REQUEST FOR PROPOSALS

Region IX Education Cooperative

Preschool Development Grant (PDG) Birth to 5
Early Learning Leadership Development

NIGP Commodity Code: 91838

RFP# 20019

ISSUED February 10, 2020
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I. INTRODUCTION

A. PURPOSE OF THIS REQUEST FOR PROPOSALS

Region IX Education Cooperative on behalf of Children, Youth and Families Department (CYFD) is soliciting proposals from highly qualified individuals or organizations to develop and deliver training to build leadership capacity for early learning stakeholders. This work will be conducted as part of the Preschool Development Grant Birth -5 (PDG B-5) in order to build a strong early learning system for children birth to five and their families. For more information regarding New Mexico’s PDG B-5 work please see https://www.earlylearningnm.org/pdg-b-5

The vision of the PDG B-5 is that:
Each and every child, prenatal to age five, and their families in New Mexico will have equitable access to quality early learning opportunities to support their development, health and well-being ensuring they are ready to succeed in kindergarten and beyond.

All information regarding this RFP can be found at www.rec9nm.org/Employment_Opportunities under the Requests for Proposals section.

B. SUMMARY SCOPE OF WORK

The Scope of Work includes the following activities and deliverables:

1. Develop and deliver training and best practices to early learning stakeholders throughout the state. The training should be tailored to meet the needs of participants of three specific cohorts: Local Cohorts, Higher Education Cohort and Statewide Cohorts.

   Approximately seven (7) Local Cohorts which will include early learning staff, community leaders, local policy makers, administrators of early learning provider agencies, families and other local agencies interested in building capacity in their communities.

   One (1) Higher Education Cohort which will include faculty and students.

   Approximately three (3) Statewide Cohorts which will include state early learning staff, key stakeholders, policy-makers, state PDG leadership team and other state-level early childhood stakeholders.

The PDG B-5 Leadership Team, ELAC, other designated agencies and contract awardee will collaboratively determine the Cohort members based on engagement and contributions during the Needs Assessment and Strategic Planning community forums held throughout the state over the past six months.

   Training topics are likely to include: i) early learning systems; ii) forming local early learning collaboratives/councils; iii) coalition building; iv) policy making, budgeting and appropriations; v) facilitation; vi) advocacy; vii) systems and strategic thinking; viii) collaboration skills including engaging new stakeholders; ix) communication strategies, and other identified topics.

   Outcomes: Increase awareness of early learning services by stakeholders, and to increase the capacity of programs, advocates, and families to implement local collaborative partnerships aimed at improving early learning outcomes.
This RFP may result in a single or multiple contractual award(s) between the two parties (awarded Offeror and Region IX Education Cooperative). The contract(s) will be implemented until June 30, 2020. The contract may be extended for up to three (3) years in one-year increments for a total of four (4) years, contingent upon sufficient funding and satisfactory work performance provided by the selected vendor. In no case will the contract, including all renewals thereof, exceed a total of four (4) years in duration, as set forth in NMSA 1978, § 13-1-150. A contract awarded as a result of this RFP is contingent upon appropriation by the New Mexico Legislature or other funding sources for the period of this RFP, satisfactory contract compliance, and the Contractor’s ability to successfully provide services. Should contract non-compliance be determined, the contract may be terminated or amended. A potential offeror or the Offeror agrees to comply with state laws and rules pertaining to workers’ compensation insurance coverage for its employees. If offeror fails to comply with the Workers’ Compensation Act and applicable rules when required to do so, the contract may be canceled effective immediately.

C. PROCUREMENT AND CONTRACT CONTACT

Region IX Education Cooperative will manage all aspects of procurement whose name, address, telephone number and e-mail address are listed below:

Procurement Coordinator:
Name: Region IX Education Cooperative
   Kim King
Address: 143 El Paso Rd., Ruidoso, NM  88345
Telephone: (575) 257-2368
Fax: (575) 257-2141
Email: kim.king@regionix.org

Any inquiries or requests regarding this procurement should be submitted, in writing, to the Region IX Education Cooperative, Procurement Coordinator listed above. Offerors may contact ONLY Region IX Education Cooperative, Procurement Coordinator regarding this procurement. Other state employees or Evaluation Committee members do not have the authority to respond. Protests of the solicitation or award must be delivered by mail to the Region IX Protest Manager. ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule and this Request for Proposals. Emailed protests will not be considered as properly submitted nor will protests delivered to Region IX Education Cooperative, Procurement Coordinator be considered properly submitted.

Protest Manager:
Name: Carmen Spann
   Chief Procurement Officer
Address: 143 El Paso Rd., Ruidoso, NM  88345
Telephone: (575) 257-2368
Fax: (575) 257-2141

D. DEFINITION OF TERMINOLOGY

This section contains definitions that are used throughout this procurement document, including appropriate abbreviations.

1. “Agency” means Region IX Education Cooperative.
2. "Close of Business" means 5:00 PM Mountain Standard or Mountain Daylight Time, whichever is in effect on the date given.
3. "Contract" means any agreement for the procurement of items of tangible personal property, services or construction derived from an ITB or RFP.
4. "Contract Manager" means the individual selected by the Agency to monitor and manage all aspects of the contract resulting from this RFP.
5. "Contractor" means an employer contracting with the State of New Mexico, which employer has, had, or anticipates having six (6) or more employees who worked, are working, or are expected to work an average of at least twenty hours per week over a six-month period, with said six month period being at any time during the year prior to seeking the contract(s) with the State, or any time during the term of the contract(s) with the State.
6. "Deliverable" means any measurable, tangible, verifiable outcome, result, or item that must be produced to complete a project or part of a project.
7. "Department of Information Technology" means the New Mexico Department of Information Technology which is responsible for operating the data center and all communications related items.
8. "Desirable" the terms "may," "can," "should," "preferably," or "prefers" identify a desirable or discretionary item or factor (as opposed to "mandatory").
9. "Determination" means the written documentation of a decision of a procurement manager including findings of fact supporting a decision. A determination becomes part of the procurement file to which it pertains.
10. "DFA" means the Department of Finance and Administration for the State of New Mexico.
11. "DFA/CRB" means the Contracts Review Board of the Department of Finance and Administration for the State of New Mexico.
12. "Employer" means any for-profit or not-for-profit business, regardless of location, that employs one or more persons that qualify as a "New Mexico Employee". (See below.) Such definition does not include governmental entities.
13. "Evaluation Committee" means a body appointed by the Agency management to perform the evaluation of offeror proposals.
14. "Evaluation Committee Report" means a report prepared by the Procurement Manager and the Evaluation Committee for submission for contract award that contains all written determinations resulting from the conduct of a procurement requiring the evaluation of competitive sealed proposals.
15. "Finalist" is defined as an offeror who meets all the mandatory specifications of the Request for Proposal and whose score on evaluation factors is sufficiently high to qualify that offeror for further consideration by the Evaluation Committee.
16. "Mandatory" The terms "must," "shall," "will," "is required," identify a mandatory item or factor (as opposed to "desirable"). Failure to meet a mandatory item or factor will result in the rejection of the offeror’s proposal.
17. "Milestone" means a significant event in a project, usually the completion of a major deliverable.
18. "New Mexico Employee" means any resident of the State of New Mexico, performing the majority of their work within the State of New Mexico, for any employer regardless of the location of the employer’s office or offices.
19. "Offer" means to make available to all New Mexico employees, without unreasonable restriction, enrollment in one or more health coverage plans and to actively seek and encourage participation in order to achieve the goals of the Executive Order. This could include State publicly financed public health coverage programs such as Insure New Mexico!
20. "Offeror(s)" is any person, corporation, or partnership who chooses to submit a proposal.
21. "Procurement Manager" means the person or designee authorized by the Agency to manage or administer a procurement requiring the evaluation of competitive proposals.
22. "Request for Proposals" or "RFP" means all documents, including those attached or incorporated by reference, used for soliciting proposals.
23. "Requirements" are obligatory and mean the system functions that are related to the organization’s goals and business opportunities. Requirements are defined by the project team and are usually prioritized.
24. "Responsive Offer or Responsive Proposal" means an offer or proposal that conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to, price, quality, quantity or delivery requirements.
25. "Responsible Offeror" means an offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources production, or service facilities, personnel, service reputation, and experience are adequate to make satisfactory delivery of the services or items of tangible personal property described in the proposal.
26. “Solicited and Awarded” means an ITB or RFP was made available to the general public, through any means, after January 1, 2012 AND the contract(s) sought as a result of that solicitation was/were awarded after January 1, 2012.

27. “Solicitations” means ITBs and RFPs.

28. “State (the State)” means the State of New Mexico.

29. “State Purchasing Agent” or “SPA” means the purchasing agent for the State of New Mexico or a designated representative.

E. BACKGROUND INFORMATION

New Mexico was awarded a Preschool Development Grant Birth-5 (PDG B-5) from the US Department of Health of Human Services. The administration of the PDG B-5 is a collaborative effort between the Region IX Education Cooperative, on behalf of Children Youth and Families Department, the Public Education Department and the Department of Health, with CYFD appointed by the Governor as the lead agency.

The purpose of the PDG B-5 grant is to assist states to build quality early learning systems, with a strong emphasis on conducting a statewide early learning needs assessment and resulting statewide early learning strategic plan.

5.3 Early Learning Leadership Development - A contract will be established for faculty to develop the curriculum and deliver training, including at regional Early Learning Leadership Symposia. Leadership development will include: i) early learning systems New Mexico PDG B-5 Application HHS-2018-ACF-OCC-TP-1379 Page 39 of 71 frameworks; iii) forming local early learning collaboratives / councils; iii) Coalition building; iv) policy making, budgeting and appropriations; v) facilitation; vi) advocacy, lobbying and knowing the difference; vii) systems and strategic thinking; viii) collaboration including engaging new stakeholders; ix) communication strategies, and other identified topics. The PDG B-5 team will recruit stakeholders to attend these symposia throughout the engagement process in communities, including community forums held during the needs assessment and strategic planning processes, as well as statewide parent leadership training. Additional invitations will be distributed widely, with a process for selection if the numbers grow too large. The Early Learning Advisory Council (ELAC) will be included in the symposia. Participants will leave with the charge of convening early learning collaboratives in their community. Methods based on input from the Needs Assessment are likely to include a variety of approaches e.g. symposia at the local, regional and/or state levels and directed technical assistance. Leadership development will be conducted at multiple levels and will include state early learning staff, key stakeholders and policy-makers, parents, administrators of local early learning provider agencies and will extend to community collaborative partners as appropriate. PDG B-5 funding will be used to initiate leadership development, as a long-term strategy.

F. ELIGIBLE APPLICANTS

Eligible applicants include public or private organizations with documented and demonstrated ability to provide Services as described in Section I.B.1.

II. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP contains the schedule for the procurement and describes the major procurement events as well as the conditions governing the procurement. Region IX Education Cooperative reserves the right to alter or update the schedule. Region IX Education Cooperative will make every effort to adhere to the schedule.

A. SEQUENCE OF EVENTS

The Procurement Manager will make every effort to adhere to the following schedule:

<table>
<thead>
<tr>
<th>Action</th>
<th>Responsible Party</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue RFP</td>
<td>Region IX Education Cooperative (REC9)</td>
<td>2/10/2020</td>
</tr>
</tbody>
</table>
### B. EXPLANATION OF EVENTS

The following paragraphs describe the activities listed in the sequence of events shown in Section II – A SEQUENCE OF EVENTS above.

**Issuance of RFP**

This RFP is being issued by Region IX Education Cooperative on February 10, 2020. The RFP may be viewed and downloaded at [http://www.rec9nm.org/Employment_Opportunities](http://www.rec9nm.org/Employment_Opportunities).

**Pre-Proposal Meeting**

A pre-proposal meeting will be held as indicated in the sequence of events beginning at 2:00 pm Mountain Standard Time on February 27, 2020 via GOTO MEETING:

From your computer, tablet or smartphone:

[https://global.gotomeeting.com/join/441916061](https://global.gotomeeting.com/join/441916061)

You can also dial in using your phone: +1 (224) 501-3412, Access Code: 441-916-061

Potential Offerors wishing to participate via video should download the app and be ready when your first meeting starts [https://global.gotomeeting.com/install/441916061](https://global.gotomeeting.com/install/441916061).

Potential offerors may choose to call or video conference to the meeting. Potential Offeror(s) are encouraged to submit written questions in advance of the meeting to the Procurement Coordinator (see Section I. Paragraph C). The identity of the organization submitting the question(s) will not be revealed. Additional written questions may be submitted at the meeting. All written questions will be addressed in writing as an Addendum to this RFP on the date listed in the Sequence of Events. A public log will be kept of the names of potential Offeror(s) that attended the pre-proposal meeting.

Attendance at the pre-proposal meeting is highly recommended, but not a prerequisite for submission of a proposal.
Distribution List
Potential Offerors should complete the on-line Distribution Form to have their organization placed on the procurement distribution list. The form should be submitted by an authorized representative of the organization by 4:00 pm MDT on February 19, 2020. The procurement distribution list will be used for the distribution of written responses to questions. Failure to submit the on-line Distribution Form shall constitute a presumption of receipt and rejection of the RFP, and the potential Offeror’s organization name shall not appear on the distribution list.

Deadline to Submit Written Questions
Potential Offerors may submit written questions to the Procurement Manager as to the intent or clarity of this RFP until February 19, 2020 at 4:00 p.m. Mountain Standard Time/Daylight Time as indicated in the sequence of events. All written questions must be e-mailed to kim.king@regionix.org. Questions shall be clearly labeled and shall cite the Section(s) in the RFP or other document which form the basis of the question.

Response to Written Questions
Written responses to written questions will be distributed by February 20, 2020 as indicated in the sequence of events to all potential Offerors whose organization name appears on the Distribution List. Written responses will be posted at: http://www.rec9nm.org/Employment_Opportunities

Submission of Proposal
ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVIEW AND EVALUATION BY THE PROCUREMENT MANAGER NO LATER THAN 4:00 PM MOUNTAIN STANDARD TIME /DAYLIGHT TIME ON MARCH 11, 2020. Proposals received after this deadline will not be accepted. The date and time of receipt will be electronically timestamped on each proposal.

Proposals must be submitted to the Procurement Manager via electronic submission at R9 RFP 20019 PDG B-5 Early Learning Leadership Development SUBMISSION or at the Region IX website under the Requests for Proposals section, http://www.rec9nm.org/Employment_Opportunities

A public log will be kept of the names of all Offeror organizations that submitted proposals. Pursuant to NMSA 1978, § 13-1-116, the contents of proposals shall not be disclosed to competing potential Offerors during the negotiation process. The negotiation process is deemed to be in effect until the contract is awarded pursuant to this Request for Proposals. Awarded in this context means the final required state agency signature on the contract(s) resulting from the procurement has been obtained.

Proposal Evaluation
An Evaluation Committee will perform the evaluation of proposals. This process will take place beginning on March 12, 2020, as indicated in the sequence of events, depending upon the number of proposals received. During this time, REC9 may initiate discussions with Offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals. However, proposals may be accepted and evaluated without such discussion. Discussions SHALL NOT be initiated by the Offerors.

Selection of Finalists
The Evaluation Committee will select and the Procurement Manager will notify the finalist Offerors by March 16, 2020 or as soon as possible. Only finalists will be invited to participate in the subsequent steps of the procurement. The schedule for the oral presentations/demonstrations will be determined at this time.

Best and Final Offers
Finalist Offerors may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers. Best and final offers may also be clarified and amended at finalist Offeror’s oral presentation and demonstration.
**Oral Presentation and/or Product Demonstrations by Finalists**

An oral presentation by an offeror to clarify a proposal may be required. Oral presentations will be presented virtually on March 17, 2020.

**Finalize Contractual Agreements**

Any Contractual agreement(s) resulting from this RFP will be finalized with the most advantageous Offeror by approximately March 19, 2020 or as soon thereafter as possible. This date is subject to change at the discretion of Region IX Education Cooperative. In the event mutually agreeable terms cannot be reached with the apparent most advantageous Offeror in the time specified, the State reserves the right to finalize a contractual agreement with the next most advantageous Offeror(s) without undertaking a new procurement process.

**Contract Awards**

After review of the Evaluation Committee Report and the signed contractual agreement, Region IX Education Cooperative Procurement office will award by March 20, 2020 or as soon as possible thereafter. This date is subject to change at the discretion of Region IX Education Cooperative.

The contract shall be awarded to the Offeror (or Offerors) whose proposals are most advantageous to Region IX Education Cooperative taking into consideration the evaluation factors set forth in this RFP. The most advantageous proposal may or may not have received the most points.

**Disclosure of Proposal Contents**

Proposals will be kept confidential until negotiations and the award are completed by the Agency. At that time, all proposals and documents pertaining to the proposals will be open to the public except for material that is clearly marked proprietary or confidential. The Procurement Manager will not disclose or make public any pages of a proposal on which the potential Offeror has stamped or imprinted “proprietary” or “confidential” subject to the following requirements:

a. Proprietary or confidential data shall be readily separable from the proposal to facilitate eventual public inspection of the non-confidential portion of the proposal.

b. Confidential data is restricted to:
   1. Confidential financial information concerning the Offeror’s organization;
   2. Data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act (UTSA), Sections 57-3A-1 to 57-3A-7 NMSA 1978.

Please Note: offerors shall not designate the price of products offered or the cost of services proposed as proprietary or confidential information.

If a request is received for disclosure of data for which an Offeror has made a written request for confidentiality, State Purchasing Division (SPD) or the Agency shall examine the Offeror’s request and make a written determination that specifies which portions of the proposal may be disclosed. Unless the Offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of confidential data.

**Protest Deadline**

Any protest by an Offeror must be timely and in conformance with NMSA 1978, § 13-1-172 and applicable procurement regulations. ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule and this Request for Proposals. The 15 calendar day protest period shall begin on the day following the award of contracts and will end at 5:00 pm Mountain Standard Time/Daylight Time on the 15th day. Protests must be written and must include the name and address of the protestor and the request for proposal number. It must also contain a statement of the grounds for protest including appropriate supporting exhibits and it must specify the ruling requested from the party listed below. The protest must be delivered to:

Name: Region IX Education Cooperative
Carmen Spann, Chief Procurement Officer
III. GENERAL REQUIREMENTS

This procurement will be conducted in accordance with the State purchasing Agent’s procurement code regulations, 1.4.1 NMAC

A. ACCEPTANCE OF CONDITIONS GOVERNING THE PROCUREMENT

Potential Offerors must indicate their acceptance of the Conditions Governing the Procurement section in the electronic submission form. Submission of a proposal constitutes acceptance of the Evaluation Factors contained in Section V of this RFP.

B. INCURRING COST

Any cost incurred by the potential Offeror in preparation, transmittal, and/or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror. Any cost incurred by the Offeror for set up and demonstration of the proposed equipment and/or system shall be borne solely by the Offeror.

C. PRIME CONTRACTOR RESPONSIBILITY

Any contractual agreement that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of all requirements of the contractual agreement with a state agency which may derive from this RFP. The state agency entering into a contractual agreement with a vendor will make payments to only the prime contractor.

D. SUBCONTRACTORS/CONSENT

The use of subcontractors is allowed. The prime contractor shall be wholly responsible for the entire performance of the contractual agreement whether or not subcontractors are used. Additionally, the prime contractor must receive approval, in writing, from the agency awarding any resultant contract, before any subcontractor is used during the term of this agreement.

E. AMENDED PROPOSALS

An Offeror may submit an amended proposal before the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter. Region IX Education Cooperative personnel will not merge, collate, or assemble proposal materials.

F. OFFEROR’S RIGHTS TO WITHDRAW PROPOSAL

1) Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The Offeror must submit a written withdrawal request electronically and signed by the Offeror’s duly authorized representative.

2) The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.
G.  **PROPOSAL OFFER FIRM**

Responses to this RFP, including proposal prices for services, will be considered firm for one hundred twenty (120) days after the due date for receipt of proposals or ninety (90) days after the due date for the receipt of a best and final offer, if the Offeror is invited or required to submit one.

H.  **DISCLOSURE OF PROPOSAL CONTENTS**

Proposals will be kept confidential until negotiations and the award are completed by the Agency. At that time, all proposals and documents pertaining to the proposals will be open to the public, except for material that is clearly marked proprietary or confidential. The Procurement Manager will not disclose or make public any pages of a proposal on which the potential Offeror has stamped or imprinted “proprietary” or “confidential” subject to the following requirements:

Proprietary or confidential data shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion of the proposal.

Confidential data is restricted to:
- confidential financial information concerning the Offeror’s organization;
- data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, NMSA 1978 § 57-3A-1 to 57-3A-7.

*PLEASE NOTE: The price of products offered or the cost of services proposed shall not be designated as proprietary or confidential information.*

If a request is received for disclosure of data for which an Offeror has made a written request for confidentiality, Region IX Education Cooperative shall examine the Offeror’s request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the Offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of confidential data.

I.  **NO OBLIGATION**

This RFP in no manner obligates Region IX Education Cooperative to the use of any Offeror’s services until a valid written contract is awarded and approved by appropriate authorities.

J.  **TERMINATION**

This RFP may be canceled at any time and any and all proposals may be rejected in whole or in part when the agency determines such action to be in the best interest of Region IX Education Cooperative.

K.  **SUFFICIENT APPROPRIATION**

Any contract awarded as a result of this RFP process may be terminated if sufficient appropriations or authorizations do not exist. Such terminations will be effected by sending written notice to the contractor. The Agency’s decision as to whether sufficient appropriations and authorizations are available will be accepted by the contractor as final.

L.  **LEGAL REVIEW**

Region IX Education Cooperative requires that all Offerors agree to be bound by the General Requirements contained in this RFP. Any Offeror’s concerns must be promptly submitted in writing to the attention of the Procurement Manager.
M. GOVERNING LAW
This RFP and any agreement with an Offeror which may result from this procurement shall be governed by the laws of the State of New Mexico.

N. BASIS FOR PROPOSAL
Only information supplied, in writing, by the Agency through the Procurement Manager or in this RFP should be used as the basis for the preparation of Offeror proposals.

O. CONTRACT TERMS AND CONDITIONS
1. The contract between Region IX Education Cooperative and a contractor will follow the format specified and contain the terms and conditions set forth in the Sample Contract Appendix G. However, Region IX Education Cooperative reserves the right to negotiate provisions in addition to those contained in this RFP (Sample Contract) with any Offeror. The contents of this RFP, as revised and/or supplemented, and the successful Offeror’s proposal will be incorporated into and become part of any resulting contract.

2. Region IX Education Cooperative discourages exceptions from the contract terms and conditions as set forth in the RFP Sample Contract. Such exceptions may cause a proposal to be rejected as nonresponsive when, in the sole judgment of the Agency (and its evaluation team), the proposal appears to be conditioned on the exception, or correction of what is deemed to be a deficiency, or an unacceptable exception is proposed which would require a substantial proposal rewrite to correct.

3. Should an Offeror object to any of the terms and conditions as set forth in the RFP Sample Contract (APPENDIX E) strongly enough to propose alternate terms and conditions in spite of the above, the Offeror must propose specific alternative language. The Agency may or may not accept the alternative language. General references to the Offeror’s terms and conditions or attempts at complete substitutions of the Sample Contract are not acceptable to the Agency and will result in disqualification of the Offeror’s proposal.

4. Offerors must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

5. If an Offeror fails to propose any alternate terms and conditions during the procurement process (the RFP process prior to selection as successful Offeror), no proposed alternate terms and conditions will be considered later during the negotiation process. Failure to propose alternate terms and conditions during the procurement process (the RFP process prior to selection as successful Offeror) is an explicit agreement by the Offeror that the contractual terms and conditions contained herein are accepted by the Offeror.

6. The initial contract resulting from this RFP will be for a period of one years. The contract may be extended beyond the original contract period by one-year or multi-year renewal options for a maximum of three additional years, at the Agency’s sole discretion and by mutual agreement. The contract term will not exceed a total of four (4) years.

P. OFFEROR’S TERMS AND CONDITIONS - Appendix E
Offerors must submit with the proposal a complete set of any additional terms and conditions they expect to have included in a contract negotiated with the Region IX Education Cooperative.
Q.  **CONTRACT DEVIATIONS - Appendix E**
Any additional terms and conditions, which may be the subject of negotiation (such terms and conditions having been proposed during the procurement process, that is, the RFP process prior to selection as successful Offeror), will be discussed only between Region IX Education Cooperative and the Offeror selected and shall not be deemed an opportunity to amend the Offeror’s proposal.

R.  **OFFEROR QUALIFICATIONS**
The Evaluation Committee may make such investigations as necessary to determine the ability of the potential Offeror to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any potential Offeror who is not a Responsible Offeror or fails to submit a responsive offer as defined in NMSA 1978, § 13-1-83 and 13-1-85.

S.  **RIGHT TO WAIVE MINOR IRREGULARITIES**
The Evaluation Committee reserves the right to waive minor irregularities. The Evaluation Committee also reserves the right to waive mandatory requirements provided that all of the otherwise responsive proposals failed to meet the same mandatory requirements and the failure to do so does not otherwise materially affect the procurement. This right is at the sole discretion of the Evaluation Committee.

T.  **CHANGE IN CONTRACTOR REPRESENTATIVES**
Region IX Education Cooperative reserves the right to require a change in contractor representatives if the assigned representative(s) is (are) not, in the opinion of Region IX Education Cooperative, adequately meeting the needs of Region IX Education Cooperative.

U.  **NOTICE OF PENALTIES**
The Procurement Code, NMSA 1978, § 13-1-28 through 13-1-199, imposes civil, misdemeanor and felony criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, gratuities and kickbacks.

V.  **AGENCY RIGHTS**
Region IX Education Cooperative in agreement with the Evaluation Committee reserves the right to accept all or a portion of a potential Offeror’s proposal.

W.  **RIGHT TO PUBLISH**
Throughout the duration of this procurement process and contract term, Offerors and contractors must secure from Region IX Education Cooperative written approval prior to the release of any information that pertains to the potential work or activities covered by this procurement and/or agency contracts deriving from this procurement. Failure to adhere to this requirement may result in disqualification of the Offeror’s proposal or removal from the contract.

X.  **OWNERSHIP OF PROPOSALS**
All documents submitted in response to the RFP shall become property of the Region IX Education Cooperative.
Y.  CONFIDENTIALITY

Any confidential information provided to, or developed by, the contractor in the performance of the contract resulting from this RFP shall be kept confidential and shall not be made available to any individual or organization by the contractor without the prior written approval of Region IX Education Cooperative.

The Contractor(s) agrees to protect the confidentiality of all confidential information and not to publish or disclose such information to any third party without the procuring Agency’s written permission.

Z.  ELECTRONIC MAIL ADDRESS REQUIRED

A large part of the communication regarding this procurement will be conducted by electronic mail (e-mail). Offeror must have a valid e-mail address to receive this correspondence.

AA.  USE OF ELECTRONIC VERSIONS OF THIS RFP

This RFP is being made available by electronic means. In the event of conflict between a version of the RFP in the Offeror’s possession and the version maintained by the agency, the Offeror acknowledges that the version maintained by the agency shall govern.

BB.  NEW MEXICO EMPLOYEES HEALTH COVERAGE - Appendix A

1. If the Offeror has, or grows to, six (6) or more employees who work, or who are expected to work, an average of at least 20 hours per week over a six (6) month period during the term of the contract, Offeror must agree to have in place, and agree to maintain for the term of the contract, health insurance for those employees if the expected annual value in the aggregate of any and all contracts between Contractor and the State exceed $250,000 dollars.

2. Offeror must agree to maintain a record of the number of employees who have (a) accepted health insurance; (b) decline health insurance due to other health insurance coverage already in place; or (c) decline health insurance for other reasons. These records are subject to review and audit by a representative of the state.

3. Offeror must agree to advise all employees of the availability of State publicly financed health care coverage programs by providing each employee with, as a minimum, the following web site link to additional information http://www.insurenewmexico.state.nm.us/.

4. For Indefinite Quantity, Indefinite Delivery contracts (price agreements without specific limitations on quantity and providing for an indeterminate number of orders to be placed against it), these requirements shall apply the first day of the second month after the Offeror reports combined sales (from state and, if applicable, from local public bodies if from a state price agreement) of $250,000.

CC.  CAMPAIGN CONTRIBUTION DISCLOSURE FORM- Appendix B

Offeror must complete, sign, and return the Campaign Contribution Disclosure Form, Appendix B, as a part of their proposal. This requirement applies regardless whether a covered contribution was made or not made for the positions of Governor and Lieutenant Governor or other identified official. Failure to complete and return the signed unaltered form will result in disqualification.
**DD. CONFLICT OF INTEREST - Appendix C**

Offers must complete, sign and return the Conflict of Interest Form, Appendix C as a part of their proposal. Failure to complete and return the signed unaltered form will result in disqualification.

**EE. DEBARMENT/SUSPENSION CERTIFICATION FORM - Appendix D**

Any prospective Contractor and any of its Principals who enter into a contract greater than sixty thousand dollars ($60,000.00) with any state agency or local public body for professional services, tangible personal property, services or construction agrees to disclose whether the Contractor, or any principal of the Contractor’s company:

1. is presently debarred, suspended, proposed for debarment, or declared ineligible for award of contract by any federal entity, state agency or local public body;
2. has within a three-year period preceding this offer, been convicted in a criminal matter or had a civil judgment rendered against them for: the commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) contract or subcontract; violation of Federal or state antitrust statutes related to the submission of offers; or the commission in any federal or state jurisdiction of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violation of Federal criminal tax law, or receiving stolen property;
3. is presently indicted for, or otherwise criminally or civilly charged by any (federal state or local) government entity with the commission of any of the offenses enumerated in paragraph A of this disclosure;
4. has, preceding this offer, been notified of any delinquent Federal or state taxes in an amount that exceeds $3,000.00 of which the liability remains unsatisfied. Taxes are considered delinquent if the following criteria apply.
   a. The tax liability is finally determined.
      i. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge.
      ii. In the case of a judicial challenge of the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
   b. The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.
5. Have within a three year period preceding this offer, had one or more contracts terminated for default by any federal or state agency or local public body.) Principal, for the purpose of this disclosure, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity or related entities. The Contractor shall provide immediate written notice to the State Purchasing Agent or other party to this Agreement if, at any time during the term of this Agreement, the Contractor learns that the Contractor’s disclosure was at any time erroneous or became erroneous by reason of changed circumstances. A disclosure that any of the items in this requirement exist will not necessarily result in termination of this Agreement. However, the disclosure will be considered in the determination of the Contractor’s responsibility and ability to perform under this Agreement. Failure of the Contractor to furnish a disclosure or provide additional information as requested will render the Offeror nonresponsive.
6. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the disclosure required by this document. The knowledge and information of a Contractor is not required to exceed that which is the normally possessed by a prudent person in the ordinary course of business dealings. The disclosure requirement provided is a material representation of fact upon which reliance was placed when making an award and is a continuing material representation of the facts during the term of this Agreement. If during the performance of the contract, the Contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state or local) with commission of any offenses named in this document the Contractor must provide immediate written notice to the State Purchasing Agent or other party to this Agreement. If it is later determined that the Contractor knowingly rendered an erroneous disclosure, in addition to other remedies available to the Government, the State Purchasing Agent or Central Purchasing Officer may terminate the involved contract for cause. Still further the State Purchasing Agent or Central Purchasing Officer may suspend or debar the Contractor from eligibility for
future solicitations until such time as the matter is resolved to the satisfaction of the State Purchasing Agent or Central Purchasing Officer.

IV. RESPONSE FORMAT AND ORGANIZATION

Any proposal that does not adhere to the requirements of this Section may be deemed non-responsive and rejected on that basis.

A. NUMBER OF RESPONSES

Offerors shall submit two proposals. (1) one complete proposal and if necessary, (1) one redacted proposal for public inspection. Confidential information in proposals can be redacted if:

Confidential financial information concerning the Offeror’s organization;
Data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act (UTSA), Sections 57-3A-1 to 57-3A-7 NMSA 1978.

B. METHOD OF SUBMISSION

All proposals must be submitted electronically via R9 RFP 20019 PDG B-5 Early Learning Leadership Development SUBMISSION. The Offeror need only submit a single electronic copy of the proposal, outlined below.

C. SUBMISSION FORMAT

All information for the technical proposal must be combined into a single pdf file/document for uploading. File naming convention <COMPANY NAME_RFP20019> and <COMPANY NAME_RFP20019_REDACTED> (if applicable).

D. TECHNICAL ISSUES

For technical support issues contact:
Kim King
(575) 257-2368 Ext 111
kim.king@regionix.org

E. PROPOSAL FORMAT

All proposals must be submitted as follows:
- Typeface must be easily readable such as Arial, Courier, or Times Roman and type size must be 12-point.
- The Proposal may not exceed the number of pages provided in section F. RESPONSE ORGANIZATION
- All pages shall be numbered.

F. RESPONSE ORGANIZATION

The proposal must be organized in the following format and must contain, at a minimum, all listed items in the sequence indicated. Offerors should respond in the form of a thorough narrative to each specification in correlation unless otherwise instructed. The narratives, including required supporting materials will be evaluated and awarded points accordingly.

1. Technical Proposal
a. **Organization Background and Qualifications - no more than 10 pages** - In narrative form describe your organization’s background and qualifications to include:
   
i. Overview and background of the organization.
   ii. Organization vision and mission and how it aligns with this work
   iii. Organization’s experience with similar or relevant contracts.
   iv. Qualifications of key personnel to work on the project
   v. Organization’s ability to begin on contract start date and capacity to complete project within specific dates.
   vi. Organizational chart for the project and how the project fits into the organization’s overall structure.

b. **Implementation Plan - no more than 20 pages** - The offeror should describe how they will develop and deliver face to face training and best practices to early learning stakeholders throughout the state. Offerors are encouraged to demonstrate innovation and flexibility in the development and delivery of the training. Trainings should occur at times convenient for participants including weekends, evenings, and early mornings. The offeror should describe how the training will be tailored to three specific cohorts: Local, Higher Education and Statewide for a total of 11 teams.

Approximately seven (7) teams in the Local Cohort, which will include early learning staff, community leaders, local policy makers, administrators of early learning provider agencies, families and other local agencies interested in building capacity in their communities.

One (1) Higher Education Cohort which will include faculty, students and early childhood academia.

Approximately three (3) teams in the Statewide Cohort, which will include state early learning staff, key stakeholders, policy-makers, Early Learning Advisory Council (ELAC) state PDG leadership team and other state-level early childhood stakeholders.

Training topics are likely to include:
- early learning systems frameworks;
- forming local early learning collaboratives/councils;
- coalition building;
- policy making, budgeting and appropriations;
- facilitation;
- advocacy and lobbying;
- systems and strategic thinking;
- collaboration skills including engaging new stakeholders;
- communication strategies, and other identified topics;
- improving early childhood program quality and access;
- coordination and alignment across programs at every level (alignment with health systems, schools and economic development); and
- retention, development, support and recruitment of early childhood professionals.

Offerer should describe how they will deliver of face to face training to include:
- Participant registration
- Meeting rooms costs
- Food and refreshments (as needed)
- Printing of materials
- Sign Language Interpretation (as needed)
- Translators (as needed)
- Costs for participants to attend:
The implementation plan should include a timeline to provide face to face training to eleven (11) teams with at least two convenings for each team.

The training program will be evaluated by APEX Education, Inc and subcontractor, Insight Allies, who have been contracted to evaluate all components of the PDG B-5 grant. A member of the evaluation team should be present at each training to ensure ongoing evaluation can occur.

Deliverables:
1. Detailed work plan to provide training to the eleven teams
   - Timeline - within one week of contract signing
2. Bi-monthly communication with PDG Project Director on items completed, barriers/concerns, and items to be completed.
3. Bi-monthly report which includes:
   - Cohort
   - Location of training
   - Number of participants
   - Role in Early Childhood (parent, teacher, administrator, etc)
   - Number of participants indicating committed to continued participation in the Cohort after the training(s)
   - Number of participants entering into a leadership role within the Cohort after the training(s)
   - Measures of satisfaction with training events
4. Final report to be delivered by July 15, 2020 will include all deliverables, outcomes and suggestions for future leadership development
5. At the completion of the training, copies of all training materials (hard copy and electronic as applicable) shall be provided to the State of New Mexico, which will retain ownership and rights to all materials developed under this contract.

C. References
Offerors must submit three (3) references and include organization name, contact person, phone, email address, starting and ending dates and services performed. References must be from projects completed within the last 24 months. Individuals identified in letters of reference may be contacted by Region IX for additional information. If individuals are not available for further contact, alternative references must be listed.

d. Cost Proposal
Offerors must complete APPENDIX F - Cost Proposal Form. Offers should describe and justify the project budget and clearly tie the scope of work to the determination of the amounts shown in the project budget. Cost proposal should include all fees, including gross receipt tax. Salaries and benefits incorporated in the cost proposal should include the percentage of a full time employee (FTE) allocated to the project. Reasonableness and allowability will be evaluated and lowest cost will not be a factor. Administrative costs cannot exceed 10%. Total budget for this project - $120,000.00

2. SUPPLEMENTAL INFORMATION - no more than 20 pages
This procurement will result in a contractual agreement between two parties; the procurement may not be used by other parties.

**G. EVALUATION**

**A. Evaluation Point Summary and Factors**

1. All Offeror proposals will be reviewed for compliance with the requirements and specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.

2. The Procurement Manager may contact the Offeror for clarification of the response.

3. The Evaluation Committee may use other sources to perform the evaluation.

4. Responsive proposals will be evaluated on the factors in Section IV, which have been assigned a point value. The responsible Offerors with the highest scores will be selected as finalist Offerors, based upon the proposals submitted. The responsible Offerors whose proposals are most advantageous to the State taking into consideration the evaluation factors. Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

**Mandatory Requirements.** The first table lists this RFP’s mandatory requirements. If the offeror’s Proposal meets all the mandatory requirements, the offeror’s Proposal may be included in the next part of the evaluation phase described in the next table.

<table>
<thead>
<tr>
<th>Offeror Mandatory Requirements</th>
<th>Pass (Accept)</th>
<th>Fail (Reject)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The proposal is formatted as described in Section V. E. Proposal Format</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The proposal is organized as described in Section V.F. Response Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Mexico Employees Health Coverage Form - Appendix A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signed Campaign Contribution Form - Appendix B</td>
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<tr>
<td>Conflict of Interest Form - Appendix C</td>
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<tr>
<td>Debarment/Suspension Certification Form - Appendix D</td>
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<tr>
<td>Response to Contract Terms and Conditions - Appendix E</td>
<td></td>
<td></td>
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<tr>
<td>Cost Proposal Form - Appendix F</td>
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</table>

**Scored Criteria.** In the technical evaluation phase, the Evaluation Committee will rate the technical merits of the Proposals based on the following requirements:
### Section IV.F.1.a Organization Background and Qualifications - 72 points

<table>
<thead>
<tr>
<th>Evaluation Factor</th>
<th>No Response Given</th>
<th>Inadequate Response</th>
<th>Adequate Response, no special insights</th>
<th>More than adequate response</th>
<th>Excellent, insightful response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview and background of the organization</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Organization vision and mission and how it aligns with this work.</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Organization’s experience with similar or relevant contracts. If submitting a proposal for each Activity, please provide this information for each Activity.</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Qualifications of key personnel to work on the project.</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Organization’s ability to begin on contract start date and capacity to complete project within specific dates.</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Organizational chart for the project and how the project fits into the organization’s overall structure.</td>
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<td>3</td>
<td>5</td>
<td>8</td>
<td>12</td>
</tr>
</tbody>
</table>

### Section IV.F.1.b Implementation Plan - 220 points (for each Activity)

<table>
<thead>
<tr>
<th>Evaluation Factor</th>
<th>No Response Given</th>
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<th>Adequate Response, no special insights</th>
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</thead>
<tbody>
<tr>
<td>The offeror should describe how they will develop and deliver training and best practices to early learning stakeholders throughout the state.</td>
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<td>20-25</td>
<td>26-50</td>
<td>51-80</td>
<td>81-100</td>
</tr>
<tr>
<td>Offeror should describe how they will deliver of face to face training to include:</td>
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<td>20-25</td>
<td>26-50</td>
<td>51-80</td>
<td>81-100</td>
</tr>
<tr>
<td>● Participant registration</td>
<td></td>
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<tr>
<td>● Meeting rooms costs</td>
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<td>● Printing of materials</td>
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<tr>
<td>● Sign Language Interpretation (as needed)</td>
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<td></td>
</tr>
<tr>
<td>● Costs for participants to attend:</td>
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<tr>
<td>○ Mileage</td>
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<tr>
<td>○ Lodging (if needed)</td>
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<tr>
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<td>20-25</td>
<td>26-50</td>
<td>51-80</td>
<td>81-100</td>
</tr>
</tbody>
</table>

### Section IV.F.1.c References - 12 points

| Offerors must submit three (3) references and include organization name, contact person, phone, email address, | 0 | 3 | 5 | 8 | 12 |
starting and ending dates and services performed. References must be from projects completed within the last 24 months. Individuals identified in letters of reference may be contacted by Region IX for additional information. If individuals are not available for further contact, alternative references must be listed.

<table>
<thead>
<tr>
<th>Section IV.F.1.c Cost Proposal -20 points (for each Activity)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offerors should describe and justify the project budget and clearly tie the scope of work to the determination of the amounts shown in the project budget. Cost proposal should include all fees, including gross receipt tax. Salaries and benefits incorporated in the cost proposal should include the percentage of a full time employee (FTE) allocated to the project. Reasonableness and allowability will be evaluated and lowest cost will not be a factor.</td>
</tr>
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<td>0</td>
</tr>
</tbody>
</table>

V. ADMINISTRATIVE REQUIREMENTS

Prior to contract execution, offeror must provide the following documents within 15 days of contract award:

- The Provider of services either as an individual for a firm, shall keep in force a policy for professional liability insurance for the duration of the contract period. Proof of insurance must be provided within thirty (30) calendar days of contract award and shall name Region IX as additionally insured.
- Tax Identification: The Offeror must possess a tax identification number
- Contractor must be a registered business in the State of New Mexico with a CRS number
APPENDIX A - NEW MEXICO EMPLOYEES HEALTH COVERAGE FORM
RFP 20019 PDG B-5 Early Learning Leadership Development

1. If Offeror has, or grows to, six (6) or more employees who work, or who are expected to work, an average of at least 20 hours per week over a six (6) month period during the term of the contract, Offeror certifies, by signing this agreement, to have in place and agree to maintain the term of the contract, health insurance for those employees and offer that health insurance to those employees no later than May 10, 2010, if the expected annual value in the aggregate of any and all contracts between Offeror and Region IX exceed $250,000.00.

2. Offeror agrees to maintain a record of the number of employees who have (a) accepted health insurance; (b) declined health insurance due to other health insurance coverage already in place; or (c) declined health insurance for other reasons.

3. Offeror agrees to advise all employees of the availability of State publically financed health care coverage programs by providing each employee with, as a minimum, the following web site link to additional information: https://www.bewellnm.com/.

Signature of Offeror: ________________________________

Date: __________________
APPENDIX B - CAMPAIGN CONTRIBUTION DISCLOSURE FORM
RFP 20019 PDG B-5 Early Learning Leadership Development

Pursuant to NMSA 1978, § 13-1-191.1 (2006), any person seeking to enter into a contract with any state agency or local public body for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The prospective contractor must disclose whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds two hundred and fifty dollars ($250) over the two year period.

Furthermore, the state agency or local public body shall void an executed contract or cancel a solicitation or proposed award for a proposed contract if: 1) a prospective contractor, a family member of the prospective contractor, or a representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official’s employees during the pendency of the procurement process or 2) a prospective contractor fails to submit a fully completed disclosure statement pursuant to the law.

THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

“Applicable public official” means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

“Campaign Contribution” means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official’s behalf for the purpose of electing the official to either statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

“Family member” means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law.

“Pendency of the procurement process” means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

“Person” means any corporation, partnership, individual, joint venture, association or any other private legal entity.

“Prospective contractor” means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

“Representative of a prospective contractor” means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

DISCLOSURE OF CONTRIBUTIONS:
Contribution Made By: ____________________________________________
Relation to Prospective Contractor: ____________________________________________
Name of Applicable Public Official: ____________________________________________
Date Contribution(s) Made: ____________________________________________
__________________________________________
Amount(s) of Contribution(s) ____________________________________________
__________________________________________
Nature of Contribution(s) ____________________________________________
__________________________________________
Purpose of Contribution(s) ____________________________________________
(Attach extra pages if necessary)

Signature _______________________________ Date _______________________________
Title (position) ____________________________________________

—OR—

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS ($250) WERE MADE to an applicable public official by me, a family member or representative.

Signature _______________________________ Date _______________________________
Title (Position) _______________________________
APPENDIX C - CONFLICT OF INTEREST FORM

RFP 20019 PDG B-5 Early Learning Leadership Development

As utilized herein, the term “Vendor” shall mean that entity submitting a proposal to Region IX Education Cooperative in response to the above referenced request for proposals.

The authorized Person, Firm and/or Corporation states that to the best of his/her belief and knowledge:

No employee or Coordinating Council member of Region IX Education Cooperative, New Mexico Children, Youth and Families Department, New Mexico Public Education Department or New Mexico Department of Health (or close relative), with the exception of the person(s) identified below, has a direct or indirect financial interest in the Vendor or in the proposed transaction. Vendor neither employs, nor is negotiating to employ, any Region IX Education Cooperative employee, council member or close relative, with the exception of the person(s) identified below.

Vendor did not participate, directly or indirectly, in the preparation of specifications upon which the quote or offer is made. If the Vendor is a New Mexico State Legislator or if a New Mexico State Legislator holds a controlling interest in Vendor, please identify the Legislator:

__________________________________________________________________

List below the names(s) of any New Mexico Children, Youth and Families Department, New Mexico Public Education Department or New Mexico Department of Health, Region IX Education Cooperative employee, board member or close relative who now or within the preceding 12 months (1) works for the Vendor; (2) has an ownership interest in the Vendor (other than as an owner of less than 1% of Vendor’s stock, if Vendor is a publicly traded corporation); (3) is a partner, officer, director, trustee or consultant to the Vendor; (4) has received grant, travel, honoraria or other similar support from Vendor; or (5) has a right to receive royalties from the vendor.

__________________________________________________________________

__________________________________________________________________

__________________________________________________________________

CERTIFICATION

The undersigned hereby certifies that he/she has read the above CONFLICT OF INTEREST Status requirements and that he/she understands and will comply with these requirements. The undersigned further certifies that they have the authority to certify compliance for the vendor named and that the information contained in this document is true and accurate to the best of their knowledge.

Signature of Offeror: ________________________________

Date: ___________________
APPENDIX D - SUSPENSION STATUS FORM
RFP 20019 PDG B-5 Early Learning Leadership Development

The Vendor certifies that it is not suspended, debarred or ineligible from entering into contracts with the Federal Government, or any State agency or local public body, or in receipt of a notice or proposed debarment from any Federal or State agency or local public body. The Vendor agrees to provide immediate notice to Region IX Education Cooperative Procurement Department in the event of being suspended, debarred or declared ineligible by any department or agency of the Federal government, or any agency of local public body of the State of New Mexico, or upon receipt of a notice or proposed debarment that is received after the submission of the quote or offer but prior to the award of the purchase order or contract.

CERTIFICATION

The undersigned hereby certifies that he/she has read the above CONFLICT OF INTEREST Status requirements and that he/she understands and will comply with these requirements. The undersigned further certifies that they have the authority to certify compliance for the vendor named and that the information contained in this document is true and accurate to the best of their knowledge.

Signature of Offeror: ________________________________

Date: ________________________
APPENDIX E - RESPONSE TO CONTRACT TERMS AND CONDITIONS
FORM

RFP 20019 PDG B-5 Early Learning Leadership Development

The contract between Region IX Education Cooperative and a contractor will follow the format specified and contain the terms and conditions set forth in the Sample Contract Appendix G. However, Region IX Education Cooperative reserves the right to negotiate provisions in addition to those contained in this RFP (Sample Contract) with any Offeror. The contents of this RFP, as revised and/or supplemented, and the successful Offeror’s proposal will be incorporated into and become part of any resultant contract.

Region IX Education Cooperative discourages exceptions from the contract terms and conditions as set forth in the RFP Sample Contract. Such exceptions may cause a proposal to be rejected as non responsive when, in the sole judgment of the Agency (and its evaluation team), the proposal appears to be conditioned on the exception, or correction of what is deemed to be a deficiency, or an unacceptable exception is proposed which would require a substantial proposal rewrite to correct.

Should an Offeror object to any of the terms and conditions as set forth in the RFP Sample Contract (APPENDIX GE) strongly enough to propose alternate terms and conditions in spite of the above, the Offeror must propose specific alternative language. The Agency may or may not accept the alternative language. General references to the Offeror’s terms and conditions or attempts at complete substitutions of the Sample Contract are not acceptable to the Agency and will result in disqualification of the Offeror’s proposal.

Offerors must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

If an Offeror fails to propose any alternate terms and conditions during the procurement process (the RFP process prior to selection as successful Offeror), no proposed alternate terms and conditions will be considered later during the negotiation process. Failure to propose alternate terms and conditions during the procurement process (the RFP process prior to selection as successful Offeror) is an explicit agreement by the Offeror that the contractual terms and conditions contained herein are accepted by the Offeror.

_______________________________________________________________________________________________________________________________________
The Offeror takes NO exceptions, subsequently accepting the Terms and Conditions as set forth in Appendix G.

________________________________________  ______________________
Signature                                      Date

________________________________________
Title (position)

—OR—

Offeror takes expectations to the following Terms and Conditions in Appendix E.

________________________________________  ______________________
Signature                                      Date

________________________________________
Title (Position)
APPENDIX F COST PROPOSAL FORM

RFP 20019 PDG B-5 Early Learning Leadership Development

Complete a cost proposal for each Activity described in Section IV.F.1. Administrative costs cannot exceed 10% of the total award. Salaries and benefits incorporated in the cost proposal should include the percentage of a full time employee (FTE) allocated to the project. Total budget = $120,000

VENDOR NAME:

ACTIVITY:

<table>
<thead>
<tr>
<th>Description</th>
<th>Fixed Price or Fee for Service</th>
<th>Rate</th>
<th>Hourly, Daily or per training</th>
<th>Qty</th>
<th>Total Amount April - June 30, 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services to develop training materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional Services to provide face to face training</td>
<td></td>
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<td></td>
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<tr>
<td>Event coordination</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Event costs (registration, venue, food, materials, interpreters, mileage reimbursement, lodging)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other costs (please describe)</td>
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<tr>
<td>Other costs (please describe)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Costs</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Gross Receipt Tax</td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Grand Total Cost</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Cost Proposal Narrative: Offerors should describe and justify the project budget and clearly tie the scope of work to the determination of the amounts shown in the project budget. Cost proposal should include all fees, including gross receipt tax. Salaries and benefits incorporated in the cost proposal should include the percentage of a full time employee (FTE) allocated to the project. Reasonableness and allowability will be evaluated and lowest cost will not be a factor. Administrative costs cannot exceed 10%. Total budget for this project - $120,000.00

1. Professional Services to develop training materials:
2. Professional Services to provide face to face training:
3. Event coordination
4. Event costs (registration, venue, food, materials, interpreters, mileage reimbursement, lodging)
5. Other costs (please describe)
APPENDIX G - SAMPLE CONTRACT

PROFESSIONAL SERVICES CONTRACT

Contract #

THIS AGREEMENT is made and entered into by and between the State of New Mexico, REGION IX EDUCATION COOPERATIVE (REC IX), hereinafter referred to as the “Agency,” and "<<CONTRACTOR>> (XXX), hereinafter referred to as the “Contractor,” and is effective as of the date set forth below upon which it is executed by the REC IX Executive Director.

IT IS AGREED BETWEEN THE PARTIES:

1. **Scope of Work.**
   The Contractor shall provide professional services pursuant to the detailed scope of work and budget attached as Addendum A.

2. **Compensation.**
   A. The Agency shall pay to the Contractor monthly payments for services satisfactorily performed and expenses incurred pursuant to “ADDENDUM A,” such compensation not to exceed XXXXXXXXXXXX dollars, including gross receipts tax. Expenses shall include, but not be limited to, report writing, professional development, phone consultations, follow-up recommendations, travel, lodging, meals, mileage, and all taxes and fees. The total amount payable to the Contractor under this Agreement, including gross receipts tax and expenses, shall not exceed XXXXXXXXXXX. This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Agreement shall equal the amount stated herein. The parties do not intend for the Contractor to continue to provide services without compensation when the total compensation amount is reached. Contractor is responsible for notifying the Agency when the services provided under this Agreement reach the total compensation amount. In no event will the Contractor be paid for services provided in excess of the total compensation amount without this Agreement being amended in writing prior to those services in excess of the total compensation amount being provided.

   B. Payment is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the "<<Children, Youth and Families Department >> pursuant to Intergovernmental Agreement #<<XX-XX-XXXXXX>>. All invoices MUST BE received by the Agency no later July 1, 2020. Invoices received after such date WILL NOT BE PAID.

   C. Contractor shall submit detailed invoices accounting for all services performed and expenses incurred. If the Agency finds that the services or expenses are not acceptable, within thirty days after the date of receipt of written notice from the Contractor that payment is requested, it shall provide the Contractor a letter of exception explaining the defect or objection to the services or expenses, and outlining steps the Contractor may take to provide remedial action. Upon certification by the Agency that the services or expenses have been received and accepted, payment shall be tendered to the Contractor...
within thirty days after the date of acceptance. If payment is made by mail, the payment shall be deemed tendered on the date it is postmarked. However, the agency shall not incur late charges, interest, or penalties for failure to make payment within the time specified herein.

3. **Term.**
   THIS AGREEMENT SHALL NOT BECOME EFFECTIVE UNTIL SIGNED BY THE REC IX EXECUTIVE DIRECTOR. This Agreement shall terminate on **June 30, 2020** unless terminated pursuant to paragraph 4 (Termination), or paragraph 5 (Appropriations).

4. **Termination.**
   A. **Grounds.** The Agency may terminate this Agreement for convenience or cause. The Contractor may only terminate this Agreement based upon the Agency’s uncured, material breach of this Agreement.

   B. **Notice; Agency Opportunity to Cure.**
      1. Except as otherwise provided in Paragraph (4)(B)(3), the Agency shall give Contractor written notice of termination at least thirty (30) days prior to the intended date of termination.
      2. Contractor shall give Agency written notice of termination at least thirty (30) days prior to the intended date of termination, which notice shall (i) identify all the Agency’s material breaches of this Agreement upon which the termination is based and (ii) state what the Agency must do to cure such material breaches. Contractor’s notice of termination shall only be effective (i) if the Agency does not cure all material breaches within the thirty (30) day notice period or (ii) in the case of material breaches that cannot be cured within thirty (30) days, the Agency does not, within the thirty (30) day notice period, notify the Contractor of its intent to cure and begin with due diligence to cure the material breach.

      3. Notwithstanding the foregoing, this Agreement may be terminated immediately upon written notice to the Contractor (i) if the Contractor becomes unable to perform the services contracted for, as determined by the Agency; (ii) if, during the term of this Agreement, the Contractor is suspended or debarred by the State Purchasing Agent; or (iii) the Agreement is terminated pursuant to Paragraph 5, “Appropriations”, of this Agreement.

   C. **Liability.** Except as otherwise expressly allowed or provided under this Agreement, the Agency’s sole liability upon termination shall be to pay for acceptable work performed prior to the Contractor’s receipt or issuance of a notice of termination; provided, however, that a notice of termination shall not nullify or otherwise affect either party’s liability for pre-termination defaults under or breaches of this Agreement. The Contractor shall submit an invoice for such work within thirty (30) days of receiving or sending the notice of termination. **THIS PROVISION IS NOT EXCLUSIVE AND DOES NOT WAIVE THE AGENCY’S OTHER LEGAL RIGHTS AND REMEDIES CAUSED BY THE CONTRACTOR’S DEFAULT/BREACH OF THIS AGREEMENT.**

   D. **Termination Management.** Immediately upon receipt by either the Agency or the Contractor of notice of termination of this Agreement, the Contractor shall: 1) not incur any further obligations for salaries, services or any other expenditure of funds under this Agreement without written approval of the Agency; 2) comply with all directives issued by the Agency in the notice of termination as to the performance of work under this Agreement; and 3) take such action as the Agency shall direct for the protection, preservation, retention or transfer of all property titled to the Agency and records generated
under this Agreement. Any non-expendable personal property or equipment provided to or purchased by the Contractor with contract funds shall become property of the Agency upon termination and shall be submitted to the agency as soon as practicable.

5. **Appropriations.**
   The terms of this Agreement are contingent upon sufficient appropriations and authorization being made by the Legislature of New Mexico for the performance of this Agreement. If sufficient appropriations and authorization are not made by the Legislature, this Agreement shall terminate immediately upon written notice being given by the Agency to the Contractor. The Agency's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the Agency proposes an amendment to the Agreement to unilaterally reduce funding, the Contractor shall have the option to terminate the Agreement or to agree to the reduced funding, within thirty (30) days of receipt of the proposed amendment.

6. **Status of Contractor.**
   The Contractor and its agents and employees are independent contractors performing professional services for the Agency and are not employees of the REC IX. The Contractor and its agents and employees shall not accrue leave, retirement, insurance or any other benefits afforded to employees of the Agency as a result of this Agreement. The Contractor acknowledges that all sums received hereunder are reportable by the Contractor for tax purposes, including without limitation, self-employment and business income tax. The Contractor agrees not to purport to bind the REC IX unless the Contractor has express written authority to do so, and then only within the strict limits of that authority.

7. **Assignment.**
   The Contractor shall not assign or transfer any interest in this Agreement or assign any claims for money due or to become due under this Agreement without the prior written approval of the Agency.

8. **Subcontracting.**
   The Contractor shall not subcontract any portion of the services to be performed under this Agreement **without the prior written approval of the Agency.** No such subcontract shall relieve the primary Contractor from its obligations and liabilities under this Agreement, nor shall any subcontract obligate direct payment from the Agency. A copy of an approved subcontract shall be sent to the Agency within 15 days of final execution.

9. **Release.**
   Final payment of the amounts due under this Agreement shall operate as a release of the Agency, its officers and employees, and the State of New Mexico from all liabilities, claims and obligations whatsoever arising from or under this Agreement.
10. **Confidentiality.**
Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the Agency. Contractor further agrees to comply with all provisions of the Family Educational and Privacy Act (FERPA), 20 U.S.C. Sec. 1232 (g) and to hold Agency harmless from claims, complaints or causes of action arising from an alleged violation of FERPA.

11. **Product of Service -- Copyright.**
All materials developed or acquired by the Contractor under this Agreement shall become the property of the State of New Mexico and shall be delivered to the Agency no later than the termination date of this Agreement. Nothing developed or produced, in whole or in part, by the Contractor under this Agreement shall be the subject of an application for copyright or other claim of ownership by or on behalf of the Contractor. Contractor shall further not cite to materials, data, analyses or reports developed or acquired under this Agreement without written permission of the REC IX Executive Director or the Executive Director’s Designee.

12. **Amendment.**
A. This Agreement shall not be altered, changed or amended except by instrument in writing executed by the parties hereto and all other required signatories.

B. If the Agency proposes an amendment to the Agreement to unilaterally reduce funding due to budget or other considerations, the Contractor shall, within thirty (30) days of receipt of the proposed Amendment, have the option to terminate the Agreement, pursuant to the termination provisions as set forth in Article 4 herein, or to agree to the reduced funding.

13. **Merger.**
This Agreement incorporates all the Agreements, covenants and understandings between the parties hereto concerning the subject matter hereof, and all such covenants, Agreements and understandings have been merged into this written Agreement. No prior Agreement or understanding, oral or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

14. **Penalties for violation of law.**
The Procurement Code, NMSA 1978 §§ 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for illegal bribes, gratuities and kickbacks.

15. **Applicable Law.**
The laws of the State of New Mexico shall govern this Agreement, without giving effect to its choice of law provisions. Venue shall be proper only in a New Mexico court of competent jurisdiction in accordance with NMSA 1978, § 38-3-1 (G). By execution of this Agreement, Contractor acknowledges and agrees to the jurisdiction of the courts of the State of New Mexico over any and all lawsuits arising under or out of any term of this Agreement.

16. **Records and Financial Audit.**
A. The Contractor shall maintain detailed time and expenditure records that indicate the date; time, nature and cost of services rendered during the Agreement’s term and effect and retain them for a period of three (3) years from the date of final payment under this Agreement. The records shall be subject to inspection by the Agency and the State Auditor. The Agency shall have the right to audit billings both before and after payment. Payment under this Agreement shall not foreclose the right of the Agency to recover excessive or illegal payments.

B. Contractor shall provide background checks for any employees or sub-contractors that may have contact with children.

17. **Indemnification.**
   The Contractor shall defend, indemnify and hold harmless the Agency and the State of New Mexico from all actions, proceeding, claims, demands, costs, damages, attorneys’ fees and all other liabilities and expenses of any kind from any source which may arise out of the performance of this Agreement, caused by the negligent act or failure to act of the Contractor, its officers, employees, servants, subcontractors or agents, or if caused by the actions of any client of the Contractor resulting in injury or damage to persons or property during the time when the Contractor or any officer, agent, employee, servant or subcontractor thereof has or is performing services pursuant to this Agreement. In the event that any action, suit or proceeding related to the services performed by the Contractor or any officer, agent, employee, servant or subcontractor under this Agreement is brought against the Contractor, the Contractor shall, as soon as practicable but no later than two (2) days after it receives notice thereof, notify the Agency by certified mail.

18. **Invalid Term or Condition.**
   If any term or condition of this Agreement shall be held invalid or unenforceable, the remainder of this Agreement shall not be affected and shall be valid and enforceable.

19. **Enforcement of Agreement.**
   A party's failure to require strict performance of any provision of this Agreement shall not waive or diminish that party's right thereafter to demand strict compliance with that or any other provision. No waiver by a party of any of its rights under this Agreement shall be effective unless express and in writing, and no effective waiver by a party of any of its rights shall be effective to waive any other rights.

20. **Notices.**
   Any notice required to be given to either party by this Agreement shall be in writing and shall be delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

   To the Agency:
   Kim King
   143 El Paso Rd.
   Ruidoso, NM  88345
   Kim.King@regionix.org.

   To the Contractor:
   [insert name, address and email].
21. **Authority.**
If Contractor is other than a natural person, the individual(s) signing this Agreement on behalf of Contractor represents and warrants that he or she has the power and authority to bind Contractor, and that no further action, resolution, or approval from Contractor is necessary to enter into a binding contract.

22. **Insurance.**
Contractor shall maintain in force during the entire term of this Agreement comprehensive general liability insurance and shall produce a copy of policy if requested by RECIX.

**IN WITNESS WHEREOF,** the parties have executed this Agreement as of the date of signature by the AGENCY EXECUTIVE DIRECTOR below.

By:  

Bryan Dooley, REC IX Executive Director

Date:

By:  

Name

Date:

Print Title
Addendum A

This Addendum is attached to and forms part of the Contract between REC IX and <Contractor Name>. It is an integral part of the Contract and except as set forth herein, subject to its terms and conditions.

Scope of Work:
<<INSERT SCOPE OF WORK>>

Start Date: Upon fully executed contract
End Date: June 30, 2020

Budget
This is a << FEE FOR SERVICE >> << FIXED PRICE >> contract.

<Insert Budget/Fee Schedule Here>

Submit Invoices to:
Region IX Education Cooperative
r9contracts@regionix.org

Administrative
<<INSERT ADMIN HERE>>