SERVICE AGREEMENT
Demographer Study Services
RFP #2019-49

This agreement made and entered into this 29th day of July 2019, by and between the Lee’s Summit R-7 School District, herein after referred to as the “District”. The District is awarding the Demographer Study Services contract to Applied Economics hereafter referred to as “Service Provider”, Witnessed, that:

Whereas, Service Provider has offered to provide the services, payment terms and insurance requirements, subject to the General Conditions described in Exhibit A and

Whereas, the District desires to engage Service Provider to perform such services.

Now, therefore, in consideration of the mutual covenants and considerations herein contained, it is hereby agreed by the parties hereto as follows:

1. District employs Service Provider to perform the services hereinafter set forth.

2. Services: Service Provider represents that it is equipped, competent and able to perform, and that it will perform all services hereinafter set forth in a diligent, competent and workmanlike manner. Service Provider will perform all such services in accordance with the following provisions, incorporated into this Agreement as if set forth in full herein: the Service Provider’s Proposal, (“Proposal”); Scope of Services (“Scope”); Pricing; Payment Terms; Insurance Requirements and General Terms and Conditions, attached hereto as Exhibit A.

3. The term of this Agreement shall commence on September 9, 2019 and expire on September 8, 2020. At the District’s option, the contract may be extended for three (3) additional one (1) year periods. Prices shall remain firm for the initial term of this contract.

4. This Contract may be terminated by either party upon thirty (30) days prior notice in writing to the other party. The District may terminate this contract immediately, under breach of contract, if the Service Provider fails to perform in accordance with the terms and conditions as referenced to and incorporated above.

5. This Agreement shall be binding on the parties thereto only after it has been duly executed and approved by the District and the Service Provider.

Lee’s Summit R-7 School District:

Title: Interim Superintendent

Date: 9/24/19

Applied Economics:

Principal

Date: 9/20/2019
LEE’S SUMMIT R-7 SCHOOL DISTRICT
PROPOSAL FOR DEMOGRAPHIC STUDY SERVICES

SUBMITTED BY:
APPLIED ECONOMICS
11209 N. TATUM BLVD., SUITE 225
PHOENIX, AZ 85028
(602) 765-2400

IN ASSOCIATION WITH:
LANDMARKETING
14904 SOUTH ROSEHILL ROAD
OLATHE, KS 66062
(913) 469-0025

AND:
GuideK12™
12301 WHITewater DRIVE, SUITE 10
MINNETONKA, MN 55343
(763) 497-8092

SUBMISSION DATE:
JULY 5, 2019
# Table of Contents

COVER LETTER  .................................................................................................................... iii

FORMS 1-6 .............................................................................................................................. 1
  
  FORM 1: CONSULTANT PROFILE.................................................................................. 1
  FORM 2: KEY OUTSIDE CONSULTANTS ................................................................... 2
  FORM 3: EXPERIENCE / REFERENCES ....................................................................... 3
  FORM 4: RESUMES OF KEY PERSONNEL ................................................................. 11
  FORM 5: PROJECT NARRATIVE .................................................................................. 17
  FORM 6: PRICING ........................................................................................................ 21

W-9 AND E-VERIFICATION ................................................................................................. 22

CERTIFICATE OF INSURANCE .......................................................................................... 24

COPY OF SOLICITATION .................................................................................................... 25

GUIDEK12 MARKETING MATERIALS ............................................................................... 50
July 5, 2019

Ms. Christa Battaglia  
Lee’s Summit R-7 School District  
702 SE 291 Highway  
Lee’s Summit, Missouri 64063

Dear Ms. Battaglia:

Applied Economics, and sub-consultants Landmarketing Inc. and GuidK12, are pleased to present this proposal to the Lee’s Summit R-7 School District for Demographic Services. Applied Economics has prepared over a hundred such studies since our founding in 1995, servings dozens of school districts including Lee’s Summit R-7, Liberty and St. Joseph in Missouri. Our partners for this effort include Landmarketing, of Olathe, Kansas, which brings recognized local expertise in the housing industry and real estate market, and GuideK12 providing advanced GIS technology for student and school information and staff analyses.

The proposed study would include an analysis of past shifts in the demographics and enrollment in the District, as well as look ahead at likely future trends in both the number and distribution of students. Our proposed method of approach for the projections for Lee’s Summit R-7 School District is remains unchanged, having provided precision of less than 1 percent variation per year between actual and projected enrollment in 16 of the past 17 years. Landmarketing and GuideK12 supply data and systems to numerous school districts, but the approach is always tailored to the characteristics and needs of the individual school district.

Major work items under this proposal include:

- Collecting and tabulating historical demographic and housing information;
- Obtaining and analyzing past enrollment by grade by school;
- Obtaining and “geo-coding” current student information;
- Surveying future residential development potential;
- Projecting annual District-level enrollment by grade for 10 years;
- Projecting small-area (attendance area) enrollment by grade for 10 years;
- Documenting the results of the Demographic Study in a written report; and
- Assisting with the development of attendance area scenarios as needed.
- Optionally providing the GuideK12 Suite of data dissemination and analysis tools.

The sections of the bid that follow this letter provide information on our firm and our staff, detail our proposed scope of work, the timing and cost to conduct the study, as well as our project references. This information is provided on the forms required for the proposal.

We hope you will find this proposal acceptable to the District, and the needs of its parents, students and teachers. If you have any questions, please do not hesitate to give me a call.

Sincerely,

Rick T. Brammer  
Principal
FORM NO. 1: CONSULTANT PROFILE

1. Lead Consultant Firm(s) (or Joint Venture) Name and Address:
   1a. Firm / Provider is: ___ National  X  Regional  ___ Local
   1b. Year Firm / Provider Established: 1995
   Years of Experience providing Demography Study Services? 24

1c. Licensed to do business in the State of Missouri:  X  Yes  ___ No

1d. Name, title, telephone number and email address of Principal to contact:
    Rick Brammer, Principal  602-765-2400  rbrammer@aeconomics.com

1e. Address of office to perform work, if different from Item No. 1:

2. Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District’s project:
   Principal Planner  Senior Associate
   GIS Technician

3. If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative and technical) for each firm:

   Landmarketing / Marketgraphics
   Local real estate project data and market information

   AND

   GuideK12
   Student Search on-line student information
   GuideK12 - Geovisual Analytics for Education

3a. Has this Joint Venture previously worked together?

We have worked with Landmarketing for more than 10 years, and have become familiar with the GuideK12 software suite, and its creators, through another client.

Bidder’s Initials RB
FORM NO. 2: KEY OUTSIDE CONSULTANTS

Each respondent must complete this form for all proposed sub-contractors.

SUBCONTRACTOR #1
Name & Address: Landmarketing LLC / MarketGraphics
14904 South Rosehill Road
Olathe, KS

Specialty/Role with this Project: Local real estate data and market information

Worked with Lead Firm Before: Yes Yes or No

Year Firm Established: 1999

Years of Experience providing Demographer Services? 10

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.

SUBCONTRACTOR #2
Name & Address: GuideK12
12301 Whitewater Drive, Suite 10
Minnetonka, MN 55343

Specialty/Role with this Project: Student Search on-line student information

GuideK12 - Geovisal Analytics for Education

Worked with Lead Firm Before: No Yes or No

Year Firm Established: 2012

Years of Experience providing Demographer Services? 7

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.

Bidder’s Initials RB
FORM NO. 3: EXPERIENCE/REFERENCES – APPLIED ECONOMICS LLC

Client Name & Address: Lee’s Summit R-7 School District
301 NE Tudor Road
Lee’s Summit, MO 64086

Dates of Service: 2002/03 through 2018/19

Client Contact Person, Title & Telephone Number:
Dr. Emily Miller
Assistant Superintendent
(816) 986-1009

Estimated Cost for Entire Contract: $13,500 per year

Scope of Entire Contract: Demographic Information
District Enrollment Projections
Sub-District Enrollment Projections
Facility Needs Assessment
Attendance Area Planning

Nature of Firm's/Provider’s responsibilities in contract:

Over the past several years the Lee’s Summit School District has been among the fastest growing districts in metropolitan Kansas City. To plan for this growth, Rick Brammer has been under contract to maintain a socioeconomic database and projection model for quarter-mile areas within the District. The database, which is an exhaustive inventory of population and housing data and a tracking system of existing, under construction, and planned development, produces projections of enrollment by grade by quarter-mile planning grid.

Projections for these small planning areas are used to assist the District with site location activities for new schools and for the development of attendance areas. The development of attendance areas is performed interactively with District staff and a facility planning committee using a districting extension for ArcGIS that enables point-and-click analysis of alternatives.

ENROLLMENT LONG-RANGE PLAN: Last Wednesday in September Projections

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Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District’s project:

Rick Brammer, Applied Economics
Christy Miller, Applied Economics
Dan Whitney, Landmarketing
FORM NO. 3: EXPERIENCE/REFERENCES – APPLIED ECONOMICS LLC

Client Name & Address: Liberty Public Schools
650 Conistor
Liberty, MO 64068

Dates of Service: 2007/08 through 2016/17

Client Contact Person, Title & Telephone Number:
Mr. Steven Anderson
Chief Operations Officer
(816) 736-5333

Estimated Cost for Entire Contract: $11,000 to $15,000 per year

Scope of Entire Contract: Demographic Information
District Enrollment Projections
Sub-District Enrollment Projections
Attendance Area Planning

Nature of Firm's/Provider’s responsibilities in contract:

The Liberty School District area has been growing and changing in character. Applied Economics was been retained to maintain a socioeconomic database and projection model for the District and sub-areas within the District. The socioeconomic database includes inventory of population and housing data, existing and future land use data and a tracking system of existing, under construction, and planned development.

The enrollment projections are used to assist the District with staffing, site location activities for new schools, and for development of attendance areas. The development of attendance areas is performed by District staff with support from Applied Economics.

ENROLLMENT CHANGE: 2007 - 2012

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District's project:

Rick Brammer, Applied Economics
Christy Miller, Applied Economics
Dan Whitney, Landmarketing
FORM NO. 3: EXPERIENCE/REFERENCES – APPLIED ECONOMICS LLC

Client Name & Address: St. Joseph School District
925 Felix Street
St. Joseph, MO 64086

Dates of Service: 2007/08 through 2014/15

Client Contact Person, Title & Telephone Number:
Mr. Rick Hartigan
Assistant Superintendent
(816) 671-4000

Estimated Cost for Entire Contract: $11,000 to $15,000 per year

Scope of Entire Contract: Demographic Information
District Enrollment Projections
Sub-District Enrollment Projections
Facility Needs Assessment

Nature of Firm's/Provider’s responsibilities in contract:

Applied Economics performed an extensive analysis of demographic trends in small-areas within the District, and of the flow of students to develop projections of enrollment by grade for ten years for the District and for District sub-areas. The demographic analysis focused on housing inventory characteristics and the age distribution of residents to predict the change in the student population in each sub-area. This is particularly important because enrollment is increasing in some parts of this long-established District while declining in others. Major tasks performed included collecting current and historic demographic and housing data, analyzing and projecting student generation and capture rates and projecting District-level and small-area enrollment by grade for 10 years. Projections for these small planning areas are used to assist the District with site location activities for new schools and for the development of attendance areas.

CURRENT RESIDENTIAL DEVELOPMENTS

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District’s project:

Rick Brammer, Applied Economics
Christy Miller, Applied Economics
FORM NO. 3: EXPERIENCE/REFERENCES – APPLIED ECONOMICS LLC

Client Name & Address: Dysart Unified School District
15802 North Parkview Place
Surprise, AZ 85374

Dates of Service: 1998/99 through 2018/19

Client Contact Person, Title & Telephone Number:
Mr. Kevin Shipman
Planning Administrator
(623) 876-7976

Estimated Cost for Entire Contract: $18,000 per year

Scope of Entire Contract:
Demographic Information
District Enrollment Projections
Sub-District Enrollment Projections
Attendance Area Planning

Nature of Firm's/Provider’s responsibilities in contract:

The Dysart Unified School District has been among the fastest growing districts in metropolitan Phoenix over the last 20 years. To plan for this growth, Rick Brammer has been under contract since 1998 to maintain a socioeconomic database and projection model for quarter-mile areas within the District. The database, which is an exhaustive inventory of population and housing data and a tracking system of existing, under construction, and planned development, produces projections of enrollment by grade by quarter-mile planning grid.

Projections for these small planning areas are used to assist the District with site location activities for new schools and for development of attendance areas. The development of attendance areas is performed interactively with District staff using a districting extension for ArcView that enables point-and-click analysis of alternatives. Presentations are made to the senior staff twice each year and once each year to the governing board. In addition, Applied Economics participates in community meetings on an as-needed basis.

FUTURE LAND USE

Firms/Providers Personnel (Name/ Project Assignment)
Who worked on the stated project that shall be assigned to the District's project:

Rick Brammer, Applied Economics
Don Graves, Applied Economics
FORM NO. 3: EXPERIENCE/REFERENCES – APPLIED ECONOMICS LLC

Client Name & Address: Paradise Valley Unified School District
15002 N. 32nd Street
Phoenix, AZ 85032

Dates of Service: 2007/08 through 2018/19

Client Contact Person, Title & Telephone Number:
Ms. Laura Felton
Assistant Superintendent
(602) 449-2030

Estimated Cost for Entire Contract: $18,000 per year

Scope of Entire Contract:
- Demographic Information
- District Enrollment Projections
- Sub-District Enrollment Projections
- Attendance Area Planning

Nature of Firm's/Provider’s responsibilities in contract:

Applied Economics performed an extensive analysis of demographic trends in small-areas within the District, and of the flow of students into and out of the District, to develop projections of enrollment by grade for ten years for the District and for District sub-areas of approximately one-quarter section (160 acres). The demographic analysis focused on housing inventory characteristics and the age distribution of residents to predict the change in the student population in each sub-area. This is particularly important because enrollment is increasing in some parts of the District while declining in others. Major tasks performed included collecting current and historic demographic and housing data, analyzing and projecting student generation and capture rates and projecting District-level and small-area enrollment by grade for 10 years. Applied Economics also assists the District in facility and attendance planning having helped create attendance areas for new schools, and consolidate attendance areas for school that were closing.

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District’s project:

Rick Brammer, Applied Economics
Don Graves, Applied Economics
FORM NO. 3: EXPERIENCE/REFERENCES – APPLIED ECONOMICS LLC

Client Name & Address: Tempe Union High School District
500 W. Guadalupe Road
Tempe, AZ 85283

Dates of Service: 1993/94 through 2018/19

Client Contact Person, Title & Telephone Number:
Ms. Diane Meulemans
Assistant Superintendent
(480) 345-3711

Estimated Cost for Entire Contract: $12,500 per year

Scope of Entire Contract:
Demographic Information
District Enrollment Projections
Sub-District Enrollment Projections
Attendance Area Planning

Nature of Firm's/Provider’s responsibilities in contract:

Applied Economics has been involved in planning for the Tempe Union High School District since the peak of its growth period in the 1990’s. During that time Applied Economics has provided annual updates of demographic and development conditions, as well as both District-level and small-area enrollment projections. These projections have been used in a wide variety of planning efforts from budgeting, to marketing, to strategic planning, to facility and attendance area planning. Part of maintaining the demographic program over this extended period of time has been to establish good working relationships with the staff and leadership at the elementary feeder districts.

The demographic analysis focuses on housing inventory characteristics and the age distribution of residents to predict the change in the student population in each sub-area. This is particularly important because enrollment is increasing in some parts of the District while declining in others. Major tasks performed included maintenance of the demographic planning database, revising the enrollment projections and presenting this finding to District leadership.

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District’s project:

Rick Brammer, Applied Economics
Don Graves, Applied Economics
FORM NO. 3: EXPERIENCE/REFERENCES – GUIDE K12

Client Name & Address: Rapides Parish School District
4411 Whitefield Road
Alexandria, LA 71301

Dates of Service: 2014 through present

Client Contact Person, Title & Telephone Number:

Mr. Luke Purdy
Director of Technology
Luke.pundy@rpsb.us
(318) 487-0888

Estimated Cost for Entire Contract: $32,765

Scope of Entire Contract: GuideK12 Suite

Nature of Firm's/Provider’s responsibilities in contract:

The Entire GuideK12 suite – 4 modules including School Search

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District’s project:

GuideK12, Dan Och, Director of Customer Experience
GuideK12, James Spoden, Customer Experience
FORM NO. 3: EXPERIENCE/REFERENCES – GUIDE K12

Client Name & Address: Wayzata Public Schools
                     210 County Road 101 N
                     Plymouth, MN 55391

Dates of Service: 2011- present

Client Contact Person, Title & Telephone Number:

Mr. Jim Westrum
Director of Finance and Business Services
Jim.westerum@wayzataschools.org
(763) 745-5000

Estimated Cost for Entire Contract: $21,506

Scope of Entire Contract: GuideK12 software suite

Nature of Firm's/Provider’s responsibilities in contract:

Provided School with full version of GuideK12 software suite. Includes planning information and analysis, and the School Search module to help parents identify the school for their students and provide information on each school in the district.

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District’s project:

GuideK12; Dan Och
FORM NO. 4: RESUME OF KEY PERSONNEL – APPLIED ECONOMICS LLC

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District’s Demography Study project:

a. Name and Title: Rick Brammer
   Planning Principal

b. Assignment: Project Manager
   Principal Analyst

c. Name of Firm with which associated: Applied Economics LLC

d. Years of Experience:
   With this firm ___24___ other firms ___9___

e. Education: Degree(s) or Certification(s)/Year/Specialization:
   B.S., Computer Science and Economics, University of Oregon

f. Current Registration(s): None

g. Other Experience & Qualifications relevant to the proposed project:

    Prepared demographic analyses, enrollment projections and facility demand analyses for over 50 school districts. In providing these services he:
    
    • Assembled database and spreadsheet models to analyze and predict trends in housing, population and enrollment for school districts and other sub-metro areas;
    
    • Created simulation models to predict the pattern of population and enrollment change within school districts using small-area development and demographic information;
    
    • Developed site location and attendance area recommendations using small-area projections and geographic information system (GIS) tools;
    
    • Assisted in the development of numerous attendance area / facility utilization plans having served both large and small districts in urban, suburban and rural areas; and
    
    • Worked with many planning committees, school boards and other public group in both small-group meetings and open public forums.
FORM NO. 4: RESUME OF KEY PERSONNEL – APPLIED ECONOMICS LLC

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District’s Demography Study project:

a. Name and Title:  
   Christy Miller  
   Senior Associate

b. Assignment:  
   Data Collection  
   Report Preparation

c. Name of Firm with which associated:  
   Applied Economics LLC

d. Years of Experience:  
   With this firm ___11___ other firms ___15___

e. Education: Degree(s) or Certification(s)/Year/Specialization:  

f. Current Registration(s):  
   None

g. Other Experience & Qualifications relevant to the proposed project:

   • Conducted primary and secondary research on a variety of demographic and economic development-related projects, involving the organization and analysis of data, database management and worksheet development, conducting interviews, and document preparation.

   • Coordinated the collection of data to facilitate ongoing comparisons of metropolitan areas for state and regional economic development organizations nationwide. Applicable research included gathering infrastructure service rates (water, sewer, electricity, and gas), tax rates, occupational wage data, labor market, demographic, and educational statistics, market access information, and other quantitative economic and business climate information.

   • Participated in the research and document preparation associated with the development of numerous school district studies. Applicable research activities included gathering data on enrollment, alternative providers, demographic and housing characteristics, regional population growth trends, land use and planned development activity, and housing characteristics in the target areas.
FORM NO. 4: RESUME OF KEY PERSONNEL – APPLIED ECONOMICS LLC

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District’s Demography Study project:

a. Name and Title:  
   Don Graves  
   GIS/Database Analyst

b. Assignment:  
   Database Updates  
   Mapping

c. Name of Firm with which associated:  
   Applied Economics LLC

d. Years of Experience:
   With this firm __15__ other firms __20__

e. Education: Degree(s) or Certification(s)/Year/Specialization:
   Associate of Arts, Spoon River College, Canton, IL. 1974.
   Board of Governors Program: Sociology and Economics
   Western Illinois University, Macomb, IL.

f. Current Registration(s):  
   None

g. Other Experience & Qualifications relevant to the proposed project:

   • Performed analysis of the factors affecting real estate development and with 10-year forecasts of new residential construction by type and location for numerous school districts.

   • Utilized geographical information system (GIS) technology to conduct spatial analysis of land development.

   • Developed a MS-Access computer database system to track development data, with forms designed to facilitate housing projections by allowing multiple data filters and cross-checks.

   • Written reports to clients to clearly present and explain the data and analysis used in their projects. These reports have frequently been followed by public presentations utilizing graphics and extemporaneous explanations for specific areas of interest.

   • Designed and created a custom MS-Access database application to track building permit and housing market information for the Arizona State University Real Estate Center. This system was in use for 11 years, includes VBA code to facilitate data import and export, error trapping, and report generation. Related databases were developed to maintain data on the metropolitan office and retail markets.
FORM NO. 4: RESUME OF KEY PERSONNEL – LANDMARKETING

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District’s Demography Study project:

a. Name and Title: Dan Whitney  
Owner

b. Assignment: Detailed Real Estate Market Information  
Housing Construction Forecasts

c. Name of Firm with which associated: Landmarketing / MarketGraphics

d. Years of Experience:  
With this firm 15  other firms 15

e. Education: Degree(s) or Certification(s)/Year/Specialization:  
Bachelor of Landscape Architecture  
Kansas State University, 1985

f. Current Registration(s): None

g. Other Experience & Qualifications relevant to the proposed project:

   Dan Whitney brings 19-years of homebuilding industry experience and consulting to the task of helping new home communities succeed. His combined degrees in Landscape Architecture and Marketing give him a unique vantage point from which to evaluate land development patterns as they relate to current conditions and demographic trends.

   Prior to forming Landmarketing, Dan was responsible for the design, positioning, product selection, feasibility and zoning approval for many communities as a Regional Land Manager for a top-five national homebuilder. In that position, he was a client of MarketGraphics and Dan saw how MarketGraphics assists with a wide range of private sector and institutional clients refine their growth strategies with current, accurate housing research and data. Dan is the licensee for MarketGraphics for the Kansas City and Omaha/Lincoln metropolitan areas and is a licensed real estate broker in Kansas and Missouri.

   As an expert in new home market research Dan is a member of many committees and associations in the Kansas City area, and is frequently advising and presenting to numerous boards, associations, and seminars.
FORM NO. 4: RESUME OF KEY PERSONNEL – GUIDEK12

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District’s Demography Study project:

a. Name and Title:  
Dan Och  
Director of Customer Experience

b. Assignment:  
Customer Support  
GuideK12 System Setup

c. Name of Firm with which associated: GuideK12

d. Years of Experience:  
With this firm ___6___ other firms ___15___

e. Education: Degree(s) or Certification(s)/Year/Specialization:  
Bachelor of Arts  

f. Current Registration(s): None

g. Other Experience & Qualifications relevant to the proposed project:  
Dan expertly fills the role of Customer Experience Director for GuideK12 geovisual analytics technology. He has ability to put customer concerns at ease by addressing the issue directly and transparently. Dan is an exceptional GIS guru and one you can count on to get the job done and done well.
FORM NO. 4: RESUME OF KEY PERSONNEL – GUIDEK12

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District’s Demography Study project:

a. Name and Title:  
James Spoden  
GIS Technician

b. Assignment:  
Data Migration  
GuideK12 Setup  
Customer Support

c. Name of Firm with which associated: GuideK12

d. Years of Experience:
   With this firm ___3___ other firms ___14___

e. Education: Degree(s) or Certification(s)/Year/Specialization:
   Bachelor of Arts

f. Current Registration(s): None

g. Other Experience & Qualifications relevant to the proposed project:

   A GIS specialist with fourteen years of work experience within the Public Safety industry, Mr. Spoden is a self-motivated and detail oriented expert in all ArcGIS platforms and MapInfo software. While maintaining map data, I performed geocodes and analyses with ArcTools and custom tools by GeoComm. He is proficient using Microsoft Word, Excel, Office, and Citrix Software including Go to Meeting and Go to Assist. James is also proficient in field collection using ArcPad, and Trimble units. Recently, and has assisted with applying map updates to 9-1-1 dispatch workstations.
FORM NO. 5: PROJECT NARRATIVE

The purpose of this scope of work is to provide annual updates of the District’s Demographic and Enrollment Study, facility planning assistance as necessary, and optionally, advanced geovisual analytic tools through GuideK12. Our proposed approach for the Lee’s Summit R-7 School District is based on the same basic set of tasks conducted in previous District updates that have provided very accurate forecasts of enrollment to the Lee’s Summit R-7 School District.

The sections that follow detail our proposed scope, timing and fee to update enrollment projections, assist with attendance area recommendations and provide geovisual analysis tools. The enrollment projection update appends current year student information to the database of District enrollment data we have been compiling since 2002/03. This long time series of enrollment data provides an opportunity to evaluate trends and refine the small-area projections. However, we are always willing to adjust our services to meet the needs of the District.

Major work items under this proposal include:

- Obtaining and loading student information;
- Updating absorption information for active residential projects;
- Updating the survey of future residential potential;
- Reviewing student generation and survival rates;
- Projecting District-level enrollment by grade for 10 years;
- Projecting small-area enrollment by grade for 10 years;
- Presenting results to the Governing Board, SLT or a boundary committee (as needed);
- Assist in facility location/utilization and school attendance area planning (as needed);
- Optionally providing some or the entire GuideK12 software suite.

Task 1 – Update Planning Database

1.1 Enrollment and Demographic Data

The scope of work for Task 1 begins with obtaining current student enrollment data from the District including latitude and longitude for each student. This information will be processed to calculate total District enrollment by grade and facility, and then assigned to the planning grids to re-assess the relationship between housing inventory, household characteristics and enrollment at the small area level. Maps will be prepared showing the current distribution of students and how that distribution has changed over time. We will also collect and examine trends in live birth statistics for the District, and sub-areas as possible, for use in the kindergarten projections.

1.2 Development Data

This task involves updating the information on residential development activity and potential. This includes active residential projects and vacant land that could result in residential development in the next 10 years or so. For active residential projects, we will obtain current housing inventory and absorption rate information from the Market Graphics report generated by Landmarketing, Inc, a regional vendor of residential development information.
We will also need to meet with Planning Department representatives from the City of Lee’s Summit, City of Kansas City, Town of Greenwood, City of Blue Springs, Lake Lotawana, Lake Winnebago, Unity Village and Jackson County to identify and track planned and proposed residential projects within District boundaries. These discussions normally result in the need to follow-up with landowners, developers or builders to update the information on the current specifications and anticipated timing of their projects.

**Task 2 – Absorption, Survival, and Generation Rates**

In Task 2 we will update absorption projections for active and planned residential projects in the District based on their performance over the past year, and review detailed model assumptions including student survival and generation rates. Absorption projections for the District will be based on regional economic trends and detailed data on building activity from Landmarketing. District-level absorption is allocated to individual projects based on past performance, current status and expected competition.

For the student survival rates, we will incorporate the current year’s student data into the analysis of the overall progression of the District student population by grade level and school. We will also review the changes to the survival rates for consistency with District and sub-district level demographic and housing trends.

Finally, we will review the per-housing-unit student generation rates developed for District sub-areas and adjust rates on future projects accordingly. Using the difference between the school-age population and the enrollment data for the District we can estimate the school-age population being served by other providers including private and parochial schools, magnet schools and home schooling. We can also quantify the net movement of students between campuses, i.e. the difference between enrollment by attendance area and enrollment by school.

**Task 3 – District Enrollment Projections**

Using past enrollment data and current development, absorption, and student generation and survival data, we will prepare long-term (10-year) enrollment projections by grade for the Lee’s Summit School District. We will be using a modified cohort-survival model developed by Applied Economics that specifically accounts for the impact of new development, while at the same time adjusting for observed trends in student generation and survival rates. This model uses a top-down, macroeconomic approach to development of enrollment projections that ensures consistency with the long-term demographic trends and supply-demand patterns of the District. These projections are sometimes modified based on the results of the small-area enrollment projections described in the next section. This creates an internal crosscheck of the enrollment projections using two different methodologies.

**Task 4 – Small-Area Enrollment Projections**

In Task 4, new student and development data are combined with assumptions about absorption, and student generation, survival and capture to prepare sub-area enrollment projections for the Lee’s Summit R-7 School District. Census data will be leveraged to refine these calculations, and updated through the 2016 American Community Survey. The projections will be broken down to the small-area geographies developed in our previous work for the District. This provides sufficient detail to perform facility and attendance area planning.
The future student population will be based on the current student population, student generation and capture rates, and projected housing unit increases or decreases. The model translates future housing inventory into projected student population by analyzing the types of units and the demographic characteristics of the population likely to inhabit them. This model creates bottom-up projections that are compared with, and sometimes modified based on, the results of the district enrollment projections.

**Task 5 – Documentation and Presentations**

The results of the Demographic and Enrollment Analysis will be transmitted to the District in an executive summary style written report. This report will make extensive use of tables and charts to illustrate key input data and findings. The report will also include maps that show the existing distribution of students in the District, active and potential residential development areas, and future enrollment growth patterns.

If the boundary planning option is elected, we will also create a PowerPoint presentation from the report. During the on-site visit to set up the District redistricting software, we would be available to present the findings of the Demographic and Enrollment Analysis to District leadership or the Superintendent’s Leadership Team, and the boundary planning committee under the cost estimate included in Task 5.

**Task 6 – Facility and Boundary Planning Assistance (optional)**

The Applied Economics team will be available to assist in all manner of facility and attendance area planning efforts as required. Based on the small-area enrollment projections and facility capacity and utilization assumptions, we could assist the facilities and other planning committees in the development of school attendance areas to serve the District. The enrollment projections will provide a basis for determining the number of needed required, as well as detail on where, when and at what grade levels. Using GIS, this information can be manipulated interactively in real time with the working group. The value is in being able to work through everyone’s ideas and preconceived notions, clearly showing what works and what does not. Attendance area planning is typically more near-term than facility planning, although establishing boundaries that can remain fixed for an extended period of time is always desirable. Therefore, accurate sub-district projections are very important.

Our firm will coordinate the efforts of our team, performing analyses of specific issues and providing information for use in GuideK12. Applied Economics will also be available to make limited presentations of demographic, enrollment and development information in support of planning efforts. The GuideK12 software suite will enable District staff to perform all manner of what-if analyses, and generate exhibits for public participation. Since the nature and exact scope for this task are unknown at this time, we would provide a separate quote for such services if and when the need arises.

**Task 7 – GuideK12 Software (optional)**

The GuideK12 geovisual analytics suite is cloud based and consists of four modules that will meet the needs of the district very well. Role based security allows the district to provide access to an unlimited number of users within the district. Explorer is the first module and it allows for detailed analysis of any data stream and characteristics contained within, including the ability to create reports of selected areas with details or output for communication services. Planner is the second module and is a module
designed exclusively for boundary planning and scenario creation. All the logic is tracked for every scenario allowing transparent discussions and analysis. The results of any scenario are instantly able to be examined through the dashboard as well as reports showing all the changes and impacts (demographics, capacity, feeder patterns, etc.) Third, Adviser is a reporting and graphing module that allows for visually appealing reports without the hassle of Excel, just simple drop-down selections. And lastly, SchoolSearch is the easiest to use address tool on the market and mobile friendly. GuideK12 SchoolSearch is completely customizable, allowing you to showcase different programs, offerings, transportation and new boundaries clearly for the public. GuideK12 provides a link to place on the district’s website for easy access.

GuideK12 prides itself on the accuracy of the geo-coding of every student to the roof-top level ensuring confidence when making zone changes. GuideK12’s ability to interface with PowerSchool allows daily feeds of student data for very timely analysis, along with monthly snapshots for boundary planning against a consistent data set and yearly snapshots for longitudinal analysis. Shapefiles can be easily uploaded or provided to the district after created within GuideK12.

GuideK12 helps district administrators make more effective and efficient decisions on topics such as: boundary planning, opening new schools, voter analysis, analyzing demographics and socio-economics, open enrollment trending, resource placement, student needs assessments, state test performance, emergency planning, and natural disaster planning. Through the visualization of disparate data sets, it becomes easy to understand and discuss complex topics. For the broader community, GuideK12 offers an online look up tool with advanced search functionality allowing parents, realtors and community members to find the school closest to their home as well as the offerings most desirable to their families. GuideK12 is an invaluable tool for school board discussions, community meetings and anywhere transparency of data is critical for building consensus and trust.

**Proposed timeline for implementation of contract**

We would propose making our data collection trip during the week of August 26th. This will ensure that the new development information will be ready for the projections as soon as the new student data is available. We would continue to ask that the student data be captured on the same day that the data is pulled for annual facility and budget planning calculations. Based on getting this data in late-September, we could have our draft report complete in late October. GuideK12 is available to begin work on setting up a system for Lee’s Summit R-7 School District as soon as an option is selected.

**Proposed communication process**

Applied Economics will be the point of contact for the demographic study update and all administrative issues, and GuideK12 will provide support for that system. Applied Economics will provide a draft report for review by the District by the end of October, and be available to make one on-site presentation to the District leadership or the Board of Education.
FORM NO. 6: PRICING: Demography Study Services
Based on all items included in Specifications

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* Based on $4,700 setup fee, and $1.40 per student annually (estimated for 18,200 students).

Respondent must complete the following section in its entirety and sign and date where indicated. This agreement shall take effect upon the approval of the District.

The undersigned respondent hereby proposes to furnish all transportation, equipment, supplies, materials and perform all necessary labor to complete all work stipulated in, required by, and in conformity with the proposed agreement documents and specifications attached hereto and other documents referred to therein for and in consideration of prices as follows:

A. **Acceptance of proposal by District:** The District shall have maximum ninety (90) calendar days from the date of the proposal opening to accept respondent’s offer.

B. **Response time/delivery:** As specified in requirements

C. **District standard payment terms are Net 30 after receipt of invoice. Payment terms are negotiable.**

Please state any discounts offered: __________________________________________

D. **Submittals:** The following must be submitted with proposal

1. References and experience
2. Personnel Qualifications
3. Certificate of Insurance
4. Return all parts of this complete document (respondents to keep copy of proposal submitted)

Signature:

Typed Name and Title: Rick Brammer, Principal
Telephone Number: 602-765-2400 x103
Date: 7/1/2019

Bidder's Initials RB
W-9 FORM

Form W-9

Identify the request. Do not send to the IRS.

Name (as shown on your income tax return):
Applied Economics LLC

Business name as registered entity name, if different from above:

Check appropriate box for federal tax classification:

- Partnership
- S Corporation
- C Corporation
- Limited liability company

Exempt payee

Social security number

Employer identification number

Part I

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

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

Part II

Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or if I am waiting for a number to be issued to me), and

2. I am not subject to backup withholding because (a) I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (b) the IRS has notified me that I am no longer subject to backup withholding; and

3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

Signature of person authorizing the principal

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person including a resident alien, to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),

2. Certify that you are not subject to backup withholding, or

3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners’ share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester’s form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

• An individual who is a U.S. citizen or U.S. resident alien,

• A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,

• An estate (other than a foreign estate), or

• A domestic trust (as defined in Regulations section 301.7701-9).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners’ share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.
E-VERIFICATION AFFIDAVIT

Lee's Summit R-VII School District
301 NE Tudor Road
Lee's Summit, Missouri 64066
(816) 986-1000 • FAX (816) 986-1168

Business Services

As a condition for any service provided to the Lee's Summit R-VII School District, a business entity shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services.

Every such business entity shall complete the following affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contract services. [RSMO 285.530 (2)]. The completed affidavit must be returned as part of the contract documentation or mailed to Lee's Summit R-VII School District, Attn: Accounts Payable, 301 NE Tudor Road, Lee's Summit, Missouri 64066.

This affidavit affirms that Applied Economics LLC (Company Name) is enrolled in, and is currently participating in, E-verify or any other equivalent electronic verification of work authorization operated by the United States Department of Homeland Security under the Immigration Reform and Control Act of 1986 (IRCA); and Applied Economics LLC (Company Name) does not knowingly employ any person who is an unauthorized alien in connection with the contracted services.

Rick Brammer

Name (Please Print) of registered agent, legal representative or corporate officer

Principal

Title

Signature of registered agent, legal representative or corporate officer

Subscribed and sworn to before me this__5__ of __July_ __2019__ I am commissioned as a notary public within the County of __Maricopa__ State of __Arizona__ and my commission expires on __March 14, 2022__

Signature of Notary

Date

Failure to respond will cause payments due to you to be held until affidavit is received. Once the affidavit is received, payments will be released.

Charlotte Stone
Notary Public - Arizona
Maricopa County
My Comm. Expires Mar 14, 2022

Bidder’s Initials RB
CERTIFICATE OF LIABILITY INSURANCE

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFEES NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURANCE(s), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
STATE FARM INSURANCE, JORDAN BOWDEN
10245 E VIA LINDA STE 101
SCOTTSDALE, ARIZONA 85258

INSURED
APPLIED ECONOMICS, LLC
11209 N TATUM BLVD STE B225
PHOENIX, ARIZONA 85028-3091

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| WORKERS COMPENSATION | 93-CJ-G757-7 | 09/02/2018 | 09/02/2019 | EACH OCCURRENCE |

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<th>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER INCLUDED?</th>
<th>Y/N</th>
<th>Y</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>If yes, describe under DESCRIPTION OF OPERATIONS below</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Business Office | 93-GA-0839-8 | 06/30/2019 | 06/30/2020 | Business Property: Cov B- "Special Form" Business Income and Extra Expense - 12 Months or Actual Loss Insured |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

AUTHORIZED REPRESENTATIVE

© 1988-2014 ACORD CORPORATION. All rights reserved.
REQUEST FOR PROPOSAL FOR DEMOGRAPHY STUDY SERVICES
RFP NO. 2019-47

IN ACCORDANCE WITH THE ATTACHED SPECIFICATIONS

PROPOSALS MUST BE RECEIVED BY 3:00 PM (CST) ON JULY 5, 2019.

The cutoff date for any written questions for this RFP is June 26, 2019 at 12:00 PM (CST).

It is the responsibility of interested firms to check www.publicpurchase.com for any addendums or notices of information prior to the opening date and time of this RFP. All addendums must be signed and included with your submitted proposal.

The undersigned certifies that he/she has the authority to bind this company in an agreement to supply the commodity and/or services in accordance with all terms, conditions, and pricing specified herein or to offer a “no response.” Please type or print the information below. The Respondent is REQUIRED to complete, sign and return this form with your submitted response for this RFP.

Applied Economics LLC

Company Name

11209 N. Tatum Blvd., Suite 225

Address

Phoenix, AZ  85028

City/State/Zip

602-765-2400 x103  602-765-2407

Telephone #  Fax #

rbrammer@aeconomics.com

E-mail

Rick Brammer

Authorized Person (Print)

Signature

Principal

Title

July 1, 2019  46-4831002

Date  Tax ID #

LLC – S Corp

Entity Type (Corporation, LLC, Sole Proprietor, Partnership)

If submitting a "no proposal" please provide a brief explanation for the reason why and return this page:

Bidder's Initials  RB
TABLE OF CONTENTS

REQUEST FOR PROPOSAL FOR DEMOGRAPHY STUDY SERVICES ...................................................... 1
TABLE OF CONTENTS .............................................................................................................................. 2
LEGAL NOTICE .......................................................................................................................................... 2
1.0 INSTRUCTIONS TO RESPONDENTS: ............................................................................................... 3
2.0 SPECIFIC REQUIREMENTS OF RFP: ................................................................................................ 4
3.0 SPECIFICATIONS: ................................................................................................................................ 5
4.0 SCHEDULE OF RFP PROCESS AND PROJECT COMPLETION: .................................................... 6
PROPOSAL RANKING SHEET ................................................................................................................. 7
PROPOSAL PAGE ....................................................................................................................................... 8
COOPERATIVE PROCUREMENT WITH OTHER JURISDICTIONS: ................................................... 9
FORM NO. 1: CONSULTANT PROFILE ................................................................................................. 10
FORM NO. 2: KEY OUTSIDE CONSULANTS ...................................................................................... 11
FORM NO. 3: EXPERIENCE/REFERENCES .......................................................................................... 12
FORM NO. 4: RESUME OF KEY PERSONNEL .................................................................................... 13
FORM NO. 5: PROJECT NARRATIVE .................................................................................................. 14
FORM NO. 6: PRICING: Demography Study Services ............................................................................. 15
GENERAL TERMS AND CONDITIONS ................................................................................................. 16
W-9 FORM ................................................................................................................................................. 24
E-VERIFICATION AFFIDAVIT ................................................................................................................. 25

LEGAL NOTICE
REQUEST FOR PROPOSAL #2019-47 FOR DEMOGRAPHY STUDY SERVICES

The Lee’s Summit R-7 School District is accepting proposals for Demography Study Services. Specifications, terms, and conditions are specified in the RFP packet. The RFP and required specifications can be found on the District’s website in the Purchasing & Distribution Services Department as well as the Public Purchase website. Proposals must be uploaded to Publicpurchase.com no later than 3:00 PM on July 5, 2019.
SCOPE: The Lee’s Summit R-VII School District is soliciting proposals for a yearly contract for Demography Study Services. This contract will include but is not limited to a Demographic Enrollment Study with an oral and written report to our Board that details District boundary and grid geography; current and historical enrollment; demographic trends; developmental potential; District and small area projections.

1.0 INSTRUCTIONS TO RESPONDENTS:

1.1 All questions regarding this RFP shall be submitted in writing to the District’s Public Purchase website. The District reserves the right to reject any and all proposals, to waive technical defects in proposals, and to select the proposal(s) deemed most advantageous to the District.

1.2 Proposals submitted on separate forms are NOT acceptable unless specified in the document. Failure to complete forms to the satisfaction of the District may result in the rejection of your proposal.

1.3 It is the responsibility of each respondent before submitting a proposal to examine the documents thoroughly and request written interpretation or clarifications soon after discovering any conflicts, ambiguities, errors, or omissions in the proposal documents. Requests for clarification must be received in writing through the Public Purchase website no later than June 26, 2019 at 12:00 PM (CST).

1.4 Changes to the specifications will not be allowed except by written addendum issued by the District through the Public Purchase website. Oral explanations or instructions given prior to award will not be binding.

1.5 Respondent shall quote net costs of all goods and services requested and all quotes shall include all transportation to destination and inside delivery.

1.6 There will be no public opening of the proposals.

1.7 Acceptance of this proposal or any part thereof, in writing, within ninety (90) days after the closing date, by the District shall constitute a legal and binding agreement; wherein, the vendor shall furnish the services in accordance with the specifications and offeror’s proposal on the written order of the District.

1.8 The District reserves the right to award this contract in its entirety or to split the contract among bidders, whichever is in the best interest of the District. The District may accept any item or group of items of the bid unless qualified by specific limitation of the bidder.

1.9 Respondents shall initial all pages where the proposal document denotes “RESPONDENT’S INITIALS: ____”.

1.10 To be considered, a firm must have at least three (3) proven clients of similar size to our district.

1.11 SELECTION PROCESS

The proposals will be evaluated by a District Selection Committee (DSC) comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview, if applicable.

Step One: Evaluation of Proposals

Members of the DSC will review and rate each responsive proposal based on the following criteria:
a. The firm's experience in providing similar services to school districts or governmental agencies during the past five (5) years.

b. Key personnel that will be assigned to the District’s project, and their experience with similar projects.

c. Applicable resources offering quality assurances/quality control procedures; as well as adequacy of team/resources to complete the project within the proposed timeframe.

d. Project approach including project schedule and detailed approach to complete this project, familiarity with this project, identification of unique issues related to project, and the process proposed for communications with District staff.

e. Cost (up front submitted with proposal-see Form 6)

The Proposal Ranking Sheet for the evaluation of the proposals is included in this RFP. The DSC may request additional submittals.

2.0 SPECIFIC REQUIREMENTS OF RFP:

2.1 Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee’s Summit R-VII Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, and service, and determined to be in the best interest of the District. The RFP award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the proposal that is in the best interest of the District.

2.2 This contract shall commence on July 26, 2019 unless otherwise stipulated on a specific order issued by the District. The agreement shall remain in effect through July 24, 2020. The District reserves the right to renew and extend the executed agreement pertaining to all prices, terms and conditions and specifications upon mutual agreement between the District and vendor(s) for an additional one (1) year period, but not to exceed three (3) additional one (1) year periods, for a total of four (4) years. Adjustments in cost at the beginning of each renewal period will be limited to the current Federal Consumer Price Index “CPI-U, All Items” (Urban Consumers) rate.

If the Vendor requests an increase in compensation for any renewal period, the Vendor shall notify the Purchasing Department no less than sixty (60) days prior to the end of the contract period and shall provide evidence to the satisfaction of the Purchasing Department of increased costs incurred by the Vendor for any element of the bid for which an increase is requested. It shall be understood that the District reserves the right to reject any price adjustments submitted by the bidder and/or to terminate the contract with the bidder based on such price adjustments.

The Purchasing Department shall notify the Vendor in writing of the intent to exercise the renewal option. However, failure to notify the Vendor does not waive the District’s right to exercise the renewal option.

2.3 The successful respondent(s) must agree to accept the District’s Purchase Order or the District’s Visa P-card for the order. These purchases are tax exempt.

2.4 RFPs must be uploaded to Publicpurchase.com no later than 3:00 PM on July 5, 2019. Please note, registration with Public Purchase can take up to 36 hours, so do not wait until the day of the RFP closing to register and upload your proposal.
2.5 The Lee’s Summit R-VII School District will review all proposal submissions with regards to pricing, product performance, and equipment features. The District plans to award the RFP within 30 days after the RFP opening.

3.0 SPECIFICATIONS:

Demographic information to collect and report shall include, but not be limited to the following:

District boundary and grid geography

Current and historical enrollment
   Historic enrollment and growth rate
   Historic enrollment by grade level
   Average enrollment by grade and grade span
   Geographic distribution of students
   Change in enrollment patterns

Demographic trends
   Population and housing trends
   Housing construction
   New units (single family and multifamily)
   Number of building permits issued
   New home closing by project or development with longitudinal data

Developmental potential
   Potential new housing unit timeline (now active, in 1 yr, 2-3 yr, 3-5 yr, 5 or more)
   Geographic depiction of major projects and known development
   Geographic depiction of land use and timing

District Projections
   Population & housing information
   Student generation rates
   Enrollment by elementary, middle & high school

Small Area Projections
   Development
   Enrollment
4.0 SCHEDULE OF RFP PROCESS AND PROJECT COMPLETION:

4.1 Timeline for RFP Process:

The timeline listed below is the District’s estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to change due to different circumstances.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Notification</td>
<td>June 13, 2019</td>
</tr>
<tr>
<td>Receive Proposals</td>
<td>July 5, 2019</td>
</tr>
<tr>
<td>Meet to review</td>
<td>July 8, 2019</td>
</tr>
<tr>
<td>School Board</td>
<td>July 25, 2019</td>
</tr>
<tr>
<td>Notice to Proceed</td>
<td>July 26, 2019</td>
</tr>
</tbody>
</table>

4.2 Timeline of Contract Execution:

The District desires the execution of the contract to meet the following dates: Services need to begin upon approval at the July 25, 2019 board meeting.
## PROPOSAL RANKING SHEET

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Maximum Points</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Evidence of Experience &amp; References with Similar Accounts (Ref &amp; Exp)</td>
<td>30</td>
<td>_____</td>
</tr>
<tr>
<td>Consider experience and references listed by the firm/provider. Is the firm/provider experienced in providing services similar to that requested in this RFP?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Familiarity and experience with similar projects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Consider the number of years of experience the firm/provider has.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Consider the number of years the firm has been in business.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Consider the references given by the firm/provider.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Applicable Resources (Personnel Qualifications)</td>
<td>20</td>
<td>_____</td>
</tr>
<tr>
<td>Evaluate the extent of applicable resources available to the provider to execute the contract:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Adequacy of proposed number of staff for the district’s needs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Consider experience of person(s) assigned to service the district’s contract.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Consider the qualifications of the staff proposed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Approach and Understanding of Scope</td>
<td>30</td>
<td>_____</td>
</tr>
<tr>
<td>Evaluate the provider’s approach to and understanding of the scope of services required in the RFP as evidenced by the vendor’s proposal:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Detailed approach is reasonable /responsive to District’s needs.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Familiarity with project locations as evidenced by proposal.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Identify/recognize critical or unique issues specific to the project.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Unique approaches that have been successful elsewhere.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Cost</td>
<td>20</td>
<td>_____</td>
</tr>
<tr>
<td>Determination of cost and pricing data:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Consider the amount of time estimated for staff and the fees associated with it.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Consider whether all elements of pricing conform to the requirements of the RFP.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Ranked By: ________________________**

**TOTAL POINTS**

(100)
PROPOSAL PAGE

Respondent must complete the following section in its entirety and sign and date where indicated. This agreement shall take effect upon the approval of the District.

The undersigned respondent hereby proposes to furnish all transportation, equipment, supplies, materials and perform all necessary labor to complete all work stipulated in, required by, and in conformity with the proposed agreement documents and specifications attached hereto and other documents referred to therein for and in consideration of prices as follows:

A. **Acceptance of proposal by District**: The District shall have a minimum of ninety (90) calendar days from the date of the proposal opening to accept respondent’s offer.

B. **Response time/delivery**: As specified in requirements

C. **District standard payment terms are Net 30 after receipt of invoice.**
   Please state any discounts offered: ________________________________

D. **Submittals**: The following must be submitted with proposal
   1. **Forms 1 - 6**
   2. **Completed W9 and E-Verification Affidavit**
   3. **Certificate of Insurance**
   4. **References and Experience**
   5. **Personnel Qualifications**
   6. **Return all parts of this complete document (respondents to keep copy of proposal submitted)**

E. Please list the name of your company and street address:

   **Applied Economics LLC**
   Company Name

   **11209 N. Tatum Blvd., Suite 225**
   Address

   **Phoenix, AZ 85028**
   City, State, Zip Code
COOPERATIVE PROCUREMENT WITH OTHER JURISDICTIONS:

1) This section is optional; it will not affect the agreement. If the District awarded you the proposed agreement, would you sell under the prices and terms of this agreement to any public school district or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the greater Kansas City metropolitan trade area? (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this agreement).

   YES_____ NO_____ SIGNATURE: __________________________________________

2) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.

3) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the proposal or agreement unless they are specifically named in the Request or Proposals as a joint respondent.

4) All sales to other jurisdictions will be made on purchase orders issued by that jurisdiction. All receiving, inspection, payments and other agreement administration will be the responsibility of the ordering jurisdiction.

5) Each jurisdiction that is a party to the joint proposal has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.
FORM NO. 1: CONSULTANT PROFILE

1. Lead Consultant Firm(s) (or Joint Venture) Name and Address:

1a. Firm / Provider is: __ National  X Regional  __ Local

1b. Year Firm / Provider Established: 1995

Years of Experience providing Demography Study Services? 24

1c. Licensed to do business in the State of Missouri:  X Yes  __ No

1d. Name, title, telephone number and email address of Principal to contact:

Rick Brammer, Principal  602-765-2400  rbrammer@aeconomics.com

1e. Address of office to perform work, if different from Item No. 1:

2. Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District’s project:

Principal Planner  Senior Associate
GIS Technician

3. If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative and technical) for each firm:

3a. Has this Joint Venture previously worked together?  X Yes  __ No

Bidder’s Initials  RB
FORM NO. 2: KEY OUTSIDE CONSULANTS

Each respondent must complete this form for all proposed sub-contractors.

SUBCONTRACTOR #1
Name & Address: Landmarketing LLC / MarketGraphics
14904 South Rosehill Road
Olathe, KS

Specialty/Role with this Project: Local real estate data and market information

Worked with Lead Firm Before: Yes Yes or No

Year Firm Established: 1999

Years of Experience providing Demographer Services? 10

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.

GuideK12

SUBCONTRACTOR #2
Name & Address: 12301 Whitewater Drive, Suite 10
Minnetonka, MN 55343

Specialty/Role with this Project: Student Search on-line student information

GuideK12 - Geovisal Analytics for Education

Worked with Lead Firm Before: No Yes or No

Year Firm Established: 2012

Years of Experience providing Demographer Services? 7

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.

Bidder’s Initials RB
FORM NO. 3: EXPERIENCE/REFERENCES

Work by Firm/Provider (including any subcontractors or Joint-Venture companies) that best illustrate current qualifications relevant to the districts project that has been/is being accomplished by personnel during the past five (5) years that shall be assigned to the District’s project. List no more than ten (10) total projects:

Client Name & Address:

Dates of Service:

Client Contact Person, Title & Telephone Number:

Estimated Cost for Entire Contract: $

Scope of Entire Contract: (Please give quantitative indications wherever possible).

Nature of Firm's/Provider’s responsibilities in contract: (Please give quantitative indications wherever possible).

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District's project:
FORM NO. 4: RESUME OF KEY PERSONNEL

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District’s Demography Study project:

a. Name and Title:

b. Assignment:

c. Name of Firm with which associated:

d. Years of Experience:
   With this firm_____ other firms_____

e. Education: Degree(s) or Certification(s)/Year/Specialization:

f. Current Registration(s):

g. Other Experience & Qualifications relevant to the proposed project:
FORM NO. 5: PROJECT NARRATIVE

Use this space to provide a detailed project approach including but not limited to:

- Schedule and detailed approach is reasonable/responsive to District’s needs
- Describe Services offered
- Identify any and all proven techniques used
- Roles of all involved parties clearly identified
- Familiarity with project location as evidenced by proposal/interview (if applicable)
- Identify/recognize critical or unique issues specific to the project and unique approaches used elsewhere
- Proposed timeline for implementation of contract
- Proposed communication process

The foregoing is a statement of facts.

Signature:

Typed Name and Title: Rick Brammer, Principal
Telephone Number: 602-765-2400 x103
Date: 7/1/2019
FORM NO. 6: PRICING: Demography Study Services
Based on all items included in Specifications

<table>
<thead>
<tr>
<th>DESCRIPTION OF SERVICE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Demographic Update</td>
<td>$ 14,500</td>
</tr>
<tr>
<td>Option 1: GuideK12 Suite</td>
<td>$ 31,180*</td>
</tr>
<tr>
<td>Option 2: SchoolSearch Module Only</td>
<td>$ 5,000</td>
</tr>
</tbody>
</table>

**GRAND TOTAL**: $ varies

* Based on $4,700 setup fee, and $1.40 per student annually (estimated for 18,200 students).

Respondent must complete the following section in its entirety and sign and date where indicated. This agreement shall take effect upon the approval of the District.

The undersigned respondent hereby proposes to furnish all transportation, equipment, supplies, materials and perform all necessary labor to complete all work stipulated in, required by, and in conformity with the proposed agreement documents and specifications attached hereto and other documents referred to therein for and in consideration of prices as follows:

A. **Acceptance of proposal by District**: The District shall have maximum ninety (90) calendar days from the date of the proposal opening to accept respondent’s offer.

B. **Response time/delivery**: As specified in requirements

C. **District standard payment terms are Net 30 after receipt of invoice. Payment terms are negotiable. Please state any discounts offered:**

D. **Submittals**: The following must be submitted with proposal
   1. **References and experience**
   2. **Personnel Qualifications**
   3. **Certificate of Insurance**
   4. Return all parts of this complete document (respondents to keep copy of proposal submitted)

Signature:

Typed Name and Title: Rick Brammer, Principal
Telephone Number: 602-765-2400 x103
Date: 7/1/2019

Bidder's Initials **RB**
GENERAL TERMS AND CONDITIONS

GENERAL INSTRUCTIONS CONCERNING RFP/RFQ/BIDS

1. **AWARD.** The right is reserved, as the interest of the District may require rejecting any or all proposals and to waive any minor informality or irregularity in proposals received. The District may accept any item or group of items of any proposal unless qualified by specific limitation of the respondent. UNLESS OTHERWISE PROVIDED IN THE SCHEDULE, PROPOSALS MAY BE SUBMITTED FOR ANY QUANTITIES LESS THAN THOSE SPECIFIED; AND THE DISTRICT RESERVES THE RIGHT TO MAKE AN AWARD ON ANY ITEM FOR A QUANTITY LESS THAN THE QUANTITY PROPOSAL UPON AT THE UNIT PRICE OFFERED UNLESS THE RESPONDENT SPECIFIED OTHERWISE IN HIS PROPOSAL. The agreement shall be awarded to that responsible and responsive person(s) whose proposal, conforming to the Request for Proposals, will be most advantageous (lowest price and best value) to the District, price and other factors considered. An award mailed (or otherwise furnished) to the successful respondent within the time for acceptance specified in the proposal, results in a binding agreement without further action by either party.

2. **PREPARATION OF PROPOSALS.**
   A Respondents are expected to examine the drawing, specifications, schedule and all instructions. Failure to do so will be at the respondent's risk.
   B Each respondent shall furnish the information required by the Request for Proposals (RFP). The respondent shall sign the RFP and print or type his/her name on each sheet thereof on which he/she makes an entry. Erasures or other changes must be initialed by the person signing the offer. Proposals signed by an agent are to be accompanied by evidence of his/her authority unless such evidence has been previously furnished to the District.
   C Unit price for each unit shall be shown and such price shall include packing unless otherwise specified. A total shall be entered in the total column for each item. In case of discrepancy between a unit price and extended price, the unit price will be presumed to be correct.
   D Alternate proposals for supplies or services other than those specified will not be considered unless authorized by the RFP.
   E Respondent must state a definite time for delivery of supplies or services unless otherwise specified in the RFP.
   F Time, if stated as a number of days, will include Saturdays, Sundays, and holidays.
   G If the item has a trade name, brand and/or catalog number, such must be stated in the proposal.
   H In submitting proposals, the vendor agrees that the District shall have 90 days in which to accept or reject any of the prices submitted unless otherwise specified on the proposal page.
   I Specification sheets MUST be returned with submittal.

3. **EXPLANATION TO RESPONDENTS.** Any explanation desired by a respondent regarding the meaning or interpretation of the RFP, terms or specifications, etc., must be requested in writing and with sufficient time allowed for a reply to reach respondents before the submission of their proposal. Verbal explanation or instruction given before the award of the agreement will not be binding. Any information given to a prospective respondent concerning a RFP will be furnished to all prospective respondents as an addendum to the RFP, if such information is necessary to respondents in submitting proposals on the RFP or if the lack of such information would be prejudicial to uninformed respondents.

4. **ACKNOWLEDGMENT OF ADDENDUM TO REQUEST FOR PROPOSALS.** Receipt of an addendum to a RFP by a respondent must be acknowledged (a) by signing and returning the addendum. Such acknowledgment must be received prior to the hour and date specified for receipt of proposals, or returned with the packet and received prior to closing time and date.

5. **SUBMISSION OF PROPOSALS.**
   A Proposals and modification thereof shall be uploaded to www.publicpurchase.com.
B. Emailed or faxed proposals will not be considered.
C. Samples of items, when required, must be submitted within the time specified and unless otherwise specified by the District, at no expense to the District. If not consumed by testing, samples will be returned at respondents' request and expense, unless otherwise specified by the RFP.
D. Proposals will not be publicly opened as stipulated in the "Request for Proposals".
E. Submission of a proposal constitutes an assignment by you of any and all anti-trust claims that you may have under the federal and/or state laws resulting from this agreement.

6. **FAILURE TO SUBMIT PROPOSAL.** If no proposal submitted, do not return the RFP unless otherwise specified. A letter or postcard should be sent to the Purchasing and Distribution Service office advising whether future invitations for the type of supplies or services covered by this RFP are desired. Failure of the recipient to propose or to notify Purchasing and Distribution office that future invitations are desired may result in removal of the name of such recipient from the mailing list for the type of supplies or services covered by the invitation.

7. **WITHDRAWAL OF PROPOSALS.** Proposals may be withdrawn, by written notice prior to the exact hour and date specified for receipt of proposals. A proposal also may be withdrawn in person by a respondent or his/her authorized representative provided his/her identity is made known and he/she signs a receipt for the submittal, but only if the withdrawal is made prior to the exact hour and date set for receipt of proposals. Telephone requests to withdraw a proposal will be considered only if confirmed by letter or faxed letter.

8. **LATE PROPOSALS.** Proposals will NOT be accepted after the date and time of closing under any circumstances.

9. **DISCOUNTS AND PROPOSAL EVALUATION.** Discounts offered for prompt payment may be considered in proposal evaluation. Example, if the District were to make a bulk purchase of items for a special event.

10. **MATERIAL AVAILABILITY.** Respondents must accept responsibility for verification of material availability, production schedules and other pertinent data prior to submission of proposal and delivery time. It is the responsibility of the respondent to notify the District immediately if materials specified are discontinued, replaced, or not available for an extended period of time.

11. **AWARD OF AGREEMENT.**
   A. **BASIS OF AWARD.**
      (1) Only qualified proposals will be considered.
      (2) Respondents may be requested to submit financial statements subsequent to the opening. Such statements shall be submitted to District within three (3) days after being so requested.
      (3) The award of the agreement, if it is awarded, will be to the lowest responsible and responsive respondent whose qualifications indicate the award will be in the best interest of the District and whose proposal complies with all prescribed requirements.
      (4) The District reserves the right to reject any and all proposals, and waive any and all informalities, and the right to disregard all non-conforming or conditional prices or counter-proposals.
   
   B. **EVALUATION OF PROPOSALS.**
      (1) The evaluation of proposals will include consideration of prior experience, financial statements, if requested, sub-contractors, suppliers, and manufacturers to be used in the work and manufacturers' data on the materials and equipment to be incorporated, quality of vending machines, and ability to provide a wide variety of quality products.
      (2) Whenever the name of a manufacturer is mentioned on the face hereof and the words "or equal" do not follow, it shall be deemed that the words "or equal" shall follow such designations unless the face hereof specifies "no substitutes". The District may assume that items are equal or it may request samples and proof thereof unless approved before shipment. The District reserves the right to return at
C. **NOTICE OF AWARD.** After considering the basis of award and evaluation of proposals, the District will within ninety (90) days after the date of opening proposals, notify the successful respondent of acceptance of his/her proposal.

12. **QUALIFICATIONS OF RESPONDENTS.** The District may make such investigations as are deemed necessary to determine the ability of the respondent to perform the work and the respondent shall furnish all such information and date for this purpose as the District may request. The District reserves the right to reject any proposal if the evidence submitted by, or investigation of such respondent fails to satisfy the district that such respondent is properly qualified to carry out the obligations of the agreement and to complete the work contemplated therein.

13. **ANTI-TRUST.** Submission of a proposal constitutes an assignment by you of any and all anti-trust claims that you may have under the federal and/or state laws resulting from this agreement.

14. **GUARANTEE.** All customary guarantees for workmanship, quality and performance specific by the manufacturer for any or all items shall apply to the items offered under this proposal.

15. **EXPERIENCE STATEMENT** (if required). Only those proposals will be considered which are submitted by respondents who submit with their proposal an experience statement listing satisfactory service of existing vending agreements. A list of comparable projects, including pertinent information and identification of the districts or local governments, shall be submitted with the proposal. Similar experience statements shall be included for any subcontractors named in the proposal.

**GENERAL CONTRACT REQUIREMENTS.**

1. **DEFINITIONS.**
   A "District" shall refer to:
   Lee’s Summit R-7 School District, 301 NE Tudor Road, Lee’s Summit, MO, 64086-5702.
   B "Selected respondent" shall refer to the corporation, company, partnership, firm, or individual, named and designated in the agreement and who has entered into this agreement for the performance of the work covered thereby, and its, his or their duly authorized agents or other legal representatives.
   C The "specifications" includes Instruction to Respondents, the Terms and Conditions of Purchase, the Definitions and the technical specifications of the work.
   D A "sub-contractor" is a person, firm or corporation supplying labor or materials, or only labor for work at the site of the project for, and under separate agreement or agreement with the contractor.
   E The term "sample" as used herein includes natural materials, fabricated items, equipment, devices, appliances or parts thereof as called for in the specifications and any other samples as may be required by the district to determine whether the kind, quality, construction, workmanship, finish, color and other characteristics of the materials, etc., proposed by the vendor conform to the requirements of the agreement documents.
   Samples approved by the District shall establish the kind, quality, and other required characteristics, and all work shall be in accordance with the approved samples. Samples, when requested, shall be supplied at no cost to the District.
   F The term "estimated" represents quantities estimated for the period of time stated.
   G The term "minimum" means the District will order this quantity of supplies during the period of this agreement at the price bid.

3. **AGREEMENT TERMS.** The performance of this agreement shall be governed solely by the terms and conditions as set forth in this agreement and any specifications or documents notwithstanding any language contained on any invoice, shipping order, bill of lading or other document furnished the Seller at any time and the acceptance by the District of any terms or conditions contained in such document which is inconsistent with the terms and conditions set forth in the agreement.
4. **TRANSPORTATION CHARGES.** When terms of delivery or conditions of this order are F.O.B. destination, all transportation charges shall be paid by the selected respondent.

5. **PACKAGING.** The District will not be liable for any charges for delivery, packing, cartage, boxing, crating or storage in excess of the purchase price of this order unless stated otherwise herein.

6. **INSPECTION AND ACCEPTANCE.** No material received by the District under the terms and conditions of this document shall be deemed accepted until the District has had reasonable opportunity to inspect said material. All material which is discovered to be defective or which does not conform to any warranty of the selected respondent or herein, upon initial inspection, or at any later time if the defects contained in the material were not reasonably ascertainable upon the initial inspection, may be returned at the selected respondent’s expense for full credit or replacement.

7. **GENERAL GUARANTY AND WARRANTY.** The selected respondent warrants that all materials, fixtures, and equipment furnished by the selected respondent’s and his/her sub-contractors shall be new, of good quality, and of good title, and that the work will be done in a neat and workmanlike manner. The selected respondent also guarantees the workmanship and materials for a period of one year from the date of final acceptance of all the work required by the agreement. Furthermore, he/her shall furnish the District with all manufacturers' and suppliers' written guarantees and warranties covering materials and equipment furnished under the agreement.

8. **PATENTS.** The selected respondent warrants that the articles described herein and the sale or use of them will not infringe upon any U.S. or foreign patent and selected respondent covenants that he will at his own expense, defend every suit which may be brought against the District, or those selling or using district’s product (provided selected respondent is promptly notified of such suit and all papers therein are delivered to selected respondent) for any alleged infringement of any patent by reason of the sale or use of such articles and selected respondent agrees that he will pay all cost, damages and profits recoverable in any such suit.

9. **QUANTITIES.** The District assumes no obligation for products or materials shipped in excess of the quantity ordered hereunder. Any unauthorized quantity is subject to District’s rejection and return at selected respondent’s expense.

10. **ACTS OF GOD.** Neither party shall be liable for delays, or defaults in the performance of this agreement due to acts of God or the public enemy, riots, strikes, fires, explosions, accidents, governmental action of any kind or any other causes of a similar character beyond its control and without its fault or negligence.

11. **BANKRUPTCY OR INSOLVENCY.** In the event of any proceedings by or against either party, voluntary or involuntary, in bankruptcy or insolvency, or for the appointment of a receiver or trustee or an assignee for the benefit of creditors, of the property of selected respondent, or in the event of breach of any of the terms hereof including the warranties of the selected respondent, the District may cancel this agreement or affirm the agreement and hold selected respondent responsible in damages.

12. **COMPLIANCE WITH APPLICABLE LAWS.** The vendor shall comply with all federal, state or local laws, ordinances, rules, regulations and administrative orders, including but not limited to Wage, Labor, Unauthorized Aliens, EEO and OSHA-type requirements which are applicable to the vendor’s performance under this agreement. Vendor shall indemnify and hold the District harmless on account of any violations thereof relating to Vendor’s performance under this agreement, including imposition of fines and penalties which result from the violation of such laws.

13. **LAW GOVERNING.** All agreements shall be subject to, governed by, and construed according to the laws of the State of Missouri. Any dispute regarding this agreement will be decided by a Missouri Court.

14. **TIME OF DELIVERY.** The District requires that all materials ordered will be delivered when specified. Time is therefore of the essence of this purchase order. If deliveries are not made at the time agreed upon,
the District reserves the right to cancel or to purchase elsewhere and hold vendor accountable for any damages sustained as a result thereof.

15. **INTERPRETATION OF AGREEMENT AND ASSIGNMENTS.** This agreement shall be construed according to the laws of the State of Missouri. This agreement, or any rights, obligations, or duties hereunder may not be assigned by the selected respondent without the District’s written consent and any attempted assignment without such consent shall be void.

16. **SELECTED RESPONDENT’S INVOICES.** Invoices shall be prepared and submitted in duplicate unless otherwise specified. Invoices shall contain the following information: agreement number (if any), purchase order number, item number; agreement description of supplies or services, sizes, quantities, unit prices and extended totals. Invoices for and inquiries regarding payment should be addressed to the Lee’s Summit R-7 School District’s Business Services Department. Any delay in receiving invoices, or errors and omissions, on statement or invoices will be considered just cause for withholding settlement without losing discount privileges.

17. **NOTICE AND SERVICE THEREOF.** Any notice to any vendor from the District relative to any part of this agreement will be in writing and considered delivered and the service thereof completed when said notice is posted, by certified or regular mail, to the said selected respondent at his/her last given address or delivered in person to said selected respondent or his/her authorized representative on the work or service.

18. **PROVISIONS REQUIRED BY LAW DEEMED INSERTED.** Each and every provision of law and clause required by law to be inserted in this agreement will be deemed to be inserted herein and the agreement will be read and enforced as though it were included herein, and if through mistake or otherwise any such provision is not inserted, or is not correctly inserted, then upon the application of either party the agreement will forthwith be physically amended to make such insertion or correction.

19. **TERMINATION OF AGREEMENT.** This agreement may be terminated by either party upon thirty (30) days prior notice in writing to the other party. The District may terminate this agreement immediately, under breach of agreement, if the selected respondent fails to perform in accordance with the terms and conditions. In the event of any termination of agreement by the selected respondent, the District may purchase such supplies and/or services similar to those so terminated, and for the duration of the agreement period the selected respondent will be liable for all costs in excess of the established agreement pricing.

20. **INDEMNITY AND HOLD HARMLESS.** The selected respondent agrees to indemnify, release, defend, and forever hold harmless the District, its officers, agents, employees, and elected officials, each in their official and individual capacities, from and against all claims, demands, damages, loss or liabilities, including costs, expenses, and attorneys fees incurred in the defense of such claims, demands, damages, losses or liabilities, or incurred in the establishment of the right to indemnity hereunder, caused in whole or in part by the selected respondent, his/her sub-contractors, employees or agents, and arising out of services performed by the selected respondent, his/her subcontractors, employees or agents under this agreement to the extent permitted by the Constitution and the Laws of the State of Missouri.

21. **SUB-AGREEMENTS.**
   
   A. The selected respondent shall not execute an agreement with any sub-contractor to perform any work until he/she has written the District to determine any disapproval of the use of such sub-contractor.

   B. The selected respondent shall be fully responsible to the District for the acts and omissions of his/her sub-contractors, and of persons either directly or indirectly employed by them, as he/she is for the acts and omissions of persons directly employed by him/her.

   C. The selected respondent shall cause appropriate provisions to be inserted in all sub-contracts relative to the work to require compliance by each sub-contractor with the applicable provisions of the agreement.
D. Nothing contained in the conditions shall create any contractual relationship between any sub-contractor and the District.

22. **UNIFORM COMMERCIAL CODE.** This agreement is subject to the Uniform Commercial Code and shall be deemed to contain all the provisions required by said Code that apply to said agreement.

23. **CHANGES.** The District may at any time, by written order, without notice to any surety, make changes or additions, within the general scope of this agreement in specifications, instructions for work, methods of shipment or packing or place of delivery. If any such change causes an increase or decrease in the cost of or in the time required for performance of this agreement, the selected respondent shall notify the District in writing immediately and an appropriate equitable adjustment will be made in the price or time of performance, or both, by written modification of the agreement. Any claim by the selected respondent for such adjustment must be asserted within thirty (30) days or such other period as may be agreed upon in writing by the parties after the selected respondent’s receipt of notice of the change. Nothing herein contained shall excuse the vendor from proceeding with the agreement as changed.

24. **RESPONSIBILITY FOR SUPPLIES.** The selected respondent shall be responsible for supplies until they are delivered and accepted at the designated delivery point; and the selected respondent shall bear all risks for rejected supplies after notice of rejection.

25. **EXECUTION OF AGREEMENT.** The agreement shall consist of a YEARLY AGREEMENT and a copy of the selected respondent’s signed proposal attached and that the same, in all particulars, becomes the agreement and agreement between the parties hereto. That both parties thereby accept and agree to the terms and conditions of said proposal documents, and that the parties are bound thereby and the compensation to be paid the selected respondent is as set forth in the selected respondent's RFP. Items not awarded, if any, have been deleted.

26. **NON-DISCRIMINATION IN EMPLOYMENT.** In connection with the furnishing of supplies or performance of work under this agreement, the selected respondent agrees to comply with the Fair Labor Standard Act, Fair Employment Practices, Equal Opportunity Employment Act, and all other applicable federal and state laws, and further agrees to insert the foregoing provision in all subcontracts awarded hereunder.

27. **TAX EXEMPT.** Do not bill tax on bulk purchases for special events. The District is exempt from payment of the Missouri Sales Tax in accordance with Section 39 (10), Article 3, of the Missouri Constitution and is exempt from payment of Federal Excise Taxes in accordance with Title 26, United States Code annotated.

28. **ASSIGNMENTS.** Neither the District nor the selected respondent shall, without the prior written consent of the other, assign in whole or in part his interest under any of the agreement documents and, specifically the contractor shall not assign any moneys due or to become due without the prior written consent of the District.

29. **INSURANCE:** The consultant shall be required to maintain and carry in force, for the duration of the contract, insurance coverage of the types and minimum liability as set forth below:

   a. **PROFESSIONAL LIABILITY**
      
      Chemical Misapplication $2,000,000

   b. **COMMERCIAL GENERAL LIABILITY**
      
      Limits:
      
      Each Occurrence: $1,000,000

Bidder's Initials RB
Personal & Advertising Injury: $1,000,000
Products/Completed Operations Aggregate: $1,000,000
General Aggregate: $2,000,000

Policy must include the following conditions:

- Contractual Liability
- Products/Completed Operations
- Personal/Advertising Injury
- Independent Contractors
- Additional Insured: Lee's Summit R-7 School District

c. **AUTOMOBILE LIABILITY**

Policy shall protect the consultant against claims for bodily injury and/or property damage arising out of the ownership or use of any owned, hired and/or non-owned vehicle and must include protection for either:

1. All owned autos; hired autos; and non-owned autos

Limits of auto liability insurance shall be the same as required in the Commercial General Liability section with the exception of the District being named as additional insured.

d. **WORKERS' COMPENSATION**

This insurance shall protect the consultant against all claims under applicable State Workers' Compensation Laws. The consultant shall also be protected against claims for injury, disease or death of employees which, for any reason, may not fall within the provisions of a Workers' Compensation Law. The policy limits shall not be less than the following:

Workers' Compensation: Statutory

Employer's Liability:

- Bodily Injury by Accident: $100,000 Each Accident
- Bodily Injury by Disease: $500,000 Policy Limit
- Bodily Injury by Disease: $100,000 Each Employee

Before, entering into contract, the successful respondent shall furnish to the District Purchasing Office a Certificate of Insurance verifying all of the foregoing coverage’s and identifying the District as an "additional insured" on both the general liability and automobile policies. This inclusion shall not make the District a partner or joint venture with the contract consultant in its operations hereunder.

Prior to any material change or cancellation, the District will be given thirty (30) days advance notice by registered mail to the stated address of the certificate holder.

In the event of an occurrence, it is further agreed that any insurance maintained by the District, shall apply in excess of and not contribute with insurance provided by policies named in this contract. The certificate holder on the Certificate of Insurance shall be as follows:

Lee’s Summit R-VII School District
Purchasing and Distribution Services Department
702 SE M-291 Highway
District does not need to be named as additional insured on any Auto Liability Insurance requirements.

30. **INVOICING AND PAYMENTS:**

   Invoices shall be prepared and submitted in duplicate to the appropriate issuing agency. Invoices shall contain the following information: contract number, item number, description of goods and/or services, unit prices, and extended totals.

W-9 FORM

**Name:** Applied Economics LLC

**Address:**
11209 N. Tatum Blvd., Suite 225
Phoenix, AZ 85028

**Social Security Number:**

**Employer Identification Number:**

46-4831002

**Date:** 7/1/2019

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 if you are a U.S. person including a resident alien, to provide your correct TIN to the person requesting it (the requester) and, when applicable:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee.

**Note:** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definitions of a U.S. person:** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien.
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States.
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships:** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.
E-VERIFICATION AFFIDAVIT

Lee’s Summit R-VII School District
301 NE Tudor Road
Lee’s Summit, Missouri 64063
(816) 986-1000 FAX (816) 986-1168
Business Services

As a condition for any service provided to the Lee’s Summit R-VII School District, a business entity shall, by sworn affidavit and provision of documentation, affirm its enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services.

Every such business entity shall complete the following affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contract services. [RSMO 285.530 (2)]. The completed affidavit must be returned as part of the contract documentation or mailed to Lee’s Summit R-VII School District, Attn: Accounts Payable, 301 NE Tudor Road, Lee’s Summit, Missouri 64063.

This affidavit affirms that Applied Economics (Company Name) is enrolled in, and is currently participating in, E-Verify or any other equivalent electronic verification of work authorization operated by the United States Department of Homeland Security under the Immigration Reform and Control Act of 1986 (IRCA); and Applied Economics (Company Name) does not knowingly employ any person who is unauthorized alien in conjunction with the contracted services.

Rick Brammer
Name (Please Print) of registered agent, legal representative or corporate officer

Principal
Title

Signature of registered agent, legal representative or corporate officer

Subscribed and sworn to before me this ____________ of ____________, I am commissioned as a notary public within the County of ____________, State of ____________, and my commission expires on ____________,

(NAME OF COUNTY) (NAME OF STATE) (DATE)

Signature of Notary Date

Failure to respond will cause payments due to you to be held until affidavit is received. Once the affidavit is received, payments will be released.

Bidder’s Initials RB
GUIDEK12 INFORMATION

GuideK12, geovisual analytics is pleased to submit this response to your solicitation. As the leading provider of geo-visual analytic software in the K-12 education market, GuideK12 helps district administrators make more effective and efficient decisions on topics such as: boundary planning, scenario planning, analyzing demographics/socio-economics, open enrollment trending, resource placement, equity issues, referendum support as well as providing a school search tool for the community. We make it easy to visualize all students on a map, with all characteristics embedded for easy filtering and analysis and informed answers. **We coordinate and combine perfectly with demographic data you may have from outside demographers providing projections and details. Their shape files can be loaded into GuideK12 to run scenarios and do analysis by the district personnel as well as working with the consultant, depending on your arrangement.**

The GuideK12 geovisual analytics suite, is cloud based and consists of four modules that will meet the needs of the district. These include:

**Explorer:** Empower district administrative personnel with the right information to answer questions quickly. Designed with the individual in mind, Explorer allows users to pinpoint a single person geocoded to the rooftop or zoom out to examine trends across the district. Different data streams can be selected for analyzing different needs (voter data, property owner, etc.). Users will find Explorer their “go-to” module to analyze a wide array of issues when seeking answers to complex problems. So whether it is a Superintendent or front office personnel, Explorer can be their source for data analysis.

**Adviser:** Charts, graphs and thematic maps, have never been faster or easier to create. Just click and select desired characteristics to analyze. No formulas, no requesting and waiting, just analyze in a few clicks, no programming or excel skills needed. Adviser works as a stand-alone module, but is also linked to coordinate with Planner for easy analysis of scenarios and data visualization. Longitudinal data is easy to analyze with Adviser, analyze monthly trends or yearly trends.

**Planner:** This module provides district all the tools needed for boundary changes, adding buildings, consolidating buildings, reconfiguring class sizes, or class structures. Easily create “what if” scenarios and obtain instant results with a complete set of reports and output options. Every scenario can be easily retrieved to share with board members, administration, community members or other stakeholders. Our software’s reliable, iterative process makes input and feedback easy to incorporate, increasing community dialogue, trust and support.

**SchoolSearch:** Parents, realtors and other community members have a few simple questions: Is this house/lot/apartment in the district? What elementary/middle/high school would I attend?” GuideK12 SchoolSearch reduces calls to the front office and parent frustration by making it easy to look up the assigned schools. Completely flexible and customizable SchoolSearch serves as a district marketing and communications tool allowing districts to highlight magnet schools and other program offerings per building.
Designed to make data accessible, actionable and easy for administrators

No more requests or waiting for hard to decipher reports

Simply filter, click and get answers

GuideK12™
Geovisual Analytics for Education

www.guidek12.com
GuideK12™ makes decisions more comprehensive for:
- Demographic Analysis
- Programmatic Need Analysis
- Boundary Analysis
- Opening & Closing facilities
- Referendum Planning
- Chronic Absenteeism
- Equity Issues
- Transfer Status mapping

GuideK12™ Suite: Four modules to meet your different analysis needs

**Explorer**
The daily analysis module for everything in your district.

**Adviser**
An interactive, comprehensive charting and graphing tool with simple drop downs for instant answers.

**Planner**
Scenario planning in minutes. Instantly see the impact of important decisions.

**School Search**
24/7 customizable address look up tool for your community.

We take data accuracy to a new level of precision
GuideK12 uses a proprietary system to map every student to their roof top for confidence in planning. Every student is clearly visible.

"We were data driven from start to finish with GuideK12 and could immediately see the numbers on the screen of each decision. Data needs to tell the story and drive the decisions and it absolutely did."

**Tom Voig, Information Systems Coordinator**
- District 196

"By standardizing the data flow into a GuideK12 environment, it allows more people to ask qualitative and quantitative questions without the intervention of the IT staff time or data specialists. It’s a democratization of information."

**Kirk Langer, CTO**
- Lincoln Public Schools

GuideK12 Geovisual Analytics for Education

www.guidek12.com
Explorer: Analyze any aspect of the district down to the student level, any data set can be filtered and mapped.
Planner: Allows for creating scenarios to move students by selecting areas, filtering characteristics and fine tuning.
Adviser allows any data to be easily filtered for charting and graphing in visually appealing ways.

The graph shows the count of students by school type and whether they receive special education services. The data is grouped by Elementary School, Middle School, High School, and Other Schools. The chart indicates the number of students who do not receive special education and those who do, with the total count for each category displayed.
School Search: Customized to showcase whatever programs, details by building the district wants to feature
FORM NO. 6: PRICING: Demography Study Services

Provide pricing of all items included in Specifications, plus any other value added services that have been included in your proposal. Please indicate if items are monthly or annual. All items proposed must be listed on this table for evaluation by committee. Please add lines as needed.

<table>
<thead>
<tr>
<th>DESCRIPTION OF SERVICE</th>
<th>PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Demography Services offered per RFP proposal, including report detailing projection of student numbers (per Section 3.0 of the RFP). SEE NOTE #1</td>
<td>$14,530</td>
</tr>
<tr>
<td>Annual Governing Board Presentation. SEE NOTE #2</td>
<td>$1,000</td>
</tr>
<tr>
<td>OPTIONAL: Facility and Boundary Planning Assistance. SEE NOTE #3</td>
<td>$TBD</td>
</tr>
<tr>
<td>OPTIONAL: GuideK12 Software. SEE NOTE #4</td>
<td>$TBD</td>
</tr>
<tr>
<td>Please see attached pages for notes.</td>
<td>$</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>$15,530</td>
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</table>

Respondent must complete the following section in its entirety, sign and date where indicated. This agreement shall take effect upon the approval of the District.

The undersigned respondent hereby proposes to furnish all transportation, equipment, supplies, materials and perform all necessary labor to complete all work stipulated in, required by, and in conformity with the proposed agreement documents and specifications attached hereto and other documents referred to therein for and in consideration of prices as follows:

Signature: Rick Brammer

Typed Name and Title: Rick T. Brammer, Principal

Telephone Number: (602) 765-2400

Date: August 6, 2019

Form must be returned, via email, to Christa Battaglia, Purchasing Coordinator, by 4:00 pm, Tuesday, August 6, 2019.
**Note #1**

Exhibit A details our annual cost of providing the services specifically requested in Section 3 of the RFP totaling $14,530.

**EXHIBIT "A"**

**ESTIMATED HOURS BY TASK AND STAFF MEMBER AND COST**

**LEE'S SUMMIT R-7 SCHOOL DISTRICT**

**2019/20 DEMOGRAPHIC AND ENROLLMENT UPDATE**

<table>
<thead>
<tr>
<th>Task</th>
<th>Principal</th>
<th>Senior</th>
<th>Associate</th>
<th>Total Hours</th>
<th>Budget Labor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1 - Update Planning Database</td>
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<td>32.0</td>
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<td>1.1 Enrollment &amp; Demographic Data</td>
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<td>2.1 Absorption Rate Analysis</td>
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<td>2.2 Student Survival Analysis</td>
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<td>2.3 Student Generation / Capture Rate Analysis</td>
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<td>4.2 Analysis &amp; Review</td>
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<td></td>
</tr>
<tr>
<td>5.2 Presentation</td>
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<tr>
<td><strong>Project Total Hours</strong></td>
<td>28.0</td>
<td>82.0</td>
<td>32.0</td>
<td>142.0</td>
<td></td>
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</tbody>
</table>

**Hourly Rates**

- Principal: $125.00
- Senior: $95.00
- Associate: $70.00

**Labor Cost**

- Principal: $3,500
- Senior: $7,790
- Associate: $2,240
- Total: $13,530

**Expenses:**
- Residential Absorption Data - LandMarketing: $1,000

**Total Cost**

- $14,530.00

**Note #2**

We feel that an annual presentation of the demographic study to the Governing Board would be beneficial. This would add $1,000 to the annual cost of the study based on 8 hours of Principal time to create and present the presentation. Time of the presentation to be arranged following delivery of the report in mid- to late-October.
**Note #3**

The cost of future boundary studies and other planning activities (proposal Task 6) cannot be determined without a specific scope of work, and none was provided in Section 3 of the RFP. **We tailor our services in these areas to the specific needs of each client AND circumstance and therefore we cannot provide unit-based pricing for such services. The hourly rates shown in Exhibit “A” will prevail for all such work.** The level of effort can range from performing simple “what-if” scenarios for internal use, to full blown public participation processes such as the one that occurred last year with costs ranging from $500 to $5,000. We are happy to participate in all aspects of such efforts, and will provide a cost estimate for any specific need that arises before any work is performed. We are acknowledging the advantage of empowering staff to utilize the demographic information themselves for many of these analyses by suggesting the OPTIONAL addition of software purchased directly from GuideK12 that we can load the enrollment data and projections into. See Note #4 for additional pricing information on GuideK12.

**Note #4**

In Task 7 of our proposal we introduced the option of adding one or more components of the GuideK12 software package to the scope of work for the demographic study. The GuideK12 geovisual analytics suite is cloud based and consists of four modules that will meet the needs of the district very well. Role based security allows the district to provide access to an unlimited number of users within the district. Explorer is the first module and it allows for detailed analysis of any data stream and characteristics contained within, including the ability to create reports of selected areas with details or output for communication services. Planner is the second module and is a module designed exclusively for boundary planning and scenario creation. All the logic is tracked for every scenario allowing transparent discussions and analysis. The results of any scenario are instantly able to be examined through the dashboard as well as reports showing all the changes and impacts (demographics, capacity, feeder patterns, etc.) Third, Adviser is a reporting and graphing module that allows for visually appealing reports without the hassle of Excel, just simple drop-down selections. And lastly, SchoolSearch is the easiest to use address tool on the market and mobile friendly. GuideK12 SchoolSearch is completely customizable, allowing you to showcase different programs, offerings, transportation and new boundaries clearly for the public. The District can purchase just the SchoolSearch module for $5,000 per year, or the entire suite for a setup fee of $4,700 plus $1.40 per student per year. **We cannot provide a firm price for this item without knowing what parts of the software suite the District MAY wish to purchase.**