP.

RESOLUTION: R-26-3-102

REQUESTED BY: COMMISSIONER DURRETT

PREPARED BY: COMMISSIONER DURRETT

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, the student-athletes of the Knoxville Central High School Lady Bobcats Basketball Team demonstrated exceptional dedication, teamwork, and perseverance throughout the 2025–2026 basketball season; and

WHEREAS, through hard work, discipline, and commitment to excellence both on and off the court, the Lady Bobcats represented their school and the Knoxville community with pride and outstanding sportsmanship; and

WHEREAS, the Knoxville Central High School Lady Bobcats captured the District Championship, a remarkable accomplishment that reflects the team's talent, preparation, and determination throughout the season; and

WHEREAS, in the district championship game, the Lady Bobcats achieved an impressive victory over the tournament's top-seeded team, the Powell High School Lady Panthers, demonstrating resilience, skill, and determination under pressure; and

WHEREAS, this victory represents the first District Championship for the Lady Bobcats since the 1950s, ending a decades-long championship drought and marking a historic milestone for the program, the school, and the community; and

WHEREAS, this achievement was made possible through the dedication and talent of the student-athletes and staff, including Avery Brewer, Tieghley Fowler, Malia Moore, Brytin Fowler, Kemaujah Littlejohn, Almiah Torrah, Ja'ryah Winton, Sasha Foster, Ayauna Ramsey, Terrah Minor, and Rhalee Haunhorst, under the leadership of Head Coach LeBrandon Marie, Assistant Coaches Lynn Clemmons and Brittany Brewer, and Team Manager Bella Marlow; and

WHEREAS, the coaches, families, and supporters of the Lady Bobcats have provided invaluable leadership and encouragement throughout the season; and

WHEREAS, the Lady Bobcats' championship season serves as an inspiration to young athletes throughout the community and reflects the values of teamwork, perseverance, and excellence fostered by Knoxville Central High School.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby recognizes and honors the Knoxville Central High School Lady Bobcats Basketball Team for winning the District Championship, defeating the top-seeded Powell Lady Panthers in the championship game, and commends the players, coaches, and supporters for their outstanding achievement and exemplary representation of their school and community.

BE IT FURTHER RESOLVED, that the Knox County Commission congratulates the Lady Bobcats on their historic accomplishment and wishes them continued success in their future athletic and academic pursuits.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor **Date**

Vetoed:_____

County Mayor **Date**

RLA-18248 **R-26-3-103**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Drucilla Stills, COUNTY COMMISSION
Department:	COUNTY COMMISSION
Requires Expenditure of Funds:	Funded in Current Budget:
Appropriation Required:	

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring the 250th Anniversary of the U.S. Postal Service.
(Full Commission)

Attachments

Resolution

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, HONORING THE 250TH ANNIVERSARY OF THE U.S. POSTAL SERVICE.

RESOLUTION: **R-26-3-103**

REQUESTED BY: **FULL COMMISSION**

PREPARED BY: **COMMISSIONER LEE**

APPROVED AS TO FORM AND CORRECTNESS_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, 2025 is the year of the 250th Anniversary of the creation of the United States Post Office, the predecessor of the modern Postal Service, one year earlier than the founding of the country itself, and later enshrined in the U.S. Constitution; and

WHEREAS, the Postal Service has played a significant role in the historical development of the country from the establishment of roads, railways, and airlines, and a vital part of the fabric binding together the people of the country; and

WHEREAS, the Universal Service Obligation (USO) in current law which enables the population to receive equal and affordable services no matter who we are or where we live is a democratic right of the people; and

WHEREAS, the U.S. Postal Service serves 169 million addresses six, and sometimes, seven days a week; and

WHEREAS, the USPS does not receive taxpayer money but rather runs on its own revenue created by postage and postal products; and

WHEREAS, due to its public mission, the Postal Service is the low-cost anchor of the $1.3 trillion dollar mailing and package industry which supports 7 million jobs across the country; and

WHEREAS, the Postal Service is an important source of good, union, living-wage jobs with fair hiring practices and equal pay for equal work for workers from all walks of life, and is one of the largest employers of Veterans; and

WHEREAS, any effort to privatize the USPS, in whole or in part, would undermine the very public mission of the Postal Service, the Universal Service mandate and the dedicated work of hundreds of thousands of public servants; and

WHEREAS, while communication habits are always changing, the USPS remains a vital source of communications, the exchange of ideas, financial transactions, private and secure correspondence, mail-order medications, mail-in voting and e-commerce packages, and a host of opportunities for new and expanded services; and

WHEREAS, the United States Postal Service is owned by the people and is a wonderful national treasure encapsulating the best of government "of, by and for the people."

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby goes on record in support of the public mission of the USPS contained in the 1970 Postal Reorganization Act which says: "The United States Postal Service shall be operated as a basic and fundamental service provided to the people by the Government of the United States, authorized by the Constitution, created by Act of Congress and supported by the people. The Postal Service shall have as its basic function the obligation to bind the Nation together...".

BE IT FURTHER RESOLVED, that this body appreciates the role of the U.S. Postal Service on its 250th Anniversary, salutes the hard-working postal workers from all walks of life who serve the people and business community, and supports a robust and thriving public Postal Service for generations to come!

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

Presiding Officer of the Commission **Date**

County Clerk **Date**

Approved: **County Mayor** **Date**

Vetoed: **County Mayor** **Date**

RLA-18258 **R-26-3-104**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Drucilla Stills, COUNTY COMMISSION
Department:	COUNTY COMMISSION
Requires Expenditure of Funds:	Funded in Current Budget:
Appropriation Required:	

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring and celebrating the life and legacy of former Knox County Commissioner Diane Jordan. **(TO BE ADDED)**

(Commissioners Rawls, Durrett, Oster, Jackson, Hill, Lee, Thompson, Jay and Frazier)

Attachments

Resolution

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, HONORING AND CELEBRATING THE LIFE AND LEGACY OF FORMER KNOX COUNTY COMMISSIONER DIANE JORDAN.

RESOLUTION: **R-26-3-104**

REQUESTED BY: **COMMISSIONERS RAWLS, DURRETT, JACKSON, OSTER, HILL, LEE, THOMPSON, JAY AND FRAZIER**

PREPARED BY: **COMMISSIONER RAWLS**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Diane Jordan was a distinguished public servant, and dedicated community advocate whose career had been marked by integrity, perseverance, and an unwavering commitment to the citizens of Knox County; and

WHEREAS, Diane Jordan served four terms on the Knox County Commission from 1994 to 2007, providing steady leadership and principled governance during a significant period of growth and transition for the county; and

WHEREAS, Commissioner Jordan made history as the first Black woman elected to serve on the Knox County Commission, breaking barriers and paving the way for future generations of leaders. Throughout her tenure, she was widely regarded as a great stateswoman—respected for her thoughtful leadership, collaborative spirit, and steadfast commitment to fairness and accountability in public service; and

WHEREAS, Commissioner Jordan championed responsible stewardship of taxpayer resources while advocating for policies that strengthened neighborhoods, supported economic opportunity, and enhanced quality of life for all residents; and

WHEREAS, known for her accessibility, grace under pressure, and willingness to listen, Commissioner Jordan worked diligently to represent her constituents with professionalism and care. Her leadership reflected both courage and conviction, and she consistently sought common ground in service to the broader community; and

WHEREAS, beyond her years in office, Diane Jordan's legacy continues to inspire. Her groundbreaking service, commitment to equity, and dedication to Knox County have left an enduring mark on the community and stand as a testament to the power of principled public leadership.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Commission of Knox County, Tennessee hereby recognizes and honors the extraordinary life of Diane Jordan, her commitment to public service, community development, and the empowerment of individuals.

BE IT FURTHER RESOLVED, that this Resolution be presented to the family of Diane Jordan and, in so doing, express the Commission's sincere and heartfelt condolences upon the occasion of her passing.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

RLA-18274 **R-26-3-105**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COUNTY COMMISSION

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, honoring the members of the Class of 2026 Junior Commission Civics Education Program upon their program completion. **(TO BE ADDED)**

(Full Commission)

Attachments

Resolution

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, HONORING THE MEMBERS OF THE CLASS OF 2026 JUNIOR COMMISSION CIVICS EDUCATION PROGRAM UPON THEIR PROGRAM COMPLETION.

RESOLUTION: R-26-3-105

REQUESTED BY: FULL COMMISSION

PREPARED BY: KNOX COUNTY LAW DIRECTOR'S OFFICE

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, the Knox County Commission established a Junior Commissioner program in November 2022 to promote community engagement and civic education within Knox County students; and

WHEREAS, this unique leadership program actively involved Knox County youth in understanding their local government and has ultimately led to a more engaged and informed citizenry; and

WHEREAS, this annual youth civics program was provided to the public and open to junior or senior students enrolled full-time in a public, private or accredited home school program; and

WHEREAS, participating in this youth leadership program provided experiential learning of the functions of government, demonstrated healthy citizenry habits, and promoted public awareness of the strengths and abilities of Knox County youth; and

WHEREAS, the students who participated in the Junior Commissioner civic leadership program have become more engaged citizens who will no doubt emerge as community leaders promoting liberty, democracy and the virtues of a healthy republic; and

WHEREAS, it has been verified that the Class of 2026 participants have completed all the requirements of the program and are hereby recognized as Junior Commissioner graduates.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

It is hereby recognized that Vanae' Brown (Senior, Austin-East High School), Jordan Partain (Junior, West High School), Taylor Cash (Junior, Bearden High School), Henry Casey (Senior, West High School), Rebecca Pack (Senior, Farragut High School), Willie Martinez (Junior, L&N STEM Academy), Brooke Bradley (Junior, Powell High School), Oriana Hall (Junior, Career Magnet Academy), Camden Browning (Junior, South -Doyle High School), Tahj Bowers (Junior, Webb School of Knoxville), and Bridget Hoppenrath (Junior, West High School) have graduated from the fourth annual Junior Commission program and are now charged with promoting civic engagement and sharing the importance of local government amongst their peers.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

RLA-18255 **40.**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COUNTY COMMISSION

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Presentation: Rural Metro. **(TO BE ADDED)**

(Commissioner Oster)

Attachments

No file(s) attached.

RLA-18129 **41.**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Sandi Prichard, ENGINEERING AND PUBLIC WORKS
Department:	ENGINEERING AND PUBLIC WORKS
Requires Expenditure of Funds:	NO Funded in Current Budget: NO
Appropriation Required:	NO

Information

CAPTION

Consideration of the Acceptance of New County Roads:

A) Eclipse Lane located in The Ridge at Neals Landing Unit 1, District 8.
B) Illumination Lane located in The Ridge at Neals Landing Units 1 & 2, District 8.
C) Limelight Lane located in The Ridge at Neals Landing Unit 1, District 8.
D) Neals Landing Road located in The Ridge at Neals Landing Unit 2, District 8.
E) Limelight Lane located in The Ridge at Neals Landing Unit 3, District 8.
F) Vista View Lane located in The Ridge at Neals Landing Unit 3, District 8.
(Engineering and Public Works)

Attachments

The Ridge at Neals Landing Units 1 & 2
The Ridge at Neals Landing Unit 3

Knox County Tennessee Road Acceptance

Name of Subdivision: The Ridge at Neals Landing Units 1 & 2
Developer: Eagle Bend Development
Commission District: 8
Inspector: Cody Parker
Date: February 9, 2026

Name of Road	Length of Road	Resurfacing w/Profile Mill Included in Cost
Eclipse Lane	1,306 LF	$ 50,445.56
Illumination Lane	945 LF	$ 36,501.57
Limelight Lane	282 LF	$10,892.53
Neals Landing Road	1,046 LF	$40,402.80
	Total Miles 0.68	Total $138,242.46

Knox County Engineering is recommending the acceptance of the right-of-way along the above streets as shown on the recorded plat instrument number 202303170050354.

New Road Checklist:

Name of Subdivision: The Ridge at Neals Landing Units 1 & 2
Inspector: Jason Horner
Date Surfaced: January 26, 2023

- Curbs are backfilled
- Correct signs have been installed per the MUTCD manual
  - Street signs
  - Stop signs
  - Speed limits signs
  - Children at play signs
  - No Outlet signs if applicable
  - Street is free of standing water
- Sidewalks are located within the ROW
- Bridge(s) spanning 20' or more located within this road section

If yes, provide a brief description:

_____

_____

EPW file # 119-041
Recommended for road acceptance: Yes

Land Development Construction Inspector — Date: 2-9-2026

Construction Services Supervisor — Date: 2-9-2026

TOTAL AREA
15.85 Acres
690,528 sq. ft.
INCLUDES CONNER, HOLE AND R.O.W.
TOTAL LOTS = 43

Zoning
Zoning Shown on Official Map: PR (1-6 DU/AC & 12 DU/AC)
Date: 3/16/23
By:

Addressing Department Certification
I, the undersigned, hereby certify that the subdivision name and all street names conform to the Knoxville/Knox County Street Naming and Addressing Ordinance, the Administrative Rules of the Planning Commission, and these regulations.
Signed:
Date: 3/16/2023

Taxes and Assessments
This is to certify that all property taxes and assessments due on this property have been paid.
City Tax Clerk: Signed:
Date
Knox County Trustee: Signed: MARTIN BAMEY
Date: Mar 8, 2023

Knox County Department of Engineering and Public Works
The Knox County Department of Engineering and Public Works hereby approves this plat on this the ____ day of 20____
Engineering Director: Mar 16, 2023

County - Release of Easements
Except as noted or shown on this plat, the following parties hereby consent to the release of all rights that may have accrued for their use and benefit in the utility and drainage easements along the original lot lines eliminated by this plat.
The following parties do not release any rights that may have accrued for their use and benefit where there are existing facilities within the previously established easement, whether or not shown on this plat. Any relocation of existing facilities will be made at the property owner's expense. If the facilities are relocated, the easement rights will be released.
Knox County Department of Engineering and Public Works
Signed: Date: Mar 16, 2023
Water: (KUB)
Signed: Date: Mar 9, 2023
Sewer: (KUB)
Signed: Date: Mar 9, 2023
Electric: (KUB)
Signed: Date: Mar 9, 2023
Gas: (KUB)
Signed: Date: Mar 9, 2023
Telephone: (AT&T)
Signed: Date: Mar 8, 2023
Cable Television: (COMCAST)
Signed: Date: Mar 16, 2023

Planning Staff Certification of Approval for Recording – Final Plat
This is to certify that the subdivision plat shown hereon has been found to comply with the Subdivision Regulations of Knoxville and Knox County and with existing official plans, with the exception of any variances and waivers noted on this plat, and that the record plat is hereby approved for recording in the office of the Knox County Register of Deeds. Pursuant to Section 13-3-405 of Tennessee Code, Annotated the approval of this plat by the Planning Commission shall not be deemed to constitute or effect an acceptance by the City of Knoxville or Knox County of the dedication of any street or other ground upon the plat.
Signed:
Date: 3/16/2023 EK

Certification of Approval of Public Sanitary Sewer System - Major Subdivisions
This is to certify that the public sanitary sewer system installed, or proposed for installation, is in accordance with State and local regulations.
KUB
Utility Provider
Date: Mar 9, 2023
Authorized Signature for Utility

Certification of Approval of Public Water System - Major Subdivisions
This is to certify that the public water system installed, or proposed for installation, is in accordance with State and local regulations.
KUB
Utility Provider
Date: Mar 9, 2023
Authorized Signature for Utility

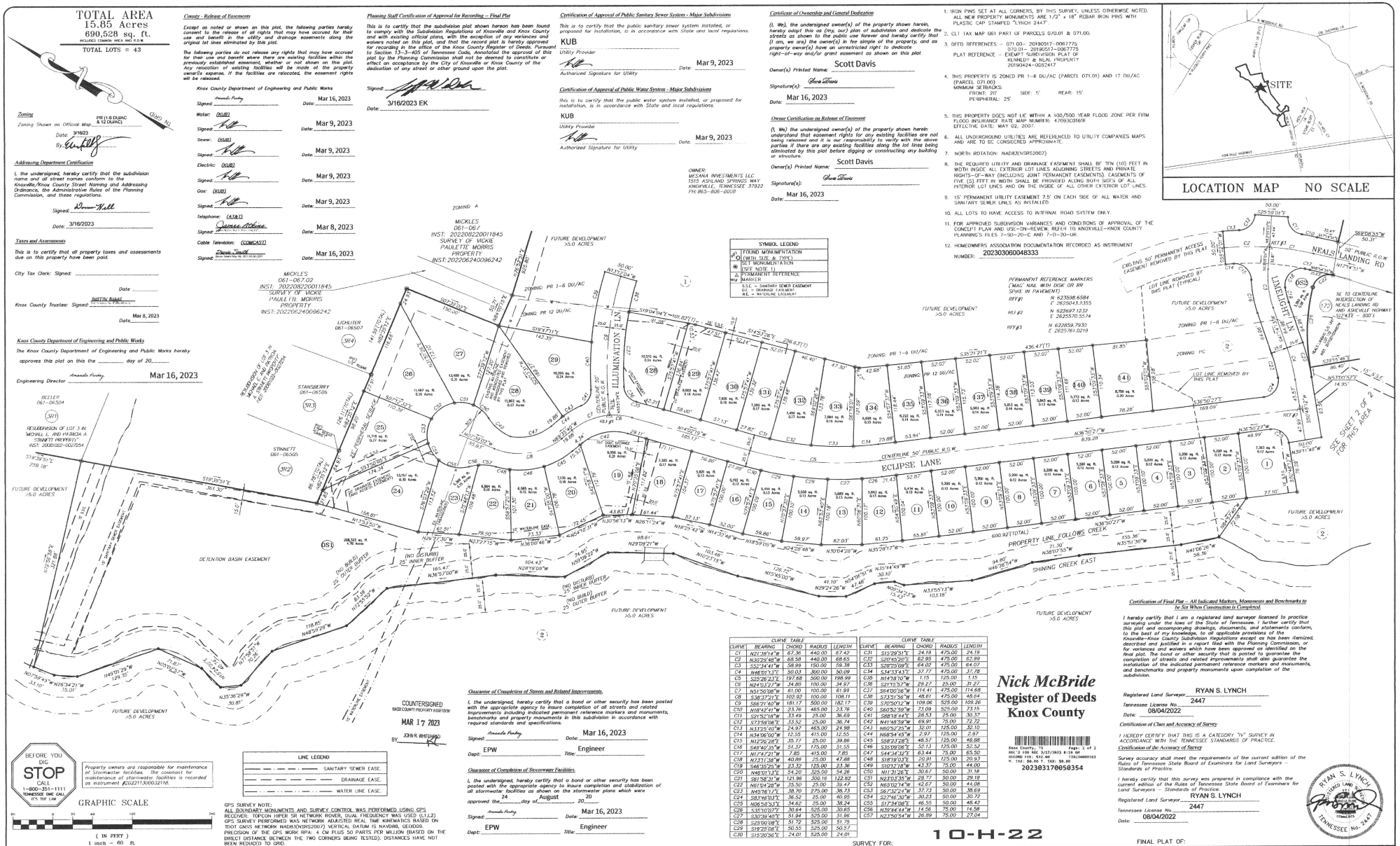
OWNER:
MESANA INVESTMENTS LLC
1515 ASHLAND SPRINGS WAY
KNOXVILLE, TENNESSEE 37922
PH: 865-806-8008

Certificate of Ownership and General Dedication
(I, We), the undersigned owner(s) of the property shown herein, hereby adopt this as (my, our) plan of subdivision and dedicate the streets as shown to the public use forever and hereby certify that (I am, we are) the owner(s) in fee simple of the property, and as property owner(s) have an unrestricted right to dedicate right-of-way and/or grant easement as shown on this plat
Owner(s) Printed Name: Scott Davis
Signature(s):
Date: Mar 16, 2023

Owner Certification on Release of Easement
(I, We) the undersigned owner(s) of the property shown herein understand that easement rights for any existing facilities are not being released and it is our responsibility to verify with the above parties if there are any existing facilities along the lot lines being eliminated by this plat before digging or constructing any building or structure.
Owner(s) Printed Name: Scott Davis
Signature(s):
Date: Mar 16, 2023

1. IRON PINS SET AT ALL CORNERS, BY THIS SURVEY, UNLESS OTHERWISE NOTED. ALL NEW PROPERTY MONUMENTS ARE 1/2" x 18" REBAR IRON PINS WITH PLASTIC CAP STAMPED "LYNCH 2447".
2. CLT TAX MAP 061 PART OF PARCELS 070.01 & 071.00.
3. DEED REFERENCES – 071.00– 20190517–0067775; 070.01– 20190517–0067775
PLAT REFERENCE – EXEMPT SUBDIVISION PLAT OF KENNEDY & NEAL PROPERTY 20190424–0052417
4. THIS PROPERTY IS ZONED PR 1–6 DU/AC (PARCEL 071.01) AND 12 DU/AC (PARCEL 071.00)
MINIMUM SETBACKS:
FRONT: 20' SIDE: 5' REAR: 15'
PERIPHERAL: 25'
5. THIS PROPERTY DOES NOT LIE WITHIN A 100/500 YEAR FLOOD ZONE PER FIRM FLOOD INSURANCE RATE MAP NUMBER: 47093C0169F
EFFECTIVE DATE: MAY 02, 2007.
6. ALL UNDERGROUND UTILITIES ARE REFERENCED TO UTILITY COMPANIES MAPS AND ARE TO BE CONSIDERED APPROXIMATE.
7. NORTH ROTATION: NAD83(NSRS2007)
8. THE REQUIRED UTILITY AND DRAINAGE EASEMENT SHALL BE TEN (10) FEET IN WIDTH INSIDE ALL EXTERIOR LOT LINES ADJOINING STREETS AND PRIVATE RIGHTS–OF–WAY (INCLUDING JOINT PERMANENT EASEMENTS). EASEMENTS OF FIVE (5) FEET IN WIDTH SHALL BE PROVIDED ALONG BOTH SIDES OF ALL INTERIOR LOT LINES AND ON THE INSIDE OF ALL OTHER EXTERIOR LOT LINES.
9. 15' PERMANENT UTILITY EASEMENT 7.5' ON EACH SIDE OF ALL WATER AND SANITARY SEWER LINES AS INSTALLED.
10. ALL LOTS TO HAVE ACCESS TO INTERNAL ROAD SYSTEM ONLY.
11. FOR APPROVED SUBDIVISION VARIANCES AND CONDITIONS OF APPROVAL OF THE CONCEPT PLAN AND USE–ON–REVIEW, REFER TO KNOXVILLE–KNOX COUNTY PLANNING'S FILES 7–SD–20–C AND 7–D–20–UR.
12. HOMEOWNERS ASSOCIATION DOCUMENTATION RECORDED AS INSTRUMENT NUMBER: 202303060048333

LOCATION MAP NO SCALE


ZONING: A
MICKLES 061–067.02 INST: 20220822 0011845 SURVEY OF VICKIE PAULETTE MORRIS PROPERTY INST: 20220624 0096242
ZONING: PR 1–6 DU/AC
ZONING: PR 12 DU/AC
FUTURE DEVELOPMENT >5.0 ACRES
ILLUMINATION LN
ECLIPSE LANE
CENTERLINE 50' PUBLIC R/O/W
LIMELIGHT LN
NEALS LANDING RD
50' PUBLIC R/O/W
SHINING CREEK EAST
PROPERTY LINE FOLLOWS CREEK
DETENTION BASIN EASEMENT
EXISTING 50' PERMANENT ACCESS EASEMENT REMOVED BY THIS PLAT
LOT LINE REMOVED BY THIS PLAT (TYPICAL)
LOT LINE REMOVED BY THIS PLAT
PERMANENT REFERENCE MARKERS ("MAG" NAIL WITH DISK OR PK SPIKE IN PAVEMENT)
REF#1 N 623598.6584 E 2625043.9355
REF#2 N 622697.1232 E 2625570.5574
REF#3 N 622859.7930 E 2625761.0219
TIE TO CENTERLINE INTERSECTION OF NEALS LANDING RD AND ASHEVILLE HIGHWAY S12ºE – 3021'
SEE SHEET 2 OF 2 FOR THIS AREA
RESUBDIVISION OF LOT 3 IN MCNALL LL AND HARBIA A STINNETT PROPERTY INST: 20081022–0027254
STINNETT 061–06505
STANSBERRY 061–06506
BELLER 061–06504
LIGHLITER 061–06507
FUTURE DEVELOPMENT >5.0 ACRES
(NO DISTURB) 25' INNER BUFFER
25' OUTER BUFFER
NO BUILD ZONE
(NO DISTURB) 25' INNER BUFFER
25' OUTER BUFFER
NO BUILD ZONE
FUTURE DEVELOPMENT >5.0 ACRES
FUTURE DEVELOPMENT >5.0 ACRES
FUTURE DEVELOPMENT >5.0 ACRES

TOTAL AREA
15.85 Acres
690,528 sq. ft.
INCLUDES COMMON AREA AND R.O.W.

TOTAL LOTS = 43

TN GRID

Zoning

Zoning Shown on Official Map PR (1-6 DUAC & 12 DUAC)

Date: 3/16/23

By: [signature]

Addressing Department Certification

I, the undersigned, hereby certify that the subdivision name and all street names conform to the Knoxville/Knox County Street Naming and Addressing Ordinance, the Administrative Rules of the Planning Commission, and these regulations.

Signed: [signature]

Date: 3/16/2023

Taxes and Assessments

This is to certify that all property taxes and assessments due on this property have been paid.

City Tax Clerk: Signed: ______________

Date ______

Knox County Trustee: Signed: JUSTIN BIGGS

Date Mar 8, 2023

Knox County Department of Engineering and Public Works

The Knox County Department of Engineering and Public Works hereby approves this plat on this the ______ day of 20____

Engineering Director [signature] Mar 16, 2023

BEELER
061-06504

County - Release of Easements

Except as noted or shown on this plat, the following parties hereby consent to the release of all rights that may have accrued for their use and benefit in the utility and drainage easements along the original lot lines eliminated by this plat.

The following parties do not release any rights that may have accrued for their use and benefit where there are existing facilities within the previously established easement, whether or not shown on this plat. Any relocation of existing facilities will be made at the property owner/s expense. If the facilities are relocated, the easement rights will be released.

Knox County Department of Engineering and Public Works

Signed: [signature] Date: Mar 16, 2023

Water: (KUB)

Signed: [signature] Date: Mar 9, 2023

Sewer: (KUB)

Signed: [signature] Date: Mar 9, 2023

Electric: (KUB)

Signed: [signature] Date: Mar 9, 2023

Gas: (KUB)

Signed: [signature] Date: Mar 9, 2023

Telephone: (AT&T)

Signed: [signature] Date: Mar 8, 2023

Cable Television: (COMCAST)

Signed: [signature] Date: Mar 16, 2023

Planning Staff Certification of Approval for Recording -- Final Plat

This is to certify that the subdivision plat shown hereon has been found to comply with the Subdivision Regulations of Knoxville and Knox County and with existing official plans, with the exception of any variances and waivers noted on this plat, and that the record plat is hereby approved for recording in the office of the Knox County Register of Deeds. Pursuant to Section 13-3-405 of Tennessee Code, Annotated the approval of this plat by the Planning Commission shall not be deemed to constitute or effect an acceptance by the City of Knoxville or Knox County of the dedication of any street or other ground upon the plat.

Signed: [signature]

Date: 3/16/2023 EK

Certification of Approval of Public Sanitary Sewer System - Major Subdivisions

This is to certify that the public sanitary sewer system installed, or proposed for installation, is in accordance with State and local regulations.

KUB
Utility Provider

[signature] Date: Mar 9, 2023
Authorized Signature for Utility

Certification of Approval of Public Water System - Major Subdivisions

This is to certify that the public water system installed, or proposed for installation, is in accordance with State and local regulations.

KUB
Utility Provider

[signature] Date: Mar 9, 2023
Authorized Signature for Utility

OWNER:
MESANA INVESTMENTS LLC
1515 ASHLAND SPRINGS WAY
KNOXVILLE, TENNESSEE 37922
PH: 865-806-8008

Certificate of Ownership and General Dedication

(I, We), the undersigned owner(s) of the property shown herein, hereby adopt this as (my, our) plan of subdivision and dedicate the streets as shown to the public use forever and hereby certify that (I am, we are) the owner(s) in fee simple of the property, and as property owner(s) have an unrestricted right to dedicate right-of-way and/or grant easement as shown on this plat

Owner(s) Printed Name: Scott Davis

Signature(s): [signature]

Date: Mar 16, 2023

Owner Certification on Release of Easement

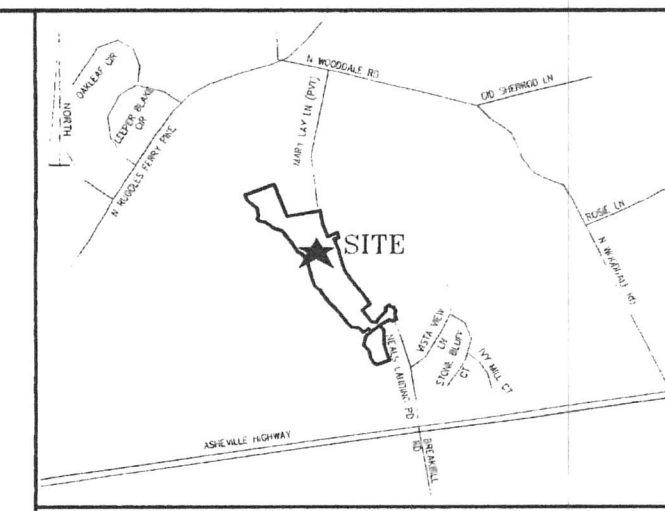
(I, We) the undersigned owner(s) of the property shown herein understand that easement rights for any existing facilities are not being released and it is our responsibility to verify with the above parties if there are any existing facilities along the lot lines being eliminated by this plat before digging or constructing any building or structure.

Owner(s) Printed Name: Scott Davis

Signature(s): [signature]

Date: Mar 16, 2023

1. IRON PINS SET AT ALL CORNERS, BY THIS SURVEY, UNLESS OTHERWISE NOTED ALL NEW PROPERTY MONUMENTS ARE 1/2" x 18" REBAR IRON PINS WITH PLASTIC CAP STAMPED "LYNCH 2447".
2. CLT TAX MAP 061 PART OF PARCELS 070.01 & 071.00.
3. DEED REFERENCES – 071.00– 20190517–0067775
   070.01– 20190517–0067775
   PLAT REFERENCE – EXEMPT SUBDIVISION PLAT OF KENNEDY & NEAL PROPERTY 20190424–0062417
4. THIS PROPERTY IS ZONED PR 1-6 DU/AC (PARCEL 071.01) AND 12 DU/AC (PARCEL 071.00)
   MINIMUM SETBACKS:
   FRONT: 20' SIDE: 5' REAR: 15'
   PERIPHERAL: 25'
5. THIS PROPERTY DOES NOT LIE WITHIN A 100/500 YEAR FLOOD ZONE PER FIRM FLOOD INSURANCE RATE MAP NUMBER: 47093C0169F EFFECTIVE DATE: MAY 02, 2007.
6. ALL UNDERGROUND UTILITIES ARE REFERENCED TO UTILITY COMPANIES MAPS AND ARE TO BE CONSIDERED APPROXIMATE.
7. NORTH ROTATION: NAD83(NSRS2007)
8. THE REQUIRED UTILITY AND DRAINAGE EASEMENT SHALL BE TEN (10) FEET IN WIDTH INSIDE ALL EXTERIOR LOT LINES ADJOINING STREETS AND PRIVATE RIGHTS-OF-WAY (INCLUDING JOINT PERMANENT EASEMENTS). EASEMENTS OF FIVE (5) FEET IN WIDTH SHALL BE PROVIDED ALONG BOTH SIDES OF ALL INTERIOR LOT LINES AND ON THE INSIDE OF ALL OTHER EXTERIOR LOT LINES.
9. 15' PERMANENT UTILITY EASEMENT 7.5' ON EACH SIDE OF ALL WATER AND SANITARY SEWER LINES AS INSTALLED.
10. ALL LOTS TO HAVE ACCESS TO INTERNAL ROAD SYSTEM ONLY.
11. FOR APPROVED SUBDIVISION VARIANCES AND CONDITIONS OF APPROVAL OF THE CONCEPT PLAN AND USE-ON-REVIEW, REFER TO KNOXVILLE-KNOX COUNTY PLANNING'S FILES 7-SD-20-C AND 7-D-20-UR.
12. HOMEOWNERS ASSOCIATION DOCUMENTATION RECORDED AS INSTRUMENT NUMBER: 202303060048333



LOCATION MAP NO SCALE

LINE LEGEND	
— · — · —	SANITARY SEWER EASE.
— — — —	DRAINAGE EASE.
— · · — · · —	WATER LINE EASE.

SYMBOL LEGEND	
○	FOUND MONUMENTATION (WITH SIZE & TYPE)
◉	SET MONUMENTATION (SEE NOTE 1)
△ REF#1	PERMANENT REFERENCE MARKER

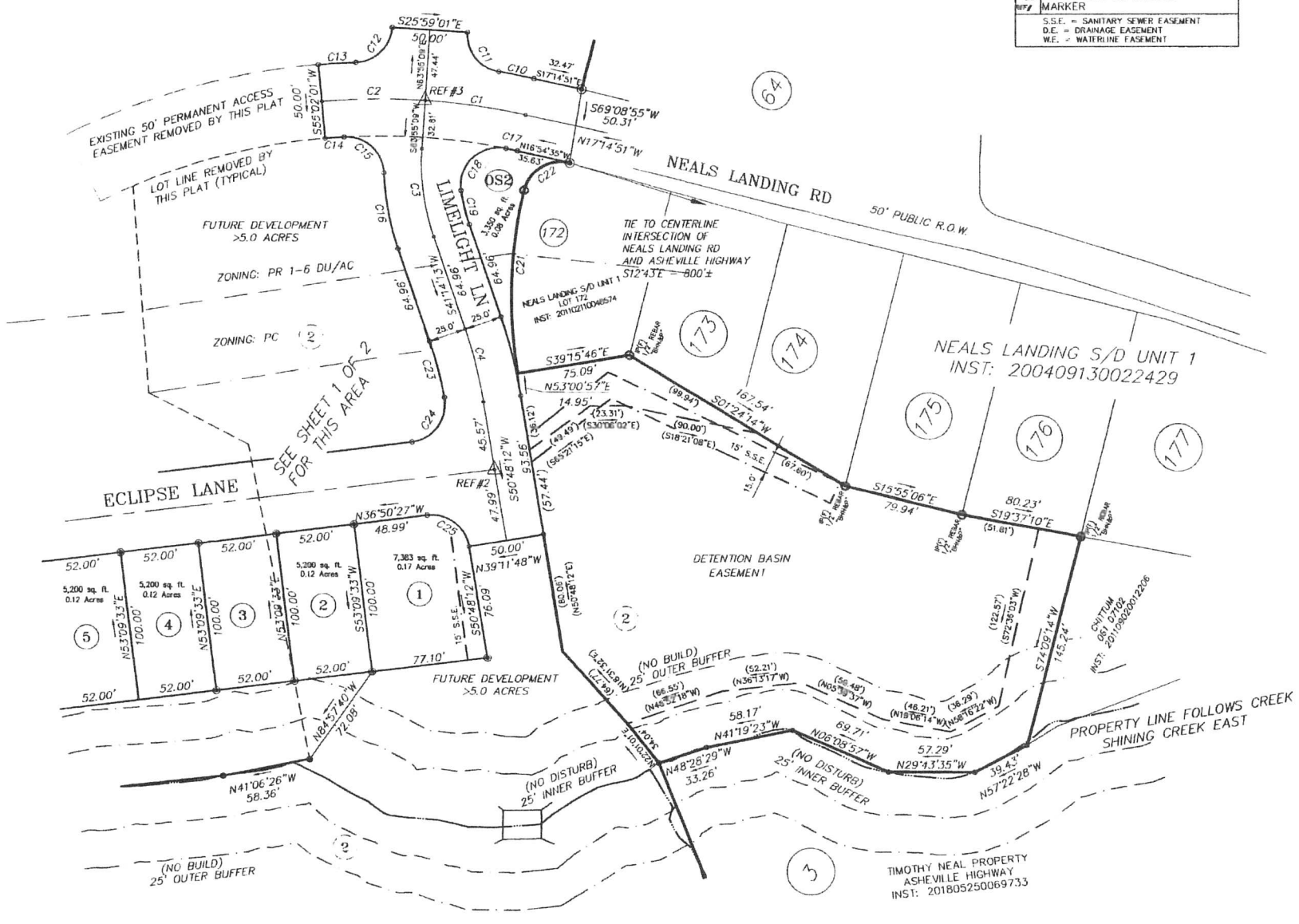
S.S.E. = SANITARY SEWER EASEMENT
D.E. = DRAINAGE EASEMENT
W.E. = WATERLINE EASEMENT

PERMANENT REFERENCE MARKERS
('MAG' NAIL WITH DISK OR RR SPIKE IN PAVEMENT)

REF#1 N 623598.6584 E 2625043.2355

REF#2 N 622697.1232 E 2625570.5574

FUTURE DEVELOPMENT >5.0 ACRES



CURVE	BEARING	CHORD	RADIUS	LENGTH
C1	N21°38'14"W	67.36	440.00	67.42
C2	N30°29'48"W	68.58	440.00	68.65
C3	S52°34'41"W	58.99	150.00	59.38
C4	N46°01'13"E	50.03	300.00	50.09
C5	S25°26'23"E	197.68	500.00	198.99
C6	N24°03'27"W	34.80	100.00	34.97
C7	N51°50'08"W	61.00	100.00	61.99
C8	S38°37'21"E	102.92	100.00	108.11
C9	S66°21'40"W	181.17	500.00	182.17
C10	N18°42'41"W	23.76	465.00	23.76
C11	S21°52'18"W	33.49	25.00	36.69
C12	S73°59'06"E	33.52	25.00	36.74
C13	N33°25'40"W	24.97	465.00	24.98
C14	N34°06'00"W	12.55	415.00	12.55
C15	N12°26'28"E	35.77	25.00	39.86
C16	S49°40'35"W	51.37	175.00	51.55
C17	N17°47'21"W	7.85	415.00	7.85
C18	N73°11'38"W	40.89	25.00	47.88
C19	S46°35'25"W	23.32	125.00	23.36
C20	N46°01'13"E	54.20	325.00	54.26
C21	S61°58'31"W	121.96	300.16	122.82
C22	N61°04'28"W	35.50	25.00	39.47
C23	N45°16'17"E	38.70	275.00	38.73
C24	S83°46'03"E	36.52	25.00	40.95
C25	N06°58'53"E	34.62	25.00	38.24
C26	S35°10'07"E	30.64	525.00	30.65
C27	S30°39'40"E	51.94	525.00	51.96
C28	S25°00'08"E	51.72	525.00	51.75
C29	S19°25'08"E	50.55	525.00	50.57
C30	S15°20'56"E	24.01	525.00	24.01

CURVE	BEARING	CHORD	RADIUS	LENGTH
C31	S15°29'51"E	24.19	475.00	24.19
C32	S20°45'20"E	62.95	475.00	62.99
C33	S28°25'09"E	64.02	475.00	64.07
C34	S34°33'43"E	37.77	475.00	37.78
C35	N14°18'10"W	1.15	125.00	1.15
C36	S21°15'57"W	29.27	25.00	31.27
C37	S64°00'56"W	114.41	475.00	114.68
C38	S73°51'56"W	48.61	475.00	48.64
C39	S70°50'12"W	109.06	525.00	109.26
C40	S60°52'59"W	73.09	525.00	73.15
C41	S88°18'44"E	28.53	25.00	30.37
C42	N41°48'59"W	69.91	75.00	72.72
C43	N60°52'25"W	32.01	125.00	32.10
C44	N68°54'45"W	2.97	125.00	2.97
C45	S58°23'28"E	48.57	125.00	48.88
C46	S35°09'06"E	52.13	125.00	52.52
C47	S44°34'32"E	63.44	75.00	65.50
C48	S18°19'03"E	20.91	125.00	20.93
C49	S10°12'18"W	43.37	75.00	44.00
C50	N11°31'26"E	30.67	50.00	31.18
C51	N23°03'35"W	28.77	50.00	29.18
C52	N65°02'14"W	42.67	50.00	44.08
C53	S67°32'24"W	37.73	50.00	38.69
C54	S27°46'30"W	30.23	50.00	30.72
C55	S17°34'08"E	46.55	50.00	48.42
C56	N39°44'44"W	14.56	75.00	14.58
C57	N23°50'54"W	26.89	75.00	27.04

BEFORE YOU DIG STOP CALL 1-800-351-1111 TENNESSEE ONE CALL IT'S THE LAW

Property owners are responsible for maintenance of Stormwater facilities. The covenant for maintenance of stormwater facilities is recorded as instrument #202211300032118.

GRAPHIC SCALE
0 30 60 120 240
(IN FEET)
1 inch = 60 ft.

COUNTERSIGNED
KNOX COUNTY PROPERTY ASSESSOR
MAR 17 2023
BY JOHN R. WHITEHEAD

GPS SURVEY NOTE:
ALL BOUNDARY MONUMENTS AND SURVEY CONTROL WAS PERFORMED USING GPS
RECEIVER: TOPCON HIPER SR NETWORK ROVER, DUAL FREQUENCY WAS USED (L1,L2)
GPS SURVEY PERFORMED WAS NETWORK ADJUSTED REAL TIME KINEMATICS BASED ON TDOT GNSS NETWORK NAD83(NSRS2007) VERTICAL DATUM IS NAVD88, GEOID09.
PRECISION OF THE GPS WORK RPA: 4 CM PLUS 50 PARTS PER MILLION (BASED ON THE DIRECT DISTANCE BETWEEN THE TWO CORNERS BEING TESTED). DISTANCES HAVE NOT BEEN REDUCED TO GRID.

Guarantee of Completion of Streets and Related Improvements.

I, the undersigned, hereby certify that a bond or other security has been posted with the appropriate agency to insure completion of all streets and related improvements including indicated permanent reference markers and monuments, benchmarks and property monuments in this subdivision in accordance with required standards and specifications.

Signed: [signature] Date: Mar 16, 2023

Dept: EPW Title: Engineer

Guarantee of Completion of Stormwater Facilities.

I, the undersigned, hereby certify that a bond or other security has been posted with the appropriate agency to insure completion and stabilization of all stormwater facilities as shown on the stormwater plans which were approved the 24 day of August, 20 20

Signed: [signature] Date: Mar 16, 2023

Dept: EPW Title: Engineer

Certification of Final Plat -- All Indicated Markers, Monuments and Benchmarks to be Set When Construction is Completed.

I hereby certify that I am a registered land surveyor licensed to practice surveying under the laws of the State of Tennessee. I further certify that this plat and accompanying drawings, documents, and statements conform, to the best of my knowledge, to all applicable provisions of the Knoxville-Knox County Subdivision Regulations except as has been itemized, described and justified in a report filed with the Planning Commission, or for variances and waivers which have been approved as identified on the final plat. The bond or other security that is posted to guarantee the completion of streets and related improvements shall also guarantee the installation of the indicated permanent reference markers and monuments, and benchmarks and property monuments upon completion of the subdivision.

Registered Land Surveyor RYAN S. LYNCH

Tennessee License No. 2447

Date: 08/04/2022

Certification of Class and Accuracy of Survey

I HEREBY CERTIFY THAT THIS IS A CATEGORY "IV" SURVEY IN ACCORDANCE WITH THE TENNESSEE STANDARDS OF PRACTICE.

Certification of the Accuracy of Survey

Survey accuracy shall meet the requirements of the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors – Standards of Practice.

I hereby certify that this survey was prepared in compliance with the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors – Standards of Practice.

Registered Land Surveyor RYAN S. LYNCH

Tennessee License No. 2447

Date: 08/04/2022

RYAN S. LYNCH REGISTERED LAND SURVEYOR TENNESSEE No. 2447

10-H-22

SURVEY FOR: FINAL PLAT OF:

LYNCH SURVEYS LLC
SUBDIVISIONS | AS-BUILTS | SITE DESIGN
4405 COSTER RD. KNOXVILLE, TENN. 37912
865-584-2630 FAX: 865-584-2801 WWW.LYNCHSURVEY.COM

		REVISIONS
DRAWN BY: M.STRANGE	1	12/07/2022 PLANNING COMMENTS
CHECKED BY: R. LYNCH	2	01/17/2023 PLANNING COMMENTS
APPROVED BY: R.S.L.	3	
SCALE: 1"=60'	4	
DATE: 08/04/2022	5	
	6	

Eagle Bend Development
1920 Ebenezer Road
Knoxville, Tennessee 37922
Phone: (865) 693-3356

THE RIDGE AT NEALS LANDING – UNIT 1
Lots 1-29 and 128-141
Knoxville, Tennessee
District 8, Knox County, Tennessee

SHEET NO. 2 of 2
PROJECT NO. 4143

TOTAL AREA
20.77 Acres
904,592 sq. ft.
INCLUDES FUTURE DEVELOPMENT AND R.O.W.

TOTAL BUILDING LOTS = 55

TN GRID

Zoning

Zoning Shown on Official Map: PR 1-6 DU/AC, PR 12 DU/AC, PC

Date: 7/16/2024

By: Spenca Schmidt

Addressing Department Certification

I, the undersigned, hereby certify that the subdivision name and all street names conform to the Knoxville or Knox County Street Naming and Addressing Ordinance, the Addressing Guidelines and Procedures, and these regulations.

Signed: David M. Hobbs

Date: 07/16/2024

Taxes and Assessments

This is to certify that all property taxes and assessments due on this property have been paid.

City Tax Clerk: Signed: ____________ Date ______

Knox County Trustee: Signed: justin biggs Date Jul 8, 2024

Knox County Department of Engineering and Public Works

The Knox County Department of Engineering and Public Works hereby approves this plat on this the ______ day of 20____

Engineering Director: Jim Snowden by Dennis Arrow Jul 16, 2024

Certification of Approval of Public Sanitary Sewer System - Major Subdivisions

I hereby certify that the utility provider was contacted by the developer or owner of the property to determine the status of the public sanitary sewer system and the public sanitary sewer system was installed, or will be installed, in accordance with State and local regulations.

KUB

Utility Provider

Jason Cummings Jul 9, 2024

Authorized Signature for Utility Date

Certification of Approval of Public Water System - Major Subdivisions

I hereby certify that the utility provider was contacted by the developer or owner of the property to determine the status of the public water system and the public water system was installed, or will be installed, in accordance with State and local regulations.

KUB

Utility Provider

Jason Cummings Jul 9, 2024

Authorized Signature for Utility Date

Inspection of Completed Streets and Related Improvements

I, the undersigned, hereby certify this subdivision has been inspected and all streets and related improvements have been completed in a manner that meets all city standards and specifications and have been officially accepted as built by the appropriate official(s).

Signed: Jim Snowden by Dennis Arrow

Date: Jul 16, 2024

Dept: Engineering & Public Works

Title: Director

Guarantee of Completion of Stormwater Facilities

I, the undersigned, hereby certify that a bond or other security has been posted with the appropriate agency to ensure completion and stabilization of all stormwater facilities as shown on the stormwater plans which were approved the 24th day of August, 20 20.

Signed: Jim Snowden by Dennis Arrow Date: Jul 16, 2024

Dept: Engineering & Public Works Title: Director

BEFORE YOU DIG
STOP
CALL 1-800-351-1111
TENNESSEE ONE CALL
IT'S THE LAW

GRAPHIC SCALE
100 0 50 100 200 400
(IN FEET)
1 inch = 100 ft.

Planning Commission Certification of Approval for Recording – Final Plat

This is to certify that the subdivision plat shown hereon has been found to comply with the Subdivision Regulations of Knoxville and Knox County and with existing official plans, with the exception of any variances and waivers noted on this plat and in the minutes of the Knoxville-Knox County Planning Commission, on this the 13th day of June, 20 24, and that the record plat is hereby approved for recording in the office of the Knox County Register of Deeds. Pursuant to Section 13-3-405 of Tennessee Code, Annotated, the approval of this plat by the Planning Commission shall not be deemed to constitute or effect an acceptance by the City of Knoxville or Knox County of the dedication of any street or other ground upon the plat.

Signed: Amy L. Brooks SS

Date: 7/16/2024

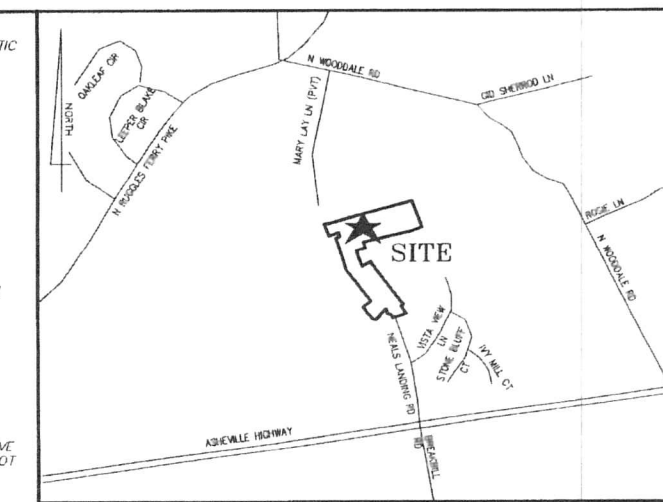
Certificate of Ownership and General Dedication

(I, We), the undersigned owner(s) of the property shown herein, hereby adopt this as (my, our) plan of subdivision and dedicate the streets as shown to the public use forever and hereby certify that (I am, we are) the owner(s) in fee simple of the property, and as property owner(s) have an unrestricted right to dedicate right-of-way and/or grant easement as shown on this plat

Owner(s) Printed Name: Scott Davis Signature(s): Scott Davis

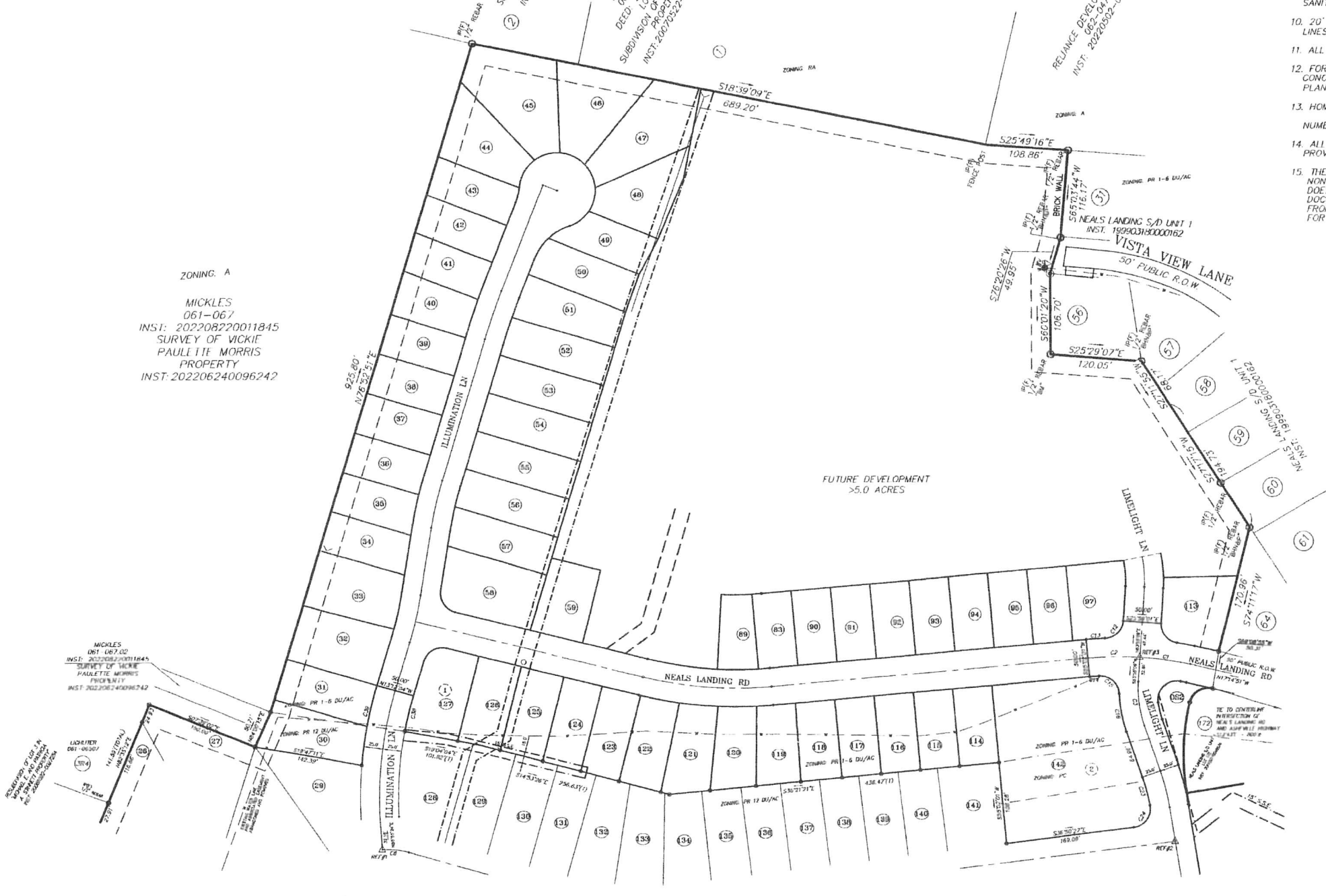
Date: Jul 8, 2024

1. IRON PINS SET AT ALL CORNERS, BY THIS SURVEY, UNLESS OTHERWISE NOTED. ALL NEW PROPERTY MONUMENTS ARE 1/2" x 18" REBAR IRON PINS WITH PLASTIC CAP STAMPED "LYNCH 2447".
2. CLT TAX MAP 061 PART OF PARCELS 070.01.
3. DEED REFERENCES – 070.01– 20190517 0067775 PLAT REFERENCE – EXEMPT SUBDIVISION PLAT OF KENNEDY & NEAL PROPERTY 20190424–0062417
4. THIS PROPERTY IS ZONED PR 1–6 DU/AC (PARCEL 071.01) NOTE LOT 142 IS ZONED PR 1–6 DU/AC, PC AND PR 12 DU/AC MINIMUM SETBACKS: FRONT: 20' SIDE: 5' REAR: 15' PERIPHERAL: 25'
5. THIS PROPERTY DOES NOT LIE WITHIN A 100/500 YEAR FLOOD ZONE PER FIRM FLOOD INSURANCE RATE MAP NUMBER: 47093C0169I EFFECTIVE DATE: MAY 02, 2007.
6. ALL UNDERGROUND UTILITIES ARE REFERENCED TO UTILITY COMPANIES MAPS AND ARE TO BE CONSIDERED APPROXIMATE.
7. NORTH ROTATION: NAD83(NSRS2007)
8. THE REQUIRED UTILITY AND DRAINAGE EASEMENT SHALL BE TEN (10) FEET IN WIDTH INSIDE ALL EXTERIOR LOT LINES ADJOINING STREETS AND PRIVATE RIGHTS–OF–WAY (INCLUDING JOINT PERMANENT EASEMENTS). EASEMENTS OF FIVE (5) FEET IN WIDTH SHALL BE PROVIDED ALONG BOTH SIDES OF ALL INTERIOR LOT LINES AND ON THE INSIDE OF ALL OTHER EXTERIOR LOT LINES.
9. 15' PERMANENT UTILITY EASEMENT 7.5' ON EACH SIDE OF ALL WATER AND SANITARY SEWER LINES AS INSTALLED.
10. 20' PERMANENT DRAINAGE EASEMENT 10' ON EACH SIDE OF ALL STORM WATER LINES AS INSTALLED.
11. ALL LOTS TO HAVE ACCESS TO INTERNAL ROAD SYSTEM ONLY.
12. FOR APPROVED SUBDIVISION VARIANCES AND CONDITIONS OF APPROVAL OF THE CONCEPT PLAN AND USE ON–REVIEW, REFER TO KNOXVILLE–KNOX COUNTY PLANNING'S FILES 7–SD–20–C AND 7–D–20–UR (APPROVED 7/9/2020).
13. HOMEOWNERS ASSOCIATION DOCUMENTATION RECORDED AS INSTRUMENT NUMBER: 202303060048333
14. ALL REQUIRED CERTIFICATIONS AND APPLICABLE NOTES FOR THIS PLAT OR PROVIDED ON SHEET #1.
15. THE APPROVAL OF THIS PLAT DOES NOT INCREASE ANY ZONING NON–CONFORMITIES FOR THE EXISTING STRUCTURES ON THE PROPERTY NOR DOES IT CHANGE THE NON–CONFORMING STATUS OF THE EXISTING STRUCTURES DOCUMENTATION AS TO THE LEGAL STATUS OF THE STRUCTURES OR VARIANCES FROM THE BOARD OF ZONING APPEALS MAY BE REQUIRED AT SOME TIME LATER FOR PERMIT APPLICATIONS OR OTHER DEVELOPMENT APPROVALS.



LOCATION MAP   NO SCALE

Property owners are responsible for maintenance of Stormwater facilities. The covenant for maintenance of stormwater facilities is recorded as instrument #202211300032118 and 202303230051351



LINE LEGEND

— · — · —	SANITARY SEWER EASE.
— — — —	DRAINAGE EASE.
— · · — · · —	WATER LINE EASE.
EXISTING WATER LINE AND ASSOCIATED EASEMENT ABANDONED AND REMOVED BY THIS PLAT	

SYMBOL LEGEND

○	FOUND MONUMENTATION (WITH SIZE & TYPE)
◉	SET MONUMENTATION (SEE NOTE 1)
△	PERMANENT REFERENCE MARKER

S.S.E. = SANITARY SEWER EASEMENT
D.E. = DRAINAGE EASEMENT
W.E. = WATERLINE EASEMENT

GPS SURVEY NOTE:
ALL BOUNDARY MONUMENTS AND SURVEY CONTROL WAS PERFORMED USING GPS
RECEIVER: TOPCON HIPER SR NETWORK ROVER, DUAL FREQUENCY WAS USED (L1,L2)
GPS SURVEY PERFORMED WAS NETWORK ADJUSTED REAL TIME KINEMATICS BASED ON TDOT GNSS NETWORK NAD83(NSRS2007) VERTICAL DATUM IS NAVD88, GEOID09.
PRECISION OF THE GPS WORK RPA: 4 CM PLUS 50 PARTS PER MILLION (BASED ON THE DIRECT DISTANCE BETWEEN THE TWO CORNERS BEING TESTED). DISTANCES HAVE NOT BEEN REDUCED TO GRID.

6-SB-24-F

Nick McBride
Register of Deeds
Knox County

Knox County, TN Page: 1 of 2
REC'D FOR REC 7/17/2024 8:32 AM
RECORD FEE: $32.00 T20240026423
M. TAX: $0.00 T. TAX: $0.00
202407170003048

COUNTERSIGNED
KNOX COUNTY PROPERTY ASSESSOR
JUL 17 2024
BY JOHN J. WHITEHEAD

Certification of Final Plat – All Indicated Markers, Monuments and Benchmarks to be Set When Construction is Completed.

I hereby certify that I am a registered land surveyor licensed to practice surveying under the laws of the State of Tennessee. I further certify that this plat and accompanying drawings, documents, and statements conform, to the best of my knowledge, to all applicable provisions of the Knoxville–Knox County Subdivision Regulations except as has been itemized, described and justified in a report filed with the Planning Commission, or for variances and waivers which have been approved as identified on the final plat. The bond or other security that is posted to guarantee the completion of streets and related improvements shall also guarantee the installation of the indicated permanent reference markers and monuments, and benchmarks and property monuments upon completion of the subdivision.

Registered Land Surveyor RYAN S. LYNCH

Tennessee License No. 2447

Date: 04–23–2024

Certification of Class and Accuracy of Survey

I HEREBY CERTIFY THAT THIS IS A CATEGORY "IV" SURVEY IN ACCORDANCE WITH THE TENNESSEE STANDARDS OF PRACTICE.

Certification of the Accuracy of Survey

Survey accuracy shall meet the requirements of the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors – Standards of Practice.

I hereby certify that this survey was prepared in compliance with the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors – Standards of Practice.

Registered Land Surveyor RYAN S. LYNCH

Tennessee License No. 2447

Date: 04–23–2024

RYAN S. LYNCH REGISTERED LAND SURVEYOR TENNESSEE No. 2447
04/23/2024

LYNCH SURVEYS LLC		SURVEY FOR:	FINAL PLAT OF:	
SUBDIVISIONS | AS-BUILTS | SITE DESIGN 4405 COSTER RD. KNOXVILLE, TENN. 37912 865-584-2630 FAX: 865-584-2801 WWW.LYNCHSURVEY.COM	DRAWN BY: M.STRANGE CHECKED BY: R. LYNCH APPROVED BY: R.S.L. SCALE: 1"=100' DATE: 04/23/2024	Eagle Bend Development 1920 Ebenezer Road Knoxville, Tennessee 37922 Phone: (865) 693-3356	THE RIDGE AT NEALS LANDING – UNIT 2 Lots 30–59, 83, 89–97, 113–127 & 142 Knoxville, Tennessee District 8, Knox County, Tennessee	SHEET NO. 1 of 2 PROJECT NO. 4143

REVISIONS

1	PS COMMENTS 05282024
2	05/30/2024 PS COMMENTS
3	05/31/2024 ps comments
4	
5	
6	

TOTAL AREA
20.77 Acres
904,592 sq. ft.
INCLUDES COMMON AREA, FUTURE DEVELOPMENT AND R.O.W.
TOTAL BUILDING LOTS = 55

Planning Commission Certification of Approval for Recording – Final Plat

This is to certify that the subdivision plat shown hereon has been found to comply with the Subdivision Regulations of Knoxville and Knox County and with existing official plans, with the exception of any variances and waivers noted on this plat and in the minutes of the Knoxville–Knox County Planning Commission, on this the 13th day of June, 20 24, and that the record plat is hereby approved for recording in the office of the Knox County Register of Deeds. Pursuant to Section 13-3-405 of Tennessee Code, Annotated, the approval of this plat by the Planning Commission shall not be deemed to constitute or effect an acceptance by the City of Knoxville or Knox County of the dedication of any street or other ground upon the plat.

Signed: Amy L. Brooks SS
Date: 7/16/2024

Property owners are responsible for maintenance of Stormwater facilities. The covenant for maintenance of stormwater facilities is recorded as instrument #20231130003218 and 20230323051351

PERMANENT REFERENCE MARKERS (MAG NAIL WITH DISK OR RR SPIKE IN PAVEMENT)
REF#1 N 623598.6584 E 2625043.2355
REF#2 N 622697.1232 E 2625570.5574
REF#3 N 622859.7830 E 2626761.0219
REF#4 N 623712.1250 E 2625329.4354

LINE LEGEND
SANITARY SEWER EASE.
DRAINAGE EASE.
WATER LINE EASE.
EXISTING WATER LINE AND ASSOCIATED EASEMENT ABANDONED AND REMOVED BY THIS PLAT

SYMBOL LEGEND
FOUND MONUMENTATION (WITH SIZE & TYPE)
SET MONUMENTATION (SEE NOTE 1)
PERMANENT REFERENCE MARKER
S.S.E. = SANITARY SEWER EASEMENT
D.E. = DRAINAGE EASEMENT
W.E. = WATERLINE EASEMENT

LOCATION MAP NO SCALE

CURVE TABLE				
CURVE	BEARING	CHORD	RADIUS	LENGTH
C1	S65°51'40"W	181.17	500.00	182.17
C2	N75°08'59"E	28.78	500.00	28.78
C3	N71°26'18"E	35.98	500.00	35.99
C4	S71°35'15"W	64.73	500.00	64.77
C5	S79°08'35"W	67.56	820.00	67.58
C6	N24°01'27"W	34.80	100.00	34.97
C7	S25°23'15"E	169.73	510.00	170.53
C8	N35°29'40"W	66.58	440.00	66.65
C9	N21°38'14"W	67.36	440.00	67.42
C10	S52°34'41"W	58.99	150.00	59.39
C11	S67°44'46"W	52.60	525.00	52.62
C12	S73°42'29"W	56.61	525.00	56.64
C13	N26°17'46"E	11.10	475.00	11.10
C14	N72°25'06"E	50.41	475.00	50.44
C15	S71°17'36"W	41.23	525.00	41.24
C16	S75°20'17"W	26.77	525.00	26.77
C17	S78°25'16"W	47.84	845.00	47.85
C18	S80°46'55"W	21.79	845.00	21.79
C19	N73°35'42"E	20.68	75.00	20.75
C20	S89°29'36"W	41.04	50.00	42.29
C21	N45°53'39"W	34.62	50.00	35.57
C22	N04°38'40"W	35.62	50.00	36.43
C23	N36°04'50"E	33.06	50.00	34.65
C24	N74°49'41"E	32.38	50.00	32.99
C25	S67°16'28"E	32.56	50.00	33.17
C26	N60°31'10"W	31.82	75.00	32.07
C27	N80°57'24"W	33.37	75.00	33.66
C28	S80°32'06"W	27.41	295.00	27.41
C29	S78°10'20"W	38.11	795.00	38.11
C30	S75°53'24"W	28.88	475.00	28.89
C31	S71°20'43"W	32.64	475.00	32.65
C32	S26°47'02"W	33.84	25.00	37.17
C33	S18°30'01"E	45.55	485.00	45.57
C34	S21°59'49"E	47.46	485.00	47.48
C35	S29°35'57"E	54.11	485.00	54.14
C36	S34°04'55"E	14.98	485.00	14.98
C37	N33°25'40"W	24.97	485.00	24.98
C38	S73°39'06"E	33.52	25.00	36.74
C39	N56°14'56"E	33.56	125.00	33.66
C40	N56°14'56"E	40.27	150.00	40.39
C41	N63°52'02"E	32.53	175.00	32.58
C42	N61°34'42"E	14.53	175.00	14.54
C43	S21°32'18"W	33.49	25.00	36.69
C44	N18°42'41"W	23.76	465.00	23.76
C45	S83°46'03"E	36.52	25.00	40.95
C46	N45°16'12"E	38.70	275.00	38.73
C47	S49°40'35"W	51.57	175.00	51.55
C48	N12°38'28"E	35.77	25.00	39.86
C49	N34°56'09"W	12.55	415.00	12.55
C50	S35°47'11"E	21.93	535.00	21.94
C51	S29°53'12"E	50.95	535.00	50.97
C52	S24°25'25"E	51.06	535.00	51.08
C53	S18°53'51"E	52.10	535.00	52.12
C54	S15°57'22"E	2.78	535.00	2.78
C55	N59°10'19"W	34.54	25.00	38.13
C56	S73°51'56"W	48.61	475.00	48.64
C57	S46°01'13"W	50.03	300.00	50.09
C58	S56°27'20"E	34.64	375.00	34.65
C59	S21°58'02"E	37.48	375.00	37.50
C60	S29°54'50"E	40.33	375.00	40.35
C61	S31°58'52"E	12.90	375.00	12.90
C62	N65°27'54"E	0.54	75.00	0.54

BEFORE YOU DIG STOP CALL 1-800-351-1111 TENNESSEE ONE CALL IT'S THE LAW

GRAPHIC SCALE
60 0 30 60 120 240
(IN FEET)
1 inch = 60 ft.

GPS SURVEY NOTE:
ALL BOUNDARY MONUMENTS AND SURVEY CONTROL WAS PERFORMED USING GPS RECEIVERS. TOPCON HIPER SR NETWORK ROVER, DUAL FREQUENCY WAS USED (L1,L2) GPS SURVEY PERFORMED WAS NETWORK ADJUSTED REAL TIME KINEMATICS BASED ON TDOT GNSS NETWORK NAD83(NSRS2007) VERTICAL DATUM IS NAVD88, GEOID09. PRECISION OF THE GPS WORK RPA: A CM PLUS 50 PARTS PER MILLION (BASED ON THE DIRECT DISTANCE BETWEEN THE TWO CORNERS BEING TESTED). DISTANCES HAVE NOT BEEN REDUCED TO GRID.

NOTE:
ALL RECORDED CERTIFICATIONS AND APPLICABLE NOTES FOR THIS PLAT ARE PROVIDED ON SHEET #1.

6-SB-24-F

COUNTERSIGNED
KNOX COUNTY PROPERTY ASSESSOR
JUL 17 2024
BY

Certification of Final Plat – All Indicated Markers, Monuments and Benchmark to be Set When Construction is Completed.

I hereby certify that I am a registered land surveyor licensed to practice surveying under the laws of the State of Tennessee. I further certify that this plat and accompanying drawings, documents, and statements conform, to the best of my knowledge, to all applicable provisions of the Knoxville–Knox County Subdivision Regulations except as has been itemized, described and justified in a report filed with the Planning Commission, or for variances and waivers which have been approved as identified on the final plat. The bond or other security that is posted to guarantee the completion of streets and related improvements shall also guarantee the installation of the indicated permanent reference markers and monuments, and benchmarks and property monuments upon completion of the subdivision.

Registered Land Surveyor RYAN S. LYNCH
Tennessee License No. 2447
Date: 04–23–2024

Certification of Class and Accuracy of Survey

I HEREBY CERTIFY THAT THIS IS A CATEGORY "IV" SURVEY IN ACCORDANCE WITH THE TENNESSEE STANDARDS OF PRACTICE.

Certification of the Accuracy of Survey

Survey accuracy shall meet the requirements of the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors Standards of Practice.

I hereby certify that this survey was prepared in compliance with the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors – Standards of Practice.

Registered Land Surveyor RYAN S. LYNCH
Tennessee License No. 2447
Date: 04–23–2024

RYAN S. LYNCH — REGISTERED LAND SURVEYOR — TENNESSEE NO. 2447
04/23/2024

SURVEY FOR:
Eagle Bend Development
1920 Ebenezer Road
Knoxville, Tennessee 37922
Phone: (865) 693-3356

FINAL PLAT OF:
THE RIDGE AT NEALS LANDING – UNIT 2
Lots 30–59, 83, 89–97, 113–127 & 142
Knoxville, Tennessee
District 8, Knox County, Tennessee

SHEET NO. 2 of 2
PROJECT NO. 4143

LYNCH SURVEYS LLC
SUBDIVISIONS | AS-BUILTS | SITE DESIGN
4405 COSTER RD. KNOXVILLE, TENN. 37912
865-584-2630 FAX: 865-584-2801 WWW.LYNCHSURVEY.COM

REVISIONS	
DRAWN BY: M.STRANGE	1 PS COMMENTS 05282024
CHECKED BY: R. LYNCH	2 05/30/2024 PS COMMENTS
APPROVED BY: R.S.L	3 05/31/2024 ps comments
SCALE: 1"=60'	4
DATE: 04/23/2024	5
	6

ENGINEERING & PUBLIC WORKS

Codes Enforcement · Fleet Services · Operations · Development Services · Solid Waste · Strategic Planning

Knox County Tennessee Road Acceptance

Name of Subdivision: The Ridge at Neals Landing Unit 3
Developer: Eagle Bend Development
Commission District: 8
Inspector: Cody Parker
Date: February 6, 2026

Name of Road	Length of Road	Resurfacing w/Profile Mill Included in Cost
Limelight Lane	690 LF	$ 26,651.94
Vista View Lane	700 LF	$ 27,038.20
	Total Miles 0.26	Total $ 53,690.14

Knox County Engineering is recommending the acceptance of the right-of-way along the above streets as shown on the recorded plat instrument number 202507220004217.

205 West Baxter Avenue · Knoxville, TN 37917 · 865-215-5800

New Road Checklist:

Name of Subdivision: The Ridge at Neals Landing
Inspector: Jeffrey Primm
Date Surfaced: July 18, 2025

- Curbs are backfilled
- Correct signs have been installed per the MUTCD manual
  - Street signs
  - Stop signs
  - Speed limits signs
  - Children at play signs
  - No Outlet signs if applicable
  - Street is free of standing water
- Sidewalks are located within the ROW
- Bridge(s) spanning 20' or more located within this road section

If yes, provide a brief description:

_____

_____

EPW file # 119-041
Recommended for road acceptance: Yes

Land Development Construction Inspector — Date: 2-6-2026

Construction Services Supervisor — Date: 2-6-2026

TOTAL AREA
9.71 Acres
422,785 sq. ft.
INCLUDES COMMON AREA, FUTURE DEVELOPMENT AND R.O.W.

TOTAL BUILDING LOTS = 44

TN GRID

Planning Commission Certification of Approval for Recording – Final Plat

This is to certify that the subdivision plat shown hereon has been found to comply with the Subdivision Regulations of Knoxville and Knox County and with existing official plans, with the exception of any variances and waivers noted on this plat and in the minutes of the Knoxville–Knox County Planning Commission, on this the ____ day of ______ 20____, and that the record plat is hereby approved for recording in the office of the Knox County Register of Deeds. Pursuant to Section 13–3–405 of Tennessee Code, Annotated, the approval of this plat by the Planning Commission shall not be deemed to constitute or effect an acceptance by the City of Knoxville or Knox County of the dedication of any street or other ground upon the plat.

Signed: Amy A. Brooks FR

Date: 7/22/2025

Zoning

Zoning Shown on Official Map PR 1-6 DU/AC

Date: 7/22/2025

By: ______

Addressing Department Certification

I, the undersigned, hereby certify that the subdivision name and all street names conform to the Knoxville or Knox County Street Naming and Addressing Ordinance, the Addressing Guidelines and Procedures, and these regulations.

Signed: ______

Date: 7/22/2025

Taxes and Assessments

This is to certify that all property taxes and assessments due on this property have been paid.

City Tax Clerk: Signed: ______ Date ______

Knox County Trustee: Signed: JUSTIN BIGGS Date Jul 16, 2025

Knox County Department of Engineering and Public Works

The Knox County Department of Engineering and Public Works hereby approves this plat on this the ______ day of 20______

Engineering Director Amanda Purkey for Jim Snowden Jul 21, 2025

Certification of Approval of Public Sanitary Sewer System - Major Subdivisions

I hereby certify that the utility provider was contacted by the developer or owner of the property to determine the status of the public sanitary sewer system and the public sanitary sewer system was installed, or will be installed, in accordance with State and local regulations.

Knoxville Utilities Board

Utility Provider
Clayton Hollifield Jul 17, 2025
Authorized Signature for Utility Date

Certification of Approval of Public Water System - Major Subdivisions

I hereby certify that the utility provider was contacted by the developer or owner of the property to determine the status of the public water system and the public water system was installed, or will be installed, in accordance with State and local regulations.

Knoxville Utilities Board

Utility Provider
Clayton Hollifield Jul 17, 2025
Authorized Signature for Utility Date

Inspection of Completed Streets and Related Improvements.

I, the undersigned, hereby certify this subdivision has been inspected and all streets and related improvements have been completed in a manner that meets all city standards and specifications and have been officially accepted as built by the appropriate official(s).

Signed: Amanda Purkey for Jim Snowden
Date: Jul 21, 2025
Dept: EPW
Title: Engineer

Inspection of Completed Stormwater Facilities.

I, the undersigned, hereby certify this subdivision has been inspected and the stormwater facilities have been completed in a manner that meets all city and county standards and specifications (whichever is appropriate) and are fully stabilized and have been officially accepted as built by the appropriate official(s).

Signed: Amanda Purkey for Jim Snowden Date: Jul 21, 2025

Dept: EPW Title: Engineer

GRAPHIC SCALE

(IN FEET)
1 inch = 60 ft.

LINE LEGEND	
— · — · —	SANITARY SEWER EASE.
— — — —	DRAINAGE EASE.
— · · — · · —	SIGHT DISTANCE EASE.

SYMBOL LEGEND	
○	FOUND MONUMENTATION (WITH SIZE & TYPE)
◉	SET MONUMENTATION (SEE NOTE 1)
△	PERMANENT REFERENCE MARKER

S.S.E. = SANITARY SEWER EASEMENT
D.E. = DRAINAGE EASEMENT

Certificate of Ownership and General Dedication

MESANA INVESTMENTS LLC
1515 ASHLAND SPRINGS WAY
KNOXVILLE, TN 37922

(I, We), the undersigned owner(s) of the property shown herein, hereby adopt this as (my, our) plan of subdivision and dedicate the streets as shown to the public use forever and hereby certify that (I am, we are) the owner(s) in fee simple of the property, and as property owner(s) have an unrestricted right to dedicate right–of–way and/or grant easement as shown on this plat

Owner(s) Printed Name: Scott Davis Signature(s): ______

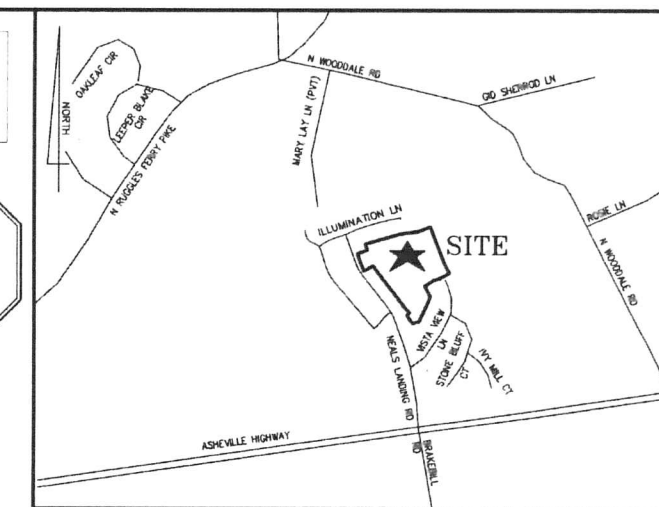
Date: Jul 16, 2025

Property owners are responsible for maintenance of Stormwater facilities. The covenant for maintenance of stormwater facilities is recorded as instrument #202211300032118 and

BEFORE YOU DIG
STOP
CALL
1-800-351-1111
TENNESSEE ONE CALL
IT'S THE LAW

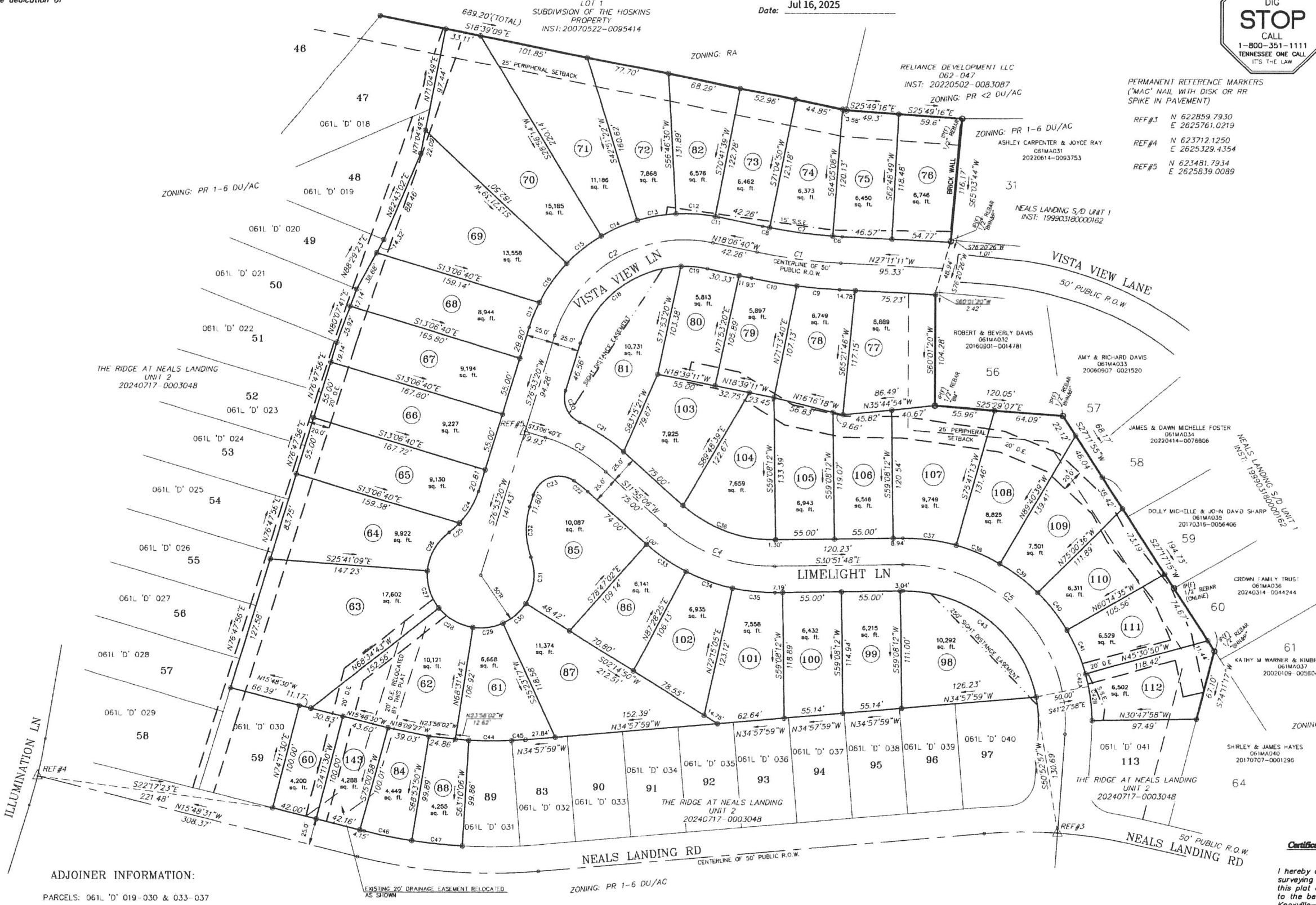
PERMANENT REFERENCE MARKERS
('MAG' NAIL WITH DISK OR RR SPIKE IN PAVEMENT)

REF#3 N 622859.7930 E 2625761.0219
REF#4 N 623712.1250 E 2625329.4354
REF#5 N 623481.7934 E 2625839.0089



LOCATION MAP NO SCALE

1. IRON PINS SET AT ALL CORNERS, BY THIS SURVEY, UNLESS OTHERWISE NOTED. ALL NEW PROPERTY MONUMENTS ARE 1/2" x 18" REBAR IRON PINS WITH PLASTIC CAP STAMPED "LYNCH 2447".
2. CLT TAX MAP 061 PART OF PARCELS 070.01.
3. DEED REFERENCES – 070.01– 20190517–0067775
PLAT REFERENCE – EXEMPT SUBDIVISION PLAT OF KENNEDY & NEAL PROPERTY 20190424–0062417
RIDGE AT NEALS LANDING UNIT 2 (FUTURE DEVELOPMENT AREA) 20240717–0003048
4. THIS PROPERTY IS ZONED PR 1–6 DU/AC (PARCEL 071.01)
MINIMUM SETBACKS:
FRONT: 20' SIDE: 5' REAR: 15'
PERIPHERAL: 25'
5. THIS PROPERTY DOES NOT LIE WITHIN A 100/500 YEAR FLOOD ZONE PER FIRM FLOOD INSURANCE RATE MAP NUMBER: 47093C0169F EFFECTIVE DATE: MAY 02, 2007.
6. ALL UNDERGROUND UTILITIES ARE REFERENCED TO UTILITY COMPANIES MAPS AND ARE TO BE CONSIDERED APPROXIMATE.
7. NORTH ROTATION: NAD83(NSRS2007)
8. THE REQUIRED UTILITY AND DRAINAGE EASEMENT SHALL BE TEN (10) FEET IN WIDTH INSIDE ALL EXTERIOR LOT LINES ADJOINING STREETS AND PRIVATE RIGHTS–OF–WAY (INCLUDING JOINT PERMANENT EASEMENTS). EASEMENTS OF FIVE (5) FEET IN WIDTH SHALL BE PROVIDED ALONG BOTH SIDES OF ALL INTERIOR LOT LINES AND ON THE INSIDE OF ALL OTHER EXTERIOR LOT LINES.
9. 15' PERMANENT UTILITY EASEMENT 7.5' ON EACH SIDE OF ALL WATER AND SANITARY SEWER LINES AS INSTALLED.
10. 20' PERMANENT DRAINAGE EASEMENT 10' ON EACH SIDE OF ALL STORM WATER LINES AS INSTALLED.
11. ALL LOTS TO HAVE ACCESS TO INTERNAL ROAD SYSTEM ONLY.
12. FOR APPROVED SUBDIVISION VARIANCES AND CONDITIONS OF APPROVAL OF THE CONCEPT PLAN AND USE–ON–REVIEW, REFER TO KNOXVILLE–KNOX COUNTY PLANNING'S FILES 6–SF–24–C AND 6–J–24–DP (APPROVED 06/13/2024).
13. HOMEOWNERS ASSOCIATION DOCUMENTATION RECORDED AS INSTRUMENT NUMBER: ______
14. THE APPROVAL OF THIS PLAT DOES NOT INCREASE ANY ZONING NON–CONFORMITIES FOR THE EXISTING STRUCTURES ON THE PROPERTY NOR DOES IT CHANGE THE NON–CONFORMING STATUS OF THE EXISTING STRUCTURES. DOCUMENTATION AS TO THE LEGAL STATUS OF THE STRUCTURES OR VARIANCES FROM THE BOARD OF ZONING APPEALS MAY BE REQUIRED AT SOME TIME LATER FOR PERMIT APPLICATIONS OR OTHER DEVELOPMENT APPROVALS.
15. THE SIGHT DISTANCE ON THE INTERSECTING PUBLIC ROAD DOES MEET THE REQUIREMENTS OF SUBDIVISION REGULATIONS [SR SECTION 3.04.J]
16. THE DESIGN PLAN WAS APPROVED BY KNOX COUNTY ENGINEERING AND PUBLIC WORKS ON 03/18/2025.



ADJOINER INFORMATION:

PARCELS: 061L 'D' 019–030 & 033–037

DR HORTON INC
1431 CENTERPOINT BLVD
SUITE 110
KNOXVILLE,TN 37932

PARCELS: 061L 'D' 031

JOSHUA DESJARDIN & MORIAH HUNT268
NEALS LANDING RD
KNOXVILLE,TN 37924

PARCELS: 061L 'D' 032

JEFFREY FALIN
264 NEALS LANDING RD
KNOXVILLE,TN 37924

PARCELS: 061L 'D' 038–041

MESANA INVESTMENTS LLC
1515 ASHLAND SPRINGS WAY
KNOXVILLE,TN 37922

CURVE	BEARING	CHORD	RADIUS	LENGTH
C1	S22°38'55"E	79.11	500.00	79.20
C2	N60°36'40"W	171.60	127.00	188.41
C3	N00°35'47"W	65.01	150.00	65.53
C4	S09°28'21"E	109.42	150.00	112.00
C5	N08°50'07"E	191.63	150.00	207.86
C6	S26°38'59"E	8.90	475.00	8.90
C7	S22°30'59"E	59.60	475.00	59.64
C8	S18°30'55"E	6.70	475.00	6.70
C9	S24°59'57"E	40.07	525.00	40.08
C10	S20°27'41"E	43.06	525.00	43.07
C11	N18°42'31"W	3.17	152.00	3.17
C12	N26°15'56"W	36.83	152.00	36.93
C13	N40°11'04"W	36.83	152.00	36.93
C14	N54°06'12"W	36.83	152.00	36.93
C15	N68°51'04"W	41.20	152.00	41.32
C16	N85°07'25"W	44.85	152.00	45.02
C17	S81°38'26"W	25.18	152.00	25.21
C18	N67°36'38"W	118.47	102.00	126.40
C19	N25°06'37"W	24.86	102.00	24.92
C20	S36°12'45"W	32.59	25.00	35.50
C21	N03°43'39"E	49.87	175.00	50.04
C22	N08°09'14"E	16.41	125.00	16.43
C23	N49°21'40"W	40.32	25.00	46.91
C24	S89°33'01"E	35.17	75.00	35.50
C25	S71°06'55"E	12.74	75.00	12.76

CURVE	BEARING	CHORD	RADIUS	LENGTH
C26	S89°02'11"W	41.82	50.00	43.15
C27	S42°52'04"W	36.56	50.00	37.43
C28	S00°01'29"E	36.56	50.00	37.43
C29	S38°02'29"E	28.52	50.00	28.92
C30	S71°10'56"E	28.52	50.00	28.92
C31	N66°07'59"E	44.02	50.00	45.58
C32	S58°27'14"W	47.43	75.00	48.26
C33	S04°41'46"W	44.00	175.00	44.12
C34	S10°08'15"E	46.36	175.00	46.49
C35	S24°18'22"E	39.97	175.00	40.06
C36	S09°28'21"E	91.18	125.00	93.34
C37	N22°35'17"W	50.38	175.00	50.55
C38	N06°59'43"W	44.58	175.00	44.70
C39	N07°39'23"E	44.68	175.00	44.80
C40	N22°22'25"E	44.98	175.00	45.10
C41	N37°07'18"E	44.86	175.00	44.99
C42A	N46°30'36"E	12.36	175.00	12.36
C42B	N53°52'02"E	32.53	175.00	32.58
C43	N08°50'07"E	159.69	125.00	173.22
C44	S29°54'50"E	40.33	375.00	40.35
C45	S33°58'52"E	12.90	375.00	12.90
C46	S18°30'01"E	45.55	485.00	45.57
C47	S23°59'49"E	47.46	485.00	47.48

Nick McBride
Register of Deeds
Knox County

Knox County, TN Page: 1 of 1
REC'D FOR REC 7/22/2025 9:17 AM
RECORD FEE: $17.00 T20250027667
M. TAX: $0.00 T. TAX: $0.00
202507220004217

VARIANCES

1. REDUCE THE MINIMUM VERTICAL CURVE K VALUE FROM 25 TO 23 ON VISTA VIEW LANE AT STA 116+25.

ALTERNATIVE DESIGN STANDARDS REQUIRING KNOXVILLE–KNOX COUNTY PLANNING COMMISSION APPROVAL

1. REDUCE THE MINIMUM HORIZONTAL CURVE RADIUS FROM 250' TO 127' ON VISTA VIEW LANE AT CURVE 'C5'.

6-SG-25-F

Certification of Final Plat – All Indicated Markers, Monuments and Benchmarks to be Set When Construction is Completed.

I hereby certify that I am a registered land surveyor licensed to practice surveying under the laws of the State of Tennessee. I further certify that this plat and accompanying drawings, documents, and statements conform, to the best of my knowledge, to all applicable provisions of the Knoxville–Knox County Subdivision Regulations except as has been itemized, described and justified in a report filed with the Planning Commission, or for variances and waivers which have been approved as identified on the final plat. The bond or other security that is posted to guarantee the completion of streets and related improvements shall also guarantee the installation of the indicated permanent reference markers and monuments, and benchmarks and property monuments upon completion of the subdivision.

Registered Land Surveyor ______
Tennessee License No. 2447
Date: 04/28/2025

Certification of Class and Accuracy of Survey

I HEREBY CERTIFY THAT THIS IS A CATEGORY "IV" SURVEY IN ACCORDANCE WITH THE TENNESSEE STANDARDS OF PRACTICE.

Certification of the Accuracy of Survey

Survey accuracy shall meet the requirements of the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors – Standards of Practice.

I hereby certify that this survey was prepared in compliance with the current edition of the Rules of Tennessee State Board of Examiners for Land Surveyors – Standards of Practice.

Registered Land Surveyor ______
Tennessee License No. 2447
Date: 04–28–2025

RYAN S. LYNCH
REGISTERED LAND SURVEYOR
COMMERCE
4/28/25
TENNESSEE No. 2447

GPS SURVEY NOTE:
ALL BOUNDARY MONUMENTS AND SURVEY CONTROL WAS PERFORMED USING GPS
RECEIVER: TOPCON HIPER SR NETWORK ROVER, DUAL FREQUENCY WAS USED (L1,L2)
GPS SURVEY PERFORMED WAS NETWORK ADJUSTED REAL TIME KINEMATICS BASED ON TDOT GNSS NETWORK NAD83(NSRS2007) VERTICAL DATUM IS NAVD88, GEOID09.
PRECISION OF THE GPS WORK RPA: 4 CM PLUS 50 PARTS PER MILLION (BASED ON THE DIRECT DISTANCE BETWEEN THE TWO CORNERS BEING TESTED). DISTANCES HAVE NOT BEEN REDUCED TO GRID.

LYNCH SURVEYS LLC
SUBDIVISIONS | AS-BUILTS | SITE DESIGN
4405 COSTER RD. KNOXVILLE, TENN. 37912
865-584-2630 FAX: 865-584-2801 WWW.LYNCHSURVEY.COM

DRAWN BY: M.STRANGE	
CHECKED BY: R. LYNCH	
APPROVED BY: R.S.L.	
SCALE: 1"=60'	
DATE: 04/28/2025	

REVISIONS
1 05/14/2025 PS COMMENTS
2 05/28/2025 PS COMMENTS
3
4
5
6

SURVEY FOR:

Eagle Bend Development
1920 Ebenezer Road
Knoxville, Tennessee 37922
Phone: (865) 693-3356

FINAL PLAT OF:

THE RIDGE AT NEALS LANDING – UNIT 3
Lots 60–82, 84–88, 98–102, 104–112 & 143
Knoxville, Tennessee
District 8, Knox County, Tennessee

SHEET NO.
1 of 1

PROJECT NO.
4143–9

RLA-18207 **42.**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: FINANCE DEPARTMENT

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Line Item Transfers - Total amount of $18,715.66.
(Finance)

Attachments

Line Items

KNOX COUNTY
BUDGET TRANSFER REQUEST FORM

Department: Parks & Recreation

Date: 2/20/2026

Authorizing Signature: Joseph D Mack

TRANSFER FROM:

ORG Code	Object Code	Account Name	Amount
1014856	530945	Youth Sports - Softball	8,122.09
1014857	540901	Adult Kickball	10,593.57
		TOTAL	$ 18,715.66

TRANSFER TO:

ORG Code	Object Code	Account Name	Amount
1014836	518900	Sports & Rec. - Full Time Pay	8,122.09
1014830	518900	Rec Admin. - Full Time Pay	10,593.57
		TOTAL	$ 18,715.66

JUSTIFICATION/EXPLANATION:
To transfer budget dollars to fund increases for positions

Approved: _____ County Mayor — Date: 2/23/26

Approved as the availability of Funds: _____ Senior Director of Finance — Date: 2/20/26

Approved for Transfer of Funds: _____ Chairman, County Commission — Date: _____

RLA-18179 **43.**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Jill Rosberg, LAW DEPARTMENT
Department:	COUNTY MAYOR
Requires Expenditure of Funds:	NO
Funded in Current Budget:	YES
Appropriation Required:	NO

Information

CAPTION

Spread of Record the Order of the Knox County Mayor reappointing Mark Dixon to the Board of Commissioners of the Knox Chapman Utility District.
(County Mayor)

Attachments

Order of the Mayor

ORDER OF THE KNOX COUNTY MAYOR
APPOINTING UTILITY DISTRICT COMMISSIONER

IN RE:	)
	)
COMMISSIONER APPOINTMENT	)
FOR THE KNOX CHAPMAN	)
UTILITY DISTRICT OF	)
KNOX COUNTY, TENNESSEE	)

Upon certification by the Board of Commissioners of the Knox Chapman Utility District of Knox County, Tennessee, certifying an upcoming vacancy on said Board of Commissioners by the expiration of the term of Mark Dixon, and certifying a list of three names nominated for appointment to fill such vacancy in accordance with T.C.A. § 7-82-307(a);

IT IS THEREFORE ORDERED, ADJUDGED AND DECREED, AS FOLLOWS:

(a) That Mark Dixon is hereby reappointed to the Board of Commissioners of the Knox Chapman Utility District of Knox County, Tennessee, to serve a four (4) year term expiring April 4, 2030. Mark Dixon took the oath of office on February 13, 2026, a copy of which is attached hereto as Exhibit A.

(b) That a copy of this Order shall be entered into the minutes of the Knox County Commission as is required by T.C.A. § 7-82-307(a)(4), and that a certified copy of this order be provided to the Knox Chapman Utility District Board of Commissioners and the appointee as required by T.C.A. § 7-82-307(a)(4).

(c) That this Order shall be kept by the Knox County Clerk as a permanent record of Knox County, and the Knox County Clerk shall issue certified copies of this Order as shall be requested.

ENTERED this 19th day of February, 2026.

GLENN JACOBS
KNOX COUNTY MAYOR

OATH OF OFFICE

BOARD OF COMMISSIONERS
KNOX CHAPMAN UTILITY DISTRICT BOARD

I, Mark Dixon, do solemnly swear that I will perform with fidelity the duties of the office to which I have been appointed and which I am about to assume. I do solemnly swear to support the Constitution of the State of Tennessee and the Constitution of the United States and to faithfully perform the duties of the office of Commissioner for the Knox Chapman Utility District Board.

MARK DIXON

Subscribed and sworn to before me this
13th day of February, 2026.

GLENN JACOBS
Knox County Mayor

EXHIBIT
A

RLA-18182 **44.**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Jill Rosberg, LAW DEPARTMENT
Department:	District Attorney General
Requires Expenditure of Funds:	NO
Funded in Current Budget:	YES
Appropriation Required:	YES

Information

CAPTION

Spread of Record the grant application to the State of Tennessee, Department of Finance and Administration, Office of Criminal Justice Programs for funding a Victims of Crime Act (VOCA) Victim Witness Coordinator Position submitted by the Knox County District Attorney's Office.
(District Attorney)

Attachments

Victim Witness Coordinator funding letter

Department of Finance & Administration

To: Knox County Government

RE: OCJP funding for FY27

Date: February 18, 2026

The purpose of this letter is to clarify the status of your FY27 funding for State VWC from the Office of Criminal Justice Programs. The Office of Criminal Justice Programs (OCJP) has a solicitation under VOCA/SVS Victim Witness Coordinators available for your program, current contract number 51045.

OCJP is now utilizing an online portal "TN Grants" for the purposes of accepting applications, issuing contracts, and conducting project management. As a result of these changes to our business practices we are requiring all current grantees who wish to apply for funding in FY27 to utilize this system.

We are currently issuing one-year grants to eligible subrecipients as both OCJP staff and subrecipients become familiar with the new system.

The term for your project is: July 1, 2026 – June 30, 2027.

The total amount your agency is eligible to apply for is listed below.

Federal Funds	State Funds	Total
$52,000.00	$13,000.00	$65,000.00

Your agency is eligible to apply for funding under our VOCA/SVS solicitation for your project area. We are utilizing State Victim Services (SVS) to make the match for your agency. **Your agency will not be required to make an agency match as a part of your project.**

NOTE: Organizations found to not be solvent at the time of application or not able to demonstrate compliance may be ineligible for funding. To be considered for funding, applicants must provide a clear, compelling response to each question or prompt in the narrative/scope of service. The narrative/scope of service should be succinct, light on acronyms, and be easy to follow for a person who is not in the field of your project.

Application should be submitted through the applicant portal in TN Grants. You may contact your program manager with questions about the application process. You can view resources and training on TN Grants here.

Attached you will find the supplemental document for the application. Please review this in full prior to completing the narratives/scope of services and/or budgets in TN Grants.

A direct link to your solicitation can be found here: Solicitation Link

Please refer to the supplemental information provided by your program manager and accompanying this letter as that document which will detail any additional application requirements.

RLA-18164 **45.**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Danielle Davis, BENEFITS
Department:	BENEFITS
Requires Expenditure of Funds:	NO
Funded in Current Budget:	NO
Appropriation Required:	NO

Information

CAPTION

Spread of Record the election of Ashley Ramos to represent the Knox County Mayor's Office Seat A, Sara Crosby to represent the Knox County Sheriff's Office Seat B, and Michael Mays representing constitutional/fee offices Seat C on the Health Insurance Appeal Board to fulfill terms beginning March 1, 2026, and ending February 28, 2030. *(Benefits)*

Attachments

Spread of Record information

Spread of Record the election of Ashley Ramos to represent the Knox County Mayor's Office Seat A, Sara Crosby to represent the Knox County Sheriff's Office Seat B, and Michael Mays representing constitutional/fee offices Seat C on the Health Insurance Appeal Board to fulfill terms beginning March 1, 2026 and ending February 28, 2030.

(Benefits)

RLA-18204 **R-26-3-112**

COMMISSION

Meeting Date:	03/23/2026
Requested By:	Drucilla Stills, COUNTY COMMISSION
Department:	COUNTY COMMISSION
Requires Expenditure of Funds:	Funded in Current Budget:
Appropriation Required:	

Information

CAPTION

Consideration of a Resolution of the Commission of Knox County, Tennessee, accepting the resignation of Daniel Herrera on the Knox County Sheriff's Office Employees' Merit System Board of Directors and appointing _____ to serve the unfulfilled term of Mr. Herrera on the Board, which such term to expire September 30, 2028.
(Commissioner Oster)

Attachments

Resolution
Resignation Letter - Daniel Herrera
Resumes
Public Notice

RESOLUTION

A RESOLUTION OF THE COMMISSION OF KNOX COUNTY, TENNESSEE ACCEPTING THE RESIGNATION OF DANIEL HERRERA ON THE KNOX COUNTY SHERIFF'S OFFICE EMPLOYEES' MERIT SYSTEM BOARD OF DIRECTORS AND APPOINTING _____ TO SERVE THE UNFULFILLED TERM OF MR. HERRERA ON THE BOARD, WHICH SUCH TERM TO EXPIRE SEPTEMBER 30, 2028.

RESOLUTION: **R-26-3-112**

REQUESTED BY: **COMMISSIONER OSTER**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED:_____
DATE

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, Section 42-53 of the Knox County Code provides for the Knox County Sheriff's Office Employees' Merit System Board of Directors (hereinafter the "Merit System Board of Directors") to be composed of seven (7) members with (3) three members appointed by the County Mayor and four (4) members appointed by the Knox County Commission (the "Commission"); and

WHEREAS, Daniel Herrera, who is one of the Commission's appointees, recently resigned from his seat on Merit System Board of Directors, leaving an unfulfilled term expiring September 30, 2028; and

WHEREAS, the Commission conducted an open and transparent process for the purpose of filling this vacancy on the Merit System Board of Directors, including publishing notice in a newspaper of general circulation and interviewing candidates interested in serving on the Merit System Board of Directors at a duly noticed public meeting; and

WHEREAS, after due consideration, the Commission desires to fill this vacancy on the Merit System Board of Directors.

NOW THEREFORE BE IT RESOLVED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

The Knox County Commission hereby accepts the resignation of Daniel Herrera on the Merit System Board of Directors and appoints _____ to complete the unfulfilled term of Mr. Herrera on the Merit System Board of Directors with such term to expire on September 30, 2028.

BE IT FURTHER RESOLVED, that if any notifications are to be made to effectuate this Resolution, then the County Clerk is hereby requested to forward a copy of this Resolution to the proper authority.

BE IT FURTHER RESOLVED, that this Resolution is to take effect from and after its passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

_____

Presiding Officer of the Commission Date

_____

County Clerk Date

Approved:_____

County Mayor Date

Vetoed:_____

County Mayor Date

Drucilla Stills

From: Paula Taylor
Sent: Tuesday, January 13, 2026 8:16 PM
To: Drucilla Stills
Subject: Fw: [External]Merit Board Resignation

Follow Up Flag: Follow up
Flag Status: Completed

Hi Drucilla,

I received this email from Mr. Herrera this evening.

Thank you,

Paula

From: Daniel Herrera <daniel@herrerastill.com>
Sent: Tuesday, January 13, 2026 5:46 PM
To: Paula Taylor <Paula.Taylor@knoxcounty.org>
Subject: [External]Merit Board Resignation

Paula,

Thank you for reading my email. Please take this email as my official resignation from the Merit Board, effective upon receipt. Please let me know if you need anything else. Thank you.

Daniel A. Herrera, Esq.
Partner | Attorney-at-Law
HERRERA STILL, PLLC
1518 N. Broadway
Knoxville, TN 37917
Phone: (865) 888-6224





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KNOX COUNTY SHERIFF'S OFFICE EMPLOYEES' MERIT SYSTEM BOARD OF DIRECTORS
March 2026

(To fill the unexpired term of Daniel Herrera)

(Term expires September 30, 2028)

1. Jaybee Brennan
2. Adam Cook

Drucilla Stills

From: J Brennan [redacted]
Sent: Monday, March 2, 2026 3:06 PM
To: Commission
Subject: [External]Knox County Sheriff"s Office Employees' Merit System Board of Directors Opening
Attachments: Resume 2026 Merit Council.doc

I am interested in the Knox County Sheriff's Office Employees' Merit System Board of Directors opening. Please see my attached resume for review.

I am out-of-state March 15-24, 2026. I am aware that applicants will be interviewed on March 16, 2025 at 3 pm. I can be reached by telephone as a call-in while I am on-the-road for interview, if that is acceptable to the Commission. If that is not acceptable, I respectfully request that the Commission refer to my resume for qualifications, as well as my past 2 interviews with the same Commissioners for the same position.

I have reviewed the policy and procedures for the Merit System Board of Directors and can/will comply with its rules and regulations. There is nothing in my background that I am aware that will prohibit my selection. I previously served on the Merit Board from July to September 2025.

Thank you for your time.

Respectfully,

Jaybee Brennan

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KNOX COUNTY
COMMISSION

JAYBEE BRENNAN

[redacted]

OBJECTIVE: Knox County Sheriff's Office Merit Council Board of Directors

EDUCATION: Bachelor of Science, Criminal Justice Administration, California State University, San Diego.

Southwestern College, San Diego Sheriff's Department, 73rd Sheriff's Academy, Basic P.O.S.T. certificate.

Police Officer Standards and Training (P.O.S.T.), 3000+ hours. Coursework includes supervisory, management, leadership, and technical training in each rank.

PROFESSIONAL EXPERIENCE:

July 2025 to October 2025: Knox County Sheriff's Office Merit Council Board of Directors

Sept 2016 to present: Community Volunteer

Scouting America-Great Smoky Mountain Council:
- -Membership Standards Committee
- -Scoutfest Staff.

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Shangri-La Therapeutic Academy of Riding (STAR):
- -Songwriters event committee
- -Bridles and Blue Jeans event committee
- -Events Community Outreach and Fundraising Committee
- -Special Needs Equine event staff

2014 to 2015: Riverside Police Department, Central Investigations Bureau Commander

Management of the Centralized Investigations Bureau (CIB); including the specialized Units of Homicide/Robbery, Missing Persons, Sexual Assaults/Crimes Against Children, Economic Crimes, Computer Forensics, Evidence Unit, and Domestic Violence Unit. These duties included executive writing skills, budgeting and oversight of bureau assets, management of Officer-Involved-Shooting incidents and Casebook reviews, Press Information Officer duties, and policy writing. Working Group member in CAL-CHIEF's for research of a state-wide "best practices" policy on U-Visa and T-Visa law enforcement policy.

Aug 2012 to Aug 2014: Riverside Police Department, Support Services, Training Bureau Commander

Management and oversight of departments Training Bureau. Duties include management and oversight of Field Training Officer Program, Police Range, Mentor Program, POST Critical Issues and Tactics training for all sworn personnel, Cadet Program, Reserve Program, writing of training policy, and special projects. Management of the department's POST and non-POST training budgets. Member of NIWAP U-Visa policy group for the creation and distribution of the national "Blue Ribbon Campaign" Federal Law Enforcement Training Center (FLETC) training video's on U-Visa and T-Visa. These Violence Against Women's Act (VAWA) policy recommendations and training video for U-Visa and T-Visa Policy were submitted as a staff report to then Vice-President Joe Biden.

Jan 2011 to Aug 2012: Riverside Police Department, Police Lieutenant - Field Operations

Management, administrative and Watch Commander duties on all shifts. Oversight, training, and development of personnel, Incident Commander at critical incidents, discipline of employees, and review and make recommendations for operating procedures within the division to Command Staff. Obtained P.O.S.T. Management Certificate.

Nov 2001 to Jan 2011: Riverside Police Department, Police Sergeant - Field Operations, Office of the Chief of Police, General Investigations, Special Operations assignments.

Provided oversight and training of recruits as Field Operations Field Training Officer (FTO) Sergeant. Compiled research and made policy recommendations to Chief of Police while assigned to Audit and Compliance Unit and Chief's Adjutant positions. Projects included state-wide Community Police Review Board study, County-wide Sexual Assault Teams, Youth Advisory Teams, and Case Management Audit. Wrote draft Strategic Plan and coordinated community outreach for Strategic Plan input. Public Information Officer duties included receiving Public Records Acts requests and acting as department spokesperson at major incidents. Developed Family Justice Center partnership protocols, coordinated case filing protocols with District Attorney's Office, and organized community outreach events. One of just three county-wide court certified subject-matter-experts in domestic violence. Earned Riverside County's LEAC Award for Excellence in Community Service and was a Recipient of District Attorney's Office Resolution for community service and leadership. Completed Internal Affairs and Traffic Division supervision assignments. Supervised 104 employees; including Traffic Detectives, officers, civilian PSR's, and crossing guards as Traffic Division Administrative Sergeant. Graduate of Chamber of Commerce Leadership Program.

Nov 2000 to Nov 2001 Riverside Police Department, Police Detective - General Investigations Division, Economic Crimes

Detective assigned to investigate economic crimes including fraud, identity theft, scam crimes, and bank embezzlement.

May 1997 to Nov 2000 Riverside Police Department, Police Officer

Field Operations with Collateral assignment as a Field Training Officer. Awarded Division Commander's Commendation for creation and implementation of Officer ABC program. Assigned to University Neighborhood Enhancement Team (UNET).

Jan 1994 to May 1997 El Cajon Police Department, Police Sergeant

Assignments included Watch Commander, Training Division, Background Investigator, Inspection & Control Auditor, OSHA Compliance, and Internal Affairs Investigator. Nominated for Medal of Valor on a critical incident. Awarded Police Medal for Heroism on a critical incident involving a hostage barricade with an infant child.

Oct 1985 to Jan 1994 El Cajon Police Department, Police Officer and Detective assignments including:

Various assignments as an Officer and Detective included Field Training Officer, Grant Writer, Research, Planning and Development Unit, Problem Oriented Policing Coordinator, and Domestic Violence Unit as a Detective. Handling 300 domestic violence cases monthly. Awarded Lifesaving Medal for medical aid to an attempt murder victim. Graduate of Chamber of Commerce Leadership Program.

TRAINING AND CERTIFICATES:

- Basic, Intermediate, Advanced, Supervisory, Management POST Certificates
- POST Management School
- POST Supervisory Leadership Institute (Valedictorian)
- Toastmasters International, CC, ACB
- POST Internal Affairs School
- POST Tactical Response to Critical Incidents
- POST Advanced Criminal Investigations Course
- POST Homicide Investigations Course
- POST Supervisor Advanced Patrol Strategies
- Coaching Skills for Managers/Supervisors
- POST Training Managers School

PROFESSIONAL MEMBERSHIPS/AWARDS/RECOGNITION:

Scouting America Great Smoky Mountain Council: Leaders in Law Enforcement Award

Chamber of Commerce Leadership Program: Graduate of both Leadership Riverside and Leadership El Cajon programs. Class project: TEDx conference that sponsored 600 local high school students. Conference was recognized as a highlight community program of the year by The Press Enterprise.

California Association of Human Relations Organizations- CAHRO (2007 to 2015): Executive Board Member of CAHRO. Initiated state-wide convenings and training seminars for state-wide Human Relations Commissions and community-based organizations for the purposes of policy, current affairs, and outreach related to human relations topics such as Hate Crimes, legislation, grants, law enforcement training and police/community relations. Initiated the first training symposium dedicated to Police/Community Relations and Men and Boys of Color. Created several Police/Community Relations training modules for state-wide CAHRO conferences.

Patrick Crowe Community Service Award: For recognition of leadership, community service and Board of Director membership in various organizations.

Woman of Distinction – California State Assembly: For recognition of leadership in the law enforcement profession and community service.

Toastmaster of the Year – Club #6642: For recognition of superior communication skills, club leadership, and speaker competition skills in Toastmasters International.

Other professional memberships/awards/recognition:

- Collaborative Justice Courts Advisory Committee - State of California
- Western Inland Empire Coalition Against Hate- Board Member
- Chief's Advisory Board - Proctor
- LEAC Award, Excellence In Community Service
- Resolution #41, Riverside County District Attorney's Office, Family Justice Center Domestic Violence Unit
- California State Senate Resolution-Heroism
- California State Senate Resolution- Excellence in Community Service
- Chamber of Commerce Leadership Program
- California State Senate Resolution- Lifesaving
- Medal of Valor Nominee
- Police Star for Heroism
- Police Lifesaving Medal
- Gold Medal, Police Olympics- Women's Boxing

COMMUNITY SERVICE:

The Carolyn E. Wylie Center for Children: Board Member. Community services and outreach for disabled and special needs children in the areas of education, counseling services, parenting classes, and health services.
Scouting America - Volunteer/Fundraiser: Volunteer/fundraiser for 15 years. Conducted training sessions in workplace violence and domestic violence. Golden Eagle contributor. Membership Standards Committee Great Smoky Mountain Council.

Safe Alternatives for Everyone (SAFE): Volunteer, fundraiser, chaperone, and trainer for 5 years. Conduct job skills and communications training for youth. Coached boys and girls boxing and volunteer for SAFE sponsored community events.

P & R Foundation: Fundraiser for Boys and Girls Club of America.

Education/Outreach: Court certified subject-matter expert in domestic violence. Conduct education, seminar, conference training to Universities, schools, community groups, and other law enforcement agencies on domestic violence as a volunteer.

Drucilla Stills

From: Cook, Adam [redacted]
Sent: Monday, March 9, 2026 9:41 AM
To: Commission
Subject: [External]Application for Merit System Board of Directors
Attachments: Adam Cook -- Resume 2025.pdf

Please accept my attached resume. I am interested in serving on the Merit System Board of Directors. Thanks for the consideration. I look forward to potential next steps.

Adam

Adam A. Cook, CFRE

[redacted]

Dolly Parton CHILDREN'S HOSPITAL

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Adam A. Cook, CFRE

[redacted]

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SUMMARY

Senior executive in non-profit development, government relations, and foundation management known for successfully leading complex organizations and large teams while establishing strong cultures of philanthropy and community advancement. A leader who has spearheaded procurement and fund distribution for healthcare, education, and research initiatives totaling over $300 million in multiple states. A trusted advisor in finance and operations who has created several grant-making programs and endowments.

SKILLS

Advancement Strategy | Public Affairs | Government Relations | Non-profit Operations
Corporate & Foundation Relations | Community Engagement | Board Facilitation

PROFESSIONAL EXPERIENCE

CHIEF DEVELOPMENT & PUBLIC AFFAIRS OFFICER
EAST TENNESSEE CHILDREN'S HOSPITAL (Knoxville, TN) **2022 – Present**

East Tennessee Children's Hospital (ETCH) is an independent non-profit hospital exclusively focused on the health and well-being of children across the region and beyond. ETCH operates hospital services, urgent cares, primary care offices, rehabilitation sites, and a home health agency providing more than 400,000 patients encounters each year.

- Oversees all fundraising initiatives across the healthcare system ($46M to date)
  - Capital needs, operational funding, and endowment growth
- Leads system in communication strategy, campaign design, and brand management for the organization
  - Internal and external communications (website, traditional and social media, print
- Leads all local, state, and federal government affairs initiatives for the healthcare system
  - Independent relations for ETCH as well as collaborative relations with Tennessee Hospital Association (THA) and Children's Hospital Alliance of Tennessee (CHAT) to improve funding, quality, and safety
- Oversees Volunteer Services department with 300+ volunteers
  - Lead teams that provide more than 37,000 volunteer hours annually
- Advises and directs distribution of all philanthropic investment funds, endowments, and capital gifts

CHIEF DEVELOPMENT OFFICER
MERCY HEALTH (St. Louis, MO) **2019 – 2022**

Mercy Health is a large healthcare system encompassing 40 hospitals across Missouri, Oklahoma, and Arkansas

- Oversaw all fundraising initiatives for the 16 hospital foundations across the healthcare system ($225M to-date)
- Led system in strategic planning, campaign design, and brand management
  - Led comprehensive campaign, raising $167 million (145% of goal)
  - Achieved record number of 6, 7 and 8-figure gifts under my tenure (222 total gifts, 105% increase)
  - Raised $5.5 million COVID-19 related Emergency Response Fund
- Worked with 16 boards of directors to enhance philanthropic impact for better health outcomes
  - Created *RELATE*, a comprehensive training program for optimal board/staff relations
- Oversaw and directs distribution of all funds procured to best meet donor intent and community need
  - Increased annual fund distribution from $12 million to $30 million
- Managed and directed P&L operations for all foundations ($12 million annual budget)
- Supervised a senior team of 8 members with 32 additional reports respectively
- Advised and leads all grant initiatives for the health system

DIRECTOR OF COMMUNITY STRATEGY & GOVERNMENT RELATIONS
CARDINAL INNOVATIONS HEALTHCARE (Charlotte, NC) **2016 – 2019**

Cardinal Innovations Healthcare is the country's largest specialty health plan, serving Medicaid and uninsured populations with developmental needs, mental health disorders, and substance abuse concerns

- Created and ran a comprehensive $5 million community reinvestment grant program across 20 counties in NC
- Led strategic growth for government partnerships and non-profit stewardships across the state
- Partnered with local and state agencies to craft legislative agendas that improve member access to care

- Led community initiatives that grew state-wide non-profit and provider collaborations by 400%
- Led and directed all collaboration projects for mobile workforce (nearly 50% of organization)

VICE PRESIDENT OF DEVELOPMENT **2014 – 2015**
NEW HANOVER REGIONAL MEDICAL CENTER & NHRMC FOUNDATION (Wilmington, NC)

NHRMC Foundation is the charitable entity created to support New Hanover Regional Medical Center, an 855-bed non-profit tertiary medical center system based in Wilmington, NC caring for patients in southeastern NC

- Led all aspects of foundation strategy, growth, and development -- successfully improving:
  - Overall foundation profitability (57% increase) and expense management (18% reduction)
  - Funding structures (Consolidated 135 donor-advised funds)
  - Office administration (rewrote key investment/spending and fund access management polices)
- Led a 24-member board of directors
- Improved foundation employee satisfaction scores from bottom 10% to #2 in the organization
- Created endowment program to provide clinical education and outreach grants
- Served on the SouthEastern Area Health Education Center (SEAHEC) Committee, improving access and quality of health education to a rural seven-county region of NC

FOUNDATION PRESIDENT **2009 – 2014**
FOUNDATION CAMPAIGN DIRECTOR **2004 – 2009**
ATRIUM HEALTH – NORTHEAST (Concord, NC)

NorthEast Foundation is the non-profit organization established to support Atrium Health - NorthEast, a 457-bed tertiary medical center and a member of one of the largest healthcare systems in the country (Atrium Health).

PRESIDENT

- Led all aspects of the medical center foundation including: strategic planning, campaign design, staff production, board procurement and
- Led all market implementation, prospect identification, solicitation, and stewardship for the following:
  - $50 million medical center endowment and planned giving program
  - $12 million development program for research, capital expenditures, and health education needs
  - $10 million Jeff Gordon Children's Hospital Campaign (169% of goal)
  - $10 million Cabarrus College of Health Sciences Campaign (110% of goal)
  - $6 million Breast Health Center and Outreach Program Campaign (105% of goal)
- Wrote and managed select grants in excess of $7.5 million
- Managed and trained a 36-member community-led Board of Directors

CAMPAIGN DIRECTOR

- Conducted group fundraising appointments with board members and prospective donors
- Created and implemented internal employee fundraising campaign plan
- Managed Business and Industry fundraising plans
- Supervised all third-party fundraising efforts within the community
- Directed 50+ volunteers in multiple community fundraising events

FINANCIAL CENTER MANAGER **2003 – 2004**
FIRST CHARTER BANK (Concord, NC)

- Grew and retained an $84 million book of business and managed core team of 11 direct reports
- Maintained sales and service goals for deposits, loans, and investments
- Created and administered working budget for financial center

FINANCIAL SPECIALIST & RELATIONSHIP MANAGER **2000 - 2003**
FIRST UNION NATIONAL BANK (Charlotte, NC)

- Grew and retained $44 million book of business
- Led service initiatives for entire uptown Charlotte market
- Directed lending processes for commercial and retail clients

COMMUNITY INVOLVEMENT

Public Building Authority – Member of the Board of Directors, Secretary
Knoxville Area Urban League – Member of the Board of Directors
University of Tennessee Chancellor's Associates – Member
Cedar Springs Presbyterian Church -- Member

EDUCATION

University of North Carolina at Chapel Hill
Bachelor of Arts, Communication Studies, May 2000
Emphasis: Interpersonal and Organizational Communication

Selected Additional Certifications/Training:

- 2010 Certified Fund Raising Executive (CFRE)
- 2001 NASD Series 6 and 63 licenses

Knox County Commission

NOTICE

TO: MEMBERS OF THE KNOX COUNTY COMMISSION
DEPARTMENTS, AGENCIES, AND NEWS MEDIA

FROM: OFFICE OF KNOX COUNTY COMMISSION

DATE: FEBRUARY 17, 2026

The Knox County Commission shall receive letters and resumés/credentials from candidates seeking an appointment to one (1) vacancy to serve an unfulfilled term expiring September 30, 2028 on the Knox County Sheriff's Office Employees' Merit System Board of Directors. Resumés should be submitted by mail, fax, e-mail or hand-delivered no later than ***Wednesday, March 11, 2026 at 4:00 pm*** to:

Office of the Knox County Commission
Suite 603, City County Building
400 Main Street
Knoxville, TN 37902
Phone: 215-2534
FAX: 215-2038
E-mail: commission@knoxcounty.org

The Knox County Commission will interview candidates at the Commission Optional Agenda Review meeting on Monday, March 16, 2026 at 3:00 p.m. in the Main Assembly Room of the City-County Building, 400 West Main Street.

The Commission's appointment shall be considered during the regularly scheduled meeting of the Knox County Commission on Monday, March 23, 2026 at 5:00 p.m. in the Main Assembly Room of the City-County Building, 400 West Main Street.

The following provisions apply in accordance with Ordinances O-22-6-103 and O-25-9-101:

- Membership is completely voluntary, and members will receive no compensation for their service.
- The board meets quarterly, unless a special-called meeting is held.
- Applicants must be over 21 years of age; of good moral character; a citizen of the United States and the State of Tennessee; and a resident of Knox County.
- No person shall be eligible to serve as a member on the Merit System Board of Directors if they have previously been employed by the Knox County Sheriff's Office department within the five (5) calendar years preceding his/her appointment by the Commission, or if any member of such person's immediate family is or becomes employed by the Knox County Sheriff's Office at any time during such person's term of service as a member of the board council. For purposes of this section, "immediate family" shall include spouse, parent, grandparent, siblings, in-laws, or children
- Members will be required to attend an Ethics training provided by the Knox County Human Resources Department, as required of all employees of Knox County.
- The County Commission finds that the actual or apparent political influence on the members of the Merit System Board is injurious to the credibility of the board and undermines its mission as an apolitical civil service system for KCSO employees. Therefore, membership on the Merit System Board shall be conditioned upon the following:
    - No person holding a position on the Merit System Board shall take an active part in any political campaign while a member of the Merit System Board.
    - No member of the Merit System Board shall solicit money for political campaigns.
    - No member of the Merit System Board shall make any public endorsement of any candidate in any campaign for elected office.
    - A member of the Merit System Board shall not use such position to reflect the member's personal political feelings as those of the Sheriff's department or to exert any pressure on anyone to influence that person's political views.
    - No member of the Merit System Board shall display any political advertising or paraphernalia on such person's body or automobile while conducting business on behalf of the Merit System Board. However, nothing in this part shall be construed to prohibit or prevent any such employee Board Member from becoming or continuing to be a member of a political club or organization and enjoying all the rights and privileges of such membership or from attending any political meetings while not on duty. Such employee Board Member shall not be denied freedom in the casting of a vote.
    - During a Merit System Board Member's term of service, should that Member take active steps toward becoming a political candidate, such member shall immediately resign from the Board of Directors.

RLA-17592 **O-26-3-101**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COUNTY COMMISSION

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of an Ordinance of the Commission of Knox County, Tennessee, repealing Section 58-1 of the Knox County Code regarding Vehicle Registration Fees. (Ord. No. O-03-5-101, adopted 6-23-03; Ord. No. O-04-5-101(A), adopted 6-28-04; Ord. No. 09-2-101, adopted 3-23-09; Ord. No. O-19-8-101, adopted 9-23-19; and Ord. No. O-19-9-101, adopted 10-28-19) **(FIRST READING) (DEFERRED FROM AUGUST 2025 AT REQUEST OF FULL COMMISSION)** ***(REQUIRES 2/3 VOTE)***

(Commissioner Jay and County Mayor)

Attachments

Ordinance

Fiscal Note

Presentation - Wheel Tax

ORDINANCE

AN ORDINANCE OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, REPEALING SECTION 58-1 OF THE KNOX COUNTY CODE REGARDING VEHICLE REGISTRATION FEES. (Ord. No. O-03-5-101, adopted 6-23-03; Ord. No. O-04-5-101(A), adopted 6-28-04; Ord. No. O-09-2-101, adopted 3-23-09; Ord. No. O-19-8-101, adopted 9-23-19; and Ord. No. O-19-9-101, adopted 10-28-19)

ORDINANCE: **O-26-3-101**

REQUESTED BY: **COMMISSIONER JAY & COUNTY MAYOR**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED 1ST READING: _____
DATE

APPROVED 2ND READING: _____
DATE

APPROVED EMERGENCY: _____
(YES) (NO)

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____PAGE_____

WHEREAS, in 2003, the Knox County Commission adopted a $6 vehicle registration fee for Knox County residents; and

WHEREAS, in 2004, that fee was raised to $36; and

WHEREAS, it is the position of Knox County Commission that citizens should not have to pay a extra fees "For the privilege of using the public roads and highways in the county…" as written in Sec. 58-1 of the Knox County Code; and

WHEREAS, the Knox County Commission recognizes when the "Wheel Tax" was introduced to the public over two decades ago, it was presented that the proceeds from this privilege tax would be allocated to several civic projects that were not delivered as promised; and

WHEREAS, it is the sense of the Knox County Commission that this tax is unfair to the citizens of Knox County who are paying as a result a significantly higher fee to register their vehicle than is the case in surrounding counties, and places Knox County at a competitive disadvantage compared to those counties; and

WHEREAS, it is further the sense of the Knox County Commission that this tax is regressive and impacts low-income people disproportionally.

NOW THEREFORE BE IT ORDAINED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

SECTION 1. Knox County Code §58-1(a) is amended by striking the term "$36.00" and substituting therefore the term "$32.00", effective July 1, 2026.

SECTION 2. Knox County Code §58-1(a) is amended by striking the term "$32.00" and substituting therefore the term "$24.00", effective July 1, 2027.

SECTION 3. Knox County Code §58-1(a) is amended by striking the term "$24.00" and substituting therefore the term "$16.00", effective July 1, 2028.

SECTION 4. Knox County Code §58-1(a) is amended by striking the term "$16.00" and substituting therefore the term "$8.00", effective July 1, 2029.

SECTION 5. Knox County Code §58-1 is repealed in its entirety effective July 1, 2030.

SECTION 6. Any program or department currently funded by the Wheel Tax shall, after this ordinance takes effect, be funded from other revenue sources within Knox County's annual budget.

SECTION 7. This Ordinance shall have no effect unless it is approved by a two-thirds vote of the Knox County Commission at two regularly scheduled meetings.

SECTION 8. This Ordinance shall take effect as provided by the Charter of Knox County, Tennessee, the public welfare requiring it. Effective July 1, 2030, the Knox County Clerk is directed to no longer collect any vehicle registration fee not mandated by Tennessee state statute.

Presiding Officer of the Commission **Date**

County Clerk **Date**

Approved: _____
County Mayor **Date**

Vetoed: _____
County Mayor **Date**

FISCAL NOTE

Ordinance O-26-3-101

CAPTION:

AN ORDINANCE OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, REPEALING SECTION 58-1 OF THE KNOX COUNTY CODE REGARDING VEHICLE REGISTRATION FEES.

FISCAL IMPACT ANALYSIS (PURSUANT TO SEC. 1-11 OF THE KNOX COUNTY CODE):

This ordinance would reduce the wheel tax revenue on July 1st of each of the next five years (2026-2030), by the amounts listed below and is intended to be covered by natural growth. The total amount, over the five fiscal years, is $15,498,000.

- July 1, 2026 - $1,722,000
- July 1, 2027 - $3,444,000
- July 1, 2028 - $3,444,000
- July 1, 2029 - $3,444,000
- July 1, 2030 - $3,444,000

Chris Caldwell, Chief Financial Officer



Presented to the Knox County Commission

Commissioner Larsen Jay

(Revised February 28, 2026)

At-Large, Seat 10

REASONS TO REPEAL THE WHEEL TAX

Double Taxation

The citizens of Knox County are being taxed for the “privilege” of using the public roads they’ve already paid for with their property and sales taxes.

Promises Made, Yet Not Delivered

The wheel tax was primarily sold to the public to fund a new downtown library, yet it was never built.
If the government promises to do something with a special tax, it should deliver on it - or take the tax away.

Uncompetitive For Knox County Businesses

Six of the eight neighboring counties do not have a wheel tax,
further incentivizing people to shop for automobiles outside of Knox County.

A Wheel Tax Is A Regressive Tax

Wheel taxes are regressive and imposes a higher percentage burden of taxation on lower-income earners than on higher-income earners.

From Knox County Municipal Code: Chapter 58 / TAXATION: ARTICLE 1. – IN GENERAL: Section 58-1

Sec. 58-1. - Motor vehicle registration fee.

(a) For the privilege of using the public roads and highways in the county, there is levied upon motor-driven vehicles, and upon the privilege of the operation thereof, except motor-driven bicycles and scooters, farm tractors, self-propelled farm machines not usually used for operation upon public highways or roads, and motor-driven vehicles owned by any governmental agency or governmental instrumentality and except for other exemptions provided by general law, a special privilege tax for the benefit of such county, which tax shall be in the amount of $36.00 for each such motor-driven vehicle, the owner of which resides within said county.

This tax applies to, is a levy upon, and shall be paid on each motor-driven vehicle, the owner of which resides within said county.

WHEEL TAX INTRODUCTION WAS CONTROVERSIAL & TIED TO CIVIC PROMISES



OPINION: INSIGHTS

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INSIGHTS

Averting Atrophy in Knox County

by Joe Sullivan

Comment on this story

With the benefit of hindsight, it's easy to conclude that County Mayor Mike Ragsdale erred by basing his Knox County budget on a wheel tax increase that was subject to repeal by referendum. Neither Ragsdale nor the County Commission majority that approved a $30 wheel tax increase by a 16-3 vote in June foresaw the groundswell of opposition that manifested itself in the 25,000 signatures on a petition for a Nov. 2 referendum that seems virtually assured.

Now Ragsdale faces the daunting challenge of getting voters to approve a tax increase which is akin to making water run uphill. But without the $12 million in new revenue from the wheel tax, Knox County is destined to go downhill in its funding of much-needed community improvements and services too numerous to name here.

Ragsdale's initial parry has been to submit to County Commission his recommendations for county budget cuts if the $12 million in new revenues is not forthcoming. The cuts would eliminate some 30 capital projects that would bring benefits to every section of the county. Grants to more than 100 not-for-profit organizations that have relied on the county for support for many years would be cut in half. And Ragsdale would impose a 2 percent reduction in the budgets of every component of county government except for schools. Readers should carefully consider the impacts of all of these cuts as listed on the county's website (knoxcounty.org).

Topping the list is the $40 million (later reduced to $25 million) that Ragsdale had recommended for a new main library that would adorn downtown. The deficiencies, spacewise and otherwise, of the 30-year-old Lawson McGhee Library are apparent to its patrons, but evidently there are not enough of them to carry much political weight. In the farther reaches of the county, where most residents seem to identify with their own branch library (of which there are 17 altogether), opposition to spending $40 million on a new downtown library is predominant. Indeed, it may well have been the primary impetus for the success of the call for a wheel tax referendum. And County Commission went further than the county mayor by voting last week to kill the $40 million undertaking regardless of the referendum's outcome.

[illegible] and the school board start pulling [illegible] done so, a comprehensive school [illegible] addresses needs in all sectors of the county should be [illegible] allaying the perception elsewhere that the affluent western suburbs are getting all of the attention. Center city dwellers should recall that a decade ago suburbanites uncomplainingly paid a big share of the cost of what were then the community's most pressing high school needs: namely, the $30 million renovations of Fulton and Austin-East.

With election day only two months off, time is of the essence, And Ragsdale needs to start exerting the same kind of positive leadership that former city Mayor Victor Ashe did when he won voter approval for a local sales tax increase in a 1988 referendum.

September 2, 2004 • Vol. 14, No. 38
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News Sentinel G

PERSPECTIVE

TWO SIDES OF AN ISSUE

Should the wheel tax roll?

Wheel tax would help diversify county revenue sources

NO: Citizens being 'blackmailed' by wheel-tax issue

THE DAILY BEACO

The editorially independent student newspaper of The University of

News Arts & Culture Identity Opinion Sports About Advertise

Wheel tax drives car owners' rage

By Christina Connelly Jul 2, 2004

In a 16-3 vote, Knox County commissioners approved a $30 wheel tax increase June 28, which will potentially generate an additional $12 million of revenue for Knox County.

"Any time they have to raise any tax or fee or anything where people don't have a choice about paying, there's going to be some frustration that goes with that," said Mike Cohen, Knox County senior director of government relations. "We need to create more jobs, grow the per capita earning and move Knox County forward. If we could have pursued the agenda, we believe we need to pursue for Knox County without raising the wheel tax we would have done it, but it simply wasn't possible."

Although the $12 million has not been designated to a particular project, it will most fund increased earnings for teachers, expanded parks, improvements for county schools and a new library, said Cohen.

Although the Knox County commissioners feel that the money is necessary to implement much needed improvements in Knox County, not all resident are happy about the tax increase.

Led by Knox County resident Gary Sellers, a group of residents are now petitioning against the wheel ta increase, arguing that the public should have had a chance to vote on the tax increase before the Knox County Commission approved it.

"This is not a done issue yet. We had no say in this," Sellers said. "We tried to talk to commissioners get them to not approve it and they didn't listen, so this is our only response."

In order for the issue to be reconsidered by county commissioners in November, 12,000 Knox Coun registered voters must sign the petition by July 28.

Cohen said he feels the wheel tax is an unfair, because it will have a greater impact on lower inco families.

"The burden is born more by one group than another group," said Paul Campbell, UT professor work. "I think it is a regressive tax, but I don't see that as important."

According to Cohen the increased funding would have been raised in another way had the wh been implemented.

"If for some reason this effort to repeal the wheel tax took effect we would simply turn around a property tax increase to make up the difference." Cohen said.

Knox County commissioner Billy Tindell (District 2b) said the alternative property tax increa have been easier on Knox county residents.

"If we hadn't done it we would have had to cut $12 million out of the budget somewhere." Tinde property tax goes up it's passed to the renter. I'm not sure that it's any more regressive than a property tax."

Residents who have a renewal in July can bypass the wheel tax increase by paying before July 13, when the wheel tax officially goes into effect.

LETTERS TO THE EDITOR

Wheel tax is backdoor effort to make poor pay

What we are being misled on with the wheel tax are the numbers. How can it be that there are only 400,000 vehicles in the county? Just about everyone I know has two to four vehicles. Furthermore, if the wheel tax were $30, then the median home property tax would go up $60 to get the same revenue.

So why is it that the property tax goes up less than the implied $60? Think a bit; it's not too hard. The property tax includes businesses — the largest property taxpayers.

So the wheel tax is a backdoor way to tax the poor and protect the business. Let's all be honest and understand what we are voting on.

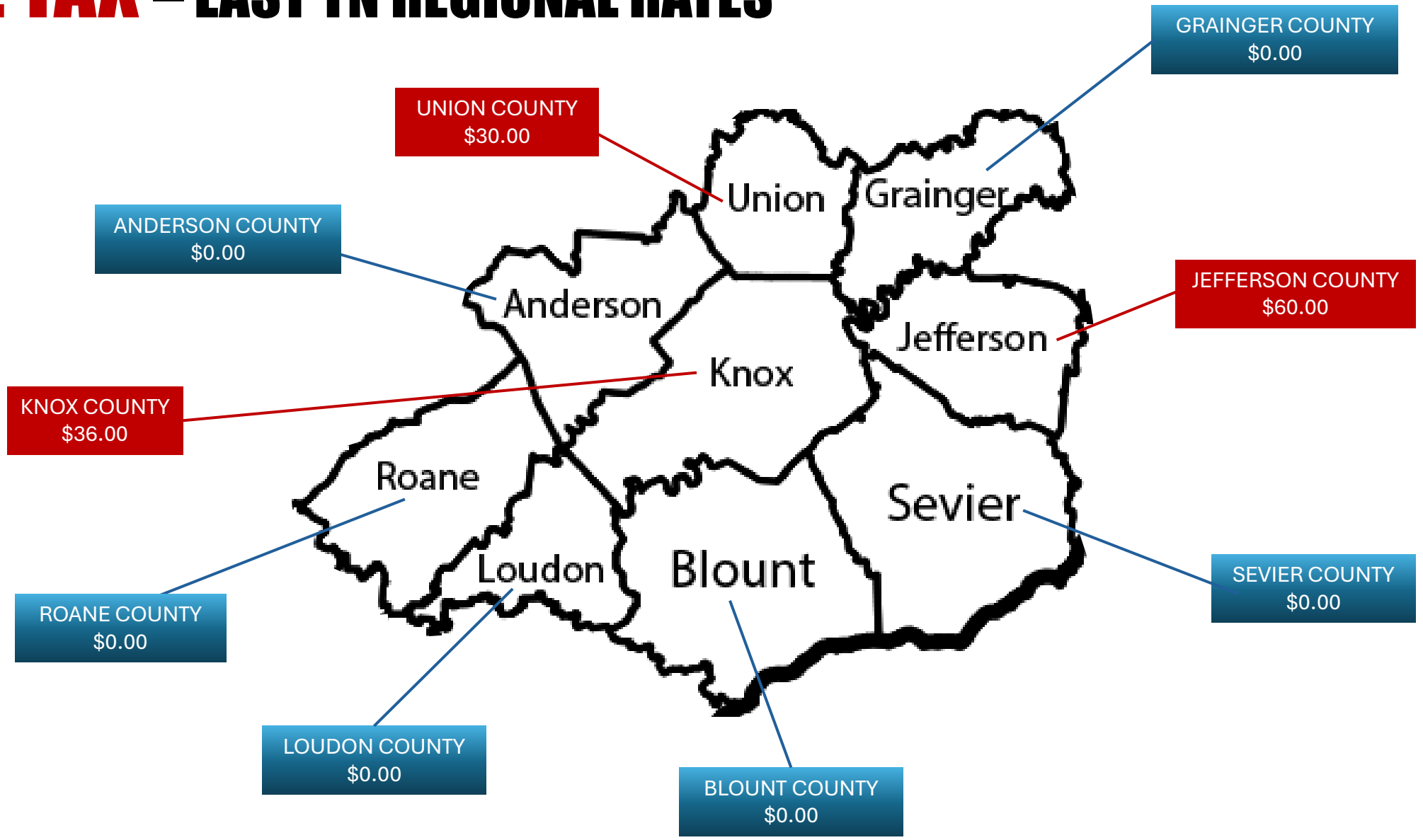
If you are pro-business and think the poor don't pay their fair share of taxes, then vote for the wheel tax.

If you're like me and believe we are already paying too much tax and that government needs to spend less, then vote down the wheel tax and lobby your county commissioners to uphold their promise of no more taxes.

RUDY ESCHER
Knoxville

WHEEL TAX – EAST TN REGIONAL RATES

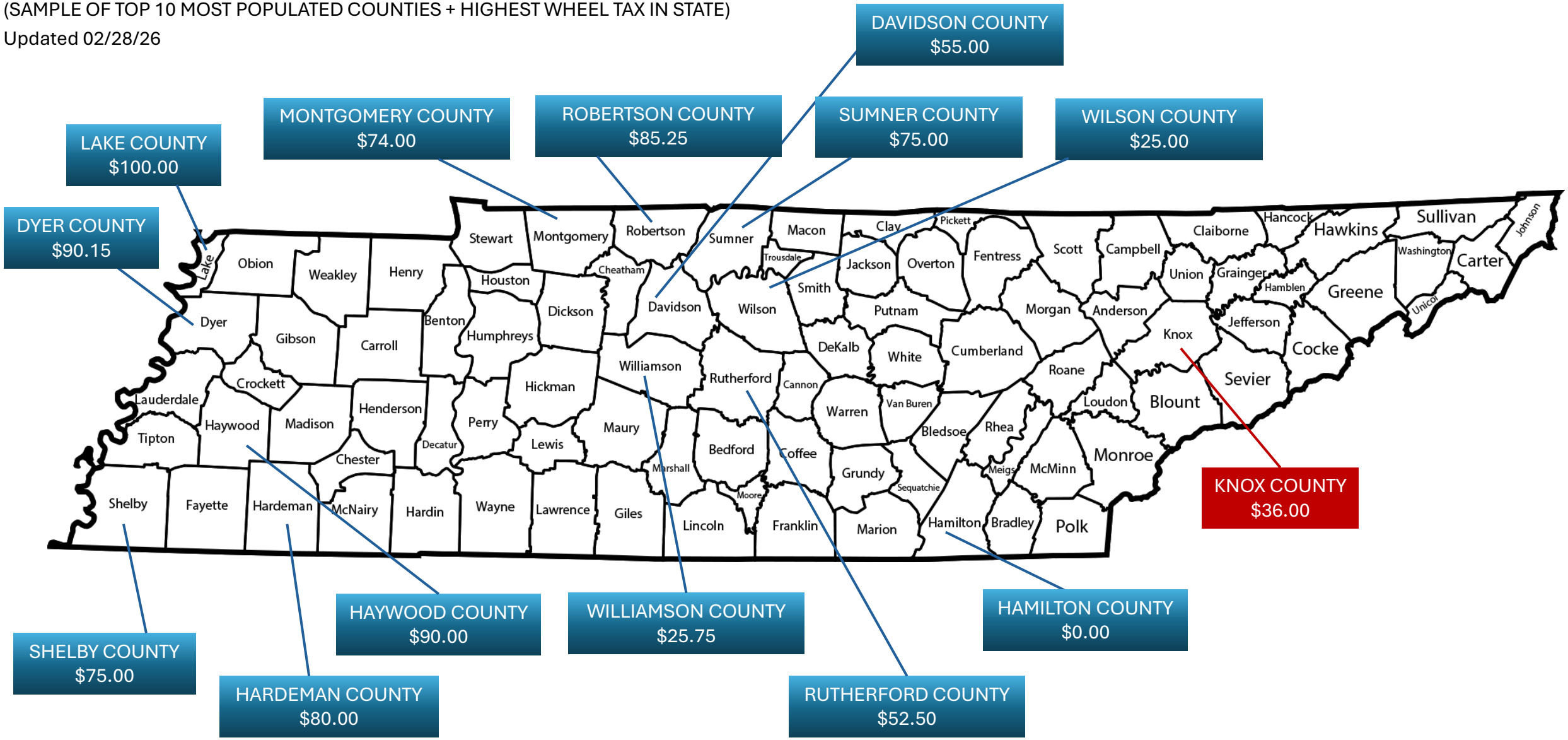
Updated 02/28/26



WHEEL TAX – STATE RATES

(SAMPLE OF TOP 10 MOST POPULATED COUNTIES + HIGHEST WHEEL TAX IN STATE)

Updated 02/28/26



WHEEL TAX REPEAL ORDINANCE BREAKDOWN

Phased-Out Approach Over 5 Years

In consideration of the annual financial needs of Knox County,
it is proposed to phase out the Wheel Tax fee of $36.00 over a five-year period
beginning with the FY'27 budget with a full repeal in FY'31.

FY'27 (July 1, 2026 – June 30, 2027)	-$4.00	Wheel Tax = $32.00
FY'28 (July 1, 2027 – June 30, 2028)	-$8.00	Wheel Tax = $24.00
FY'29 (July 1, 2028 – June 30, 2029)	-$8.00	Wheel Tax = $16.00
FY'30 (July 1, 2029 – June 30, 2030)	-$8.00	Wheel Tax = $08.00
FY'31 (July 1, 2030 – June 30, 2031)	-$8.00	Wheel Tax = $00.00

Keeps Current Funding Levels for Core Services

The ordinance directs Knox County to fund the services
currently being supported by the Wheel Tax – **at their current levels** – only allocated / budgeted within
the General Fund budget.

WHEEL TAX – 5 YEAR PHASED OUT APPROACH / FINANCIALS

(Source: Knox County Finance, FY'26 Adopted Budget)

Wheel Tax Revenue

Fund	FY'24 Actuals	FY'25 Actuals	FY'26 Budget
General	607,980	632,732	620,000
Public Library	12,576,931	13,088,960	13,050,000
General Purpose Schools	912,721	949,879	-
EPW	914,222	951,441	1,825,000
Totals	15,011,854	15,623,012	15,495,000

Adopted FY'26 Knox County Budget = $1,118,995,156

% of Knox Co. FY'26 Budget

Full Repeal of Wheel Tax ($15,495,000) *= 01.38 %*

Proposed FY'27 (-$4) Repeal of Wheel Tax (-$1,721,667) = 00.15 %

Proposed FY'28 (-$8) Repeal of Wheel Tax (-$3,443,334) = 00.31 %

Proposed FY'29 (-$8) Repeal of Wheel Tax (-$3,443,334) = 00.31 %

Proposed FY'30 (-$8) Repeal of Wheel Tax (-$3,443,334) = 00.31 %

Proposed FY'31 (-$8) Repeal of Wheel Tax (-$3,443,334) = 00.31 %

The percentage of the annual Knox County budget is likely to be lower if the overall budget amount increases at a higher growth rate (which is likely).

RLA-18125 **O-26-2-101**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COUNTY COMMISSION

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Consideration of an Ordinance of the Commission of Knox County, Tennessee, to repeal Knox County Code Sections 18-141 and 18-142 relative to the operation of the East Tennessee Regional Juvenile Service Center and adopting new Sections 18-141 and 18-142 to place the control and supervision of the Juvenile Service Center under the Knox County Juvenile Court Judge and to create an Advisory Board. **(SECOND READING)** *(Juvenile Service Center Board of Directors)*

Attachments

Ordinance

Fiscal Note

ORDINANCE

AN ORDINANCE OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, TO REPEAL KNOX COUNTY CODE SECTIONS 18-141 AND 18-142 RELATIVE TO THE OPERATION OF THE EAST TENNESSEE REGIONAL JUVENILE SERVICE CENTER AND ADOPTING NEW SECTIONS 18-141 AND 18-142 TO PLACE THE CONTROL AND SUPERVISION OF THE JUVENILE SERVICE CENTER UNDER THE KNOX COUNTY JUVENILE COURT JUDGE AND TO CREATE AN ADVISORY BOARD.

ORDINANCE: **O-26-2-101**

REQUESTED BY: **JUVENILE SERVICE CENTER BOARD OF DIRECTORS**

PREPARED BY: **KNOX COUNTY LAW DIRECTOR'S OFFICE**

APPROVED AS TO FORM AND CORRECTNESS:_____
DIRECTOR OF LAW

APPROVED 1ST READING: _____
DATE

APPROVED 2ND READING: _____
DATE

APPROVED EMERGENCY: _____
(YES) (NO)

VETOED:_____
DATE

VETO OVERRIDE:_____
DATE

MINUTE BOOK_____**PAGE**_____

WHEREAS, the Knox County Commission (the "Commission") previously adopted Ordinances to place the operation and control of the East Tennessee Regional Juvenile Service Center under the Knox County Sheriff beginning on July 1, 2026; and

WHEREAS, the Knox County Juvenile Service Center Board of Directors, at their duly noticed public meeting on January 13, 2026, determined by unanimous vote to recommend to the Commission a new governance and operating model for the East Tennessee Regional Juvenile Service Center; and

WHEREAS, the Juvenile Service Center Board of Directors recommended that the facility and operations of the East Tennessee Regional Juvenile Service Center be placed under the control and supervision of the Juvenile Court Judge commencing on April 1, 2026 and that a new Advisory Board be created; and

WHEREAS, the Commission finds the recommendations of the Juvenile Service Center Board of Directors to be in the best interests of the citizens of Knox County to bring long-term stability, accountability and transparency to the East Tennessee Regional Juvenile Service Center.

NOW THEREFORE BE IT ORDAINED BY THE COMMISSION OF KNOX COUNTY AS FOLLOWS:

SECTION 1. The Code of Knox County, Tennessee is hereby amended by repealing Knox County Code Sections 18-141 and 18-142 relative to the operation of the East Tennessee Regional Juvenile Service Center.

SECTION 2. The Code of Knox County, Tennessee is hereby further amended in Chapter 18, Article IV, Division 2 to read as follows:

DIVISION 2. EAST TENNESSEE REGIONAL JUVENILE SERVICE CENTER

Sec. 18-141. – East Tennessee Regional Juvenile Service Center.

The East Tennessee Regional Juvenile Service Center is hereby placed under the control and supervision of the Knox County Juvenile Court Judge commencing on April 1, 2026. The Juvenile Court Judge shall have the authority to manage all staffing decisions, including the hiring, firing, reprimanding, etc. of employees with support from the Knox County Human Resources Department. The Juvenile Court Judge is authorized to negotiate contracts and agreements with the Tennessee Department of Children's Services, Tennessee Commission on Children & Youth, and/or other regional counties for housing and supervision of juveniles. Oversight and compliance of the East Tennessee Regional Juvenile Service Center remains with the Tennessee Department of Children's Services and the Tennessee Commission on Children & Youth. The Knox County Juvenile Court Judge operating in his/her capacity as director of the East Tennessee Regional Juvenile Service Center is considered

to be a county employee for purposes of the Government Tort Liability Act and is entitled to all legal services and indemnification which apply to other Knox County employees and elected officials.

Sec. 18-142. – Advisory Board.

(a) ***Created*****. There is hereby created an Advisory Board for the East Tennessee Regional Juvenile Service Center starting July 1, 2026.**

(b) ***Composition.*** **The Advisory Board shall be composed of seven (7) members as follows: two (2) appointees by the Knox County Mayor with at least one of whom shall be a representative from the Knox County Health Department; one (1) citizen of Knox County, who is not a Knox County employee, and has professional expertise in Juvenile Mental Health; one (1) citizen of Knox County, who is not a Knox County employee, and has professional expertise in Juvenile Social Services; one (1) citizen of Knox County, who is not a Knox County employee, and has professional expertise in Juvenile Legal Systems; one (1) citizen of Knox County who is not a Knox County employee; and one (1) Knox County Commissioner appointed by the Commission Chair. All citizen members not appointed by the Knox County Mayor shall be appointed by the Juvenile Court Judge. All member appointments to the Advisory Board shall be confirmed by the Knox County Commission.**

(c) ***Terms.*** **The terms of citizen board members shall be three (3) years, eligible to serve a total of two consecutive terms. The terms of the County Commissioner and Mayoral appointees shall be two (2) years, eligible to serve a total of two consecutive terms. Vacancies shall be filled in the same manner as the original appointment for the remaining unexpired portion of the term. Advisory Board member terms may be shortened for staggered-term purposes and healthy turnover, and shall be outlined in the governing bylaws.**

(d) ***Meetings*****. The Advisory Board shall meet quarterly, remain open to the public, and be publicly noticed.**

SECTION 3. The current Juvenile Service Center Board of Directors shall prepare governance documents for the new Advisory Board before the transition date of April 1, 2026. Effective April 1, 2026, the Juvenile Service Center Board of Directors shall sunset and no longer meet.

SECTION 4. This Ordinance shall take effect upon passage, as provided by the Charter of Knox County, Tennessee, the public welfare requiring it.

~~**Presiding Officer of the Commission Date**~~

_____
County Clerk Date

Approved:_____
County Mayor Date

Vetoed:_____
County Mayor Date

FISCAL NOTE

Ordinance O-26-2-101

CAPTION:

AN ORDINANCE OF THE COMMISSION OF KNOX COUNTY, TENNESSEE, TO REPEAL KNOX COUNTY CODE SECTIONS 18-141 AND 18-142 RELATIVE TO THE OPERATION OF THE EAST TENNESSEE REGIONAL JUVENILE SERVICE CENTER AND ADOPTING NEW SECTIONS 18-141 AND 18-142 TO PLACE THE CONTROL AND SUPERVISION OF THE JUVENILE SERVICE CENTER UNDER THE KNOX COUNTY JUVENILE COURT JUDGE AND TO CREATE AN ADVISORY BOARD.

FISCAL IMPACT ANALYSIS (PURSUANT TO SEC. 1-11 OF THE KNOX COUNTY CODE):

The initial cost would remain the same. Future costs are indeterminable until we know whether the Juvenile Court Judge plans to make any changes.

Chris Caldwell, Chief Financial Officer

RLA-18259 **49.**

COMMISSION

Meeting Date: 03/23/2026

Requested By: Drucilla Stills, COUNTY COMMISSION

Department: COUNTY COMMISSION

Requires Expenditure of Funds: Funded in Current Budget:

Appropriation Required:

Information

CAPTION

Proclamation for Day of Hope in Knox County. **(TO BE ADDED)**

(Commissioner Frazier)

Attachments

Proclamation

Proclamation - Plain Font

Proclamation of the Knox County Commission

By Order of the
Knox County Commission
it is hereby proclaimed:

KNOX COUNTY DAY OF HOPE

Be it known that Knox County
Commissioner Kim Frazier does hereby honor
and recognize Day of Hope in Knox County

WHEREAS, Knox County recognizes that individuals, families, and communities across our county are impacted by behavioral health challenges, including substance use and mental health concerns, which affect people of all ages, backgrounds, and walks of life; and

WHEREAS, hope is a powerful force that fosters healing, resilience, and restoration, and is strengthened through faith, connection, compassion, and community support; and

WHEREAS, Knox County is home to dedicated behavioral health providers, recovery organizations, faith communities, nonprofits, educators, first responders, and community leaders who work collaboratively to prevent harm, provide care, and support long-term recovery; and

WHEREAS, people with lived experience of mental health and substance use challenges are living proof that recovery is possible and are courageously using their stories to bring encouragement, understanding, and hope to others; and

WHEREAS, faith-based and community-driven partnerships play a vital role in meeting people where they are, restoring dignity, strengthening families, and reminding every person that they are seen, valued, and not alone; and

WHEREAS, Knox County affirms that hope lives here in our neighborhoods, our families, our places of worship, our recovery communities, and in every person willing to stand in the gap for one another; and

NOW, THEREFORE, I, Kim Frazier, Commissioner of Knox County, do hereby proclaim March 10, 2026, as **"Day of Hope"** in Knox County, Tennessee, and encourage all residents to join together in promoting hope, reducing stigma, supporting recovery, strengthening faith and community collaboration, and affirming that hope is for every person, every family, and every community. This proclamation will be effective immediately, the public welfare requiring it.

Kim Frazier

KIM FRAZIER

Let all within reach of this Proclamation heed its directives.
By order of the Knox County Commission

Proclamation of the Knox County Commission

By Order of the
Knox County Commission
it is hereby proclaimed:

KNOX COUNTY DAY OF HOPE

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Commissioner Kim Frazier does hereby honor
and recognize Day of Hope in Knox County

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WHEREAS, people with lived experience of mental health and substance use challenges are living proof that recovery is possible and are courageously using their stories to bring encouragement, understanding, and hope to others; and

WHEREAS, faith-based and community-driven partnerships play a vital role in meeting people where they are, restoring dignity, strengthening families, and reminding every person that they are seen, valued, and not alone; and

WHEREAS, Knox County affirms that hope lives here in our neighborhoods, our families, our places of worship, our recovery communities, and in every person willing to stand in the gap for one another; and

NOW, THEREFORE, I, Kim Frazier, Commissioner of Knox County, do hereby proclaim March 10, 2026, as **"Day of Hope"** in Knox County, Tennessee, and encourage all residents to join together in promoting hope, reducing stigma, supporting recovery, strengthening faith and community collaboration, and affirming that hope is for every person, every family, and every community. This proclamation will be effective immediately, the public welfare requiring it.

Kim Frazier

KIM FRAZIER

Let all within reach of this Proclamation heed its directives.
By order of the Knox County Commission