FAYETTE COUNTY PUBLIC SCHOOLS

Executive Summary
Fayette County Public Schools Board Meeting
Agenda Item

MEETING: **Regular** **DATE:** **12/15/2022**

TOPIC: **Award of Bids/Proposals**

PREPARED BY: **Matt Moore, Logistical Services & Purchasing**

Recommended Action on: **12/15/2022**
Action Item for Vote (REGULAR MEETING)

Superintendent Prior Approval: **Yes**

Recommendation/Motion: **Approve the award recommendations for the listed bids, proposals and extensions**

Background/Rationale: **A summary of bids/proposals submitted from the Purchasing Department for approval**

Strategic Priority:
☐ Student Achievement ☐ Diversity, Equity, Inclusion & Belonging
☐ Highly Effective & Culturally Responsive Workforce
☐ Stakeholder Engagement & Outreach ☒ Organizational Health & Efficiency

Data Considerations: NA

Policy: **KRS 45A.365, KRS 45A.370**

Fiscal Impact: Included in attachment

Attachments(s): Award of Bids/Proposals

AWARD OF BIDS/PROPOSALS

The following is a summary of bids/proposals submitted from the Purchasing Department for approval.

BIDS/PROPOSALS

BID	MAILING ROSTER	DEPARTMENT	RESPONSE – NUMBER RECEIVED
1. RFP 68-22 Band and Orchestra Instruments	1. TSMSDC 2. Commerce Lexington 3. SBA 4. NAVOBA 5. KYPTAC 6. ORVWBC 7. 7PM Group 8. Vendor Registry	Logistical Services and Purchasing	6
2. RFP 69-22 School Kitchen Refrigeration Repairs	1. TSMSDC 2. Commerce Lexington 3. SBA 4. NAVOBA 5. KYPTAC 6. ORVWBC 7. 7PM Group 8. Vendor Registry	Child Nutrition Maintenance	3
3. Bid 71-22 Lincoln Electric Welders	1. TSMSDC 2. Commerce Lexington 3. SBA 4. NAVOBA 5. KYPTAC 6. ORVWBC 7. 7PM Group 8. Vendor Registry	Southside Technical Center	4
4. RFP 03-23 Graphic Design, Communication, Marketing and Special Event Support	1. TSMSDC 2. Commerce Lexington 3. SBA 4. NAVOBA 5. KYPTAC 6. ORVWBC 7. 7PM Group 8. Vendor Registry	Office of Public Engagement	10

5. RFP 02-23 Survey Research Services and Platform	1. TSMSDC 2. Commerce Lexington 3. SBA 4. NAVOBA 5. KYPTAC 6. ORVWBC 7. 7PM Group 8. Vendor Registry	Office of Public Engagement	4

CONTRACT EXTENSIONS	VENDOR	DEPARTMENT	YEAR OF CONTRACT RENEWAL
1. RFP 61-19 Office and Classroom Supplies	Guy Brown Hurst Office Suppliers Action Business Suppliers Kerr Workplace Solutions School Specialty ODP Business Solutions	Logistical Services/ Purchasing	3
2. RFP 68-19 Student Pictures	Strawbridge Studios Lifetouch National School Studios Holifield Photography Triple Play Productions	Logistical Services/ Purchasing	3
3. RFP 28-21 Science Equipment/Materials/Supplies Catalog	Carolin Biological Supply Fisher Scientific Company Sargent Welch Ward's Science School Specialty	Logistical Services/Purchasing	1

AWARD OF BIDS/PROPOSALS

1. RFP 58-17 Music Instruments and Supplies Catalog

BACKGROUND AND RATIONALE:

This RFP provides a multiple award catalog contract used to purchase music instruments and supplies for FCPS. Evaluation was based off of a sample price list of popular band and orchestra instruments ordered by schools as well as information about the vendor such as location, number of items available in their catalog, sales representatives and the types of items offered. Award recommendation is for the highest four scores for each type of instrument.. The contract gives the option to renew for an additional year for up to 5 years upon Board approval.

Key to Markings
Recommended Award
KPC – will utilize KPC bid
(Multiple Award)

Band Instruments

	Total	
Hurst Music WBE	756	###
Washington Music Center	537	
Alamo Music Center MBE	669	###
Doo Wop Shop	669	###
Music & Arts	600	###
Don Wilson Music Co WBE	511	KPC

Orchestra Instruments

	Total	
Hurst Music WBE	430	###
Doo Wop Shop	405	###
Music & Arts	760	###
Old Town Violins	725	###

Contract Period: January 1, 2023 and ending December 31, 2023 with option to renew

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Music Instruments / Supplies	Last fiscal year's expenditure was approximately $430,000.00	Schools and departments	Recurring	Immediate impact to provide Music Equipment /supplies for all schools K-12

Funding key: Schools and Departments

STAFF CONTACT: Dan Sawyers, Director of Logistical Services/Purchasing

POLICY REFERENCE: KRS 45A.365

RECOMMENDATION: A motion is in order to:
"Award the contract for one year with Doo Wop Shop, Hurst Music, Alamo Music Center, Music & Arts and Old Town Violins."

2. RFP 69-22 Refrigeration Repair Services for School Kitchens

BACKGROUND AND RATIONALE:
This RFP is used to establish a refrigeration repair contract for the Child Nutrition department to use for repairs in the school kitchens. The RFP is evaluated on hourly rate, experience with the district and district brand equipment and having the appropriate licensed technicians to perform the work. Proposals were evaluated by Child Nutrition staff familiar with the type of work performed under this contract. Glenns Commercial Service was the high score based on experience and lower rates and is recommended for award. The RFP includes the option to renew the contract for additional one-year periods upon Board approval up to a total of five years.

Key to Markings
Recommended Award

	Technical	Cost	Total
Glenns Commercial Service ###	425	450	875
Thermal Service	375	440.5	815.5
DRD Repair VBE	350	387.5	737.5

Contract Period: January 1, 2023 and ending December 31, 2023 with option to renew

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Refrigeration repairs for school kitchens	Last fiscal year's expenditure was approximately $120,000.00	Child Nutrition	Recurring	Will provide repair services for the district for the 2023 year

STAFF CONTACT: Rogie Hale, Child Nutrition Maintenance

POLICY REFERENCE: KRS 45A.370

RECOMMENDATION: A motion is in order to:
"Award the contract to Glenns Commercial Service"

3. Bid Lincoln Electric Welders

BACKGROUND AND RATIONALE:
Southside Technical Center is needing to purchase a Lincoln Electric Welder and Plasm Table. Due to the amount of the purchase a sealed bid was advertised to be awarded to the lowest bid. The bid is recommended to be awarded to the lowest price.

Key to Markings
Recommended Award

1. Lincoln Electric Powerwave 300C Welding Machine with Educational One Pak

	Unit Price	Total Price
Air Gas	$12,233.20	$73,399.20
American Welding & Gas	$11,962.57	$71,775.42
Technology International Inc	No Bid	No Bid
Holston Gases ###	$11,712.69	$70,276.14

2. Lincoln Electric LECS-080-4510-00 and a Lincoln Torchmate 5x10 Plasma Table with 80AMP Power Supply Flex Cutter

	Unit Price	Total Price
Air Gas	$45,893.09	$45,893.09
American Welding & Gas	$45,893.09	$45,893.09
Technology International Inc	$50,700.00	$50,700.00
Holston Gases ###	$45,410.29	$45,410.29

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Lincoln Electric Welder	$115,686.43	0739	Nonrecurring	Immediate impact to provide welding equipment /supplies for Southside students.

Funding Key: 0739

STAFF CONTACT: Daryn Morris, Principal Southside Technical Center

POLICY REFERENCE: KRS 45A.365

RECOMMENDATION: A motion is in order to:
"Award the contract to Holston Gases"

4. RFP 02-23 Graphic Design, Communication, Marketing and Special Event Support -

BACKGROUND AND RATIONALE:

Fayette County Public Schools is soliciting proposals for Graphic Design, Communication, Marketing, and Special Event support to supplement and augment the work of the Office of Public Engagement as needed. The district does not have an in-house graphic designer, and the volume of work to support schools and departments is extensive. In this RFP, we are seeking multiple vendors that offer graphic design, marketing, and communication support with which we could partner on a variety of projects, and proposals from vendors specifically interested in supporting an intensive community campaign on early childhood education. The RFP was evaluated based on experience, qualifications, abilities, implementation strategy, availability to complete work, work samples, cost and references.

Key to Markings
Recommended Award
Multiple Award

Vendor	**Score**
Impressions Marketing and Events WBE	91/100 ###
Bullhorn Creative	87/100 ###
Field Trip	87/100 ###
CESO	70/100 ###
418 Communications	58/100 ###
McBrayer Digital	57/100 ###
Current 360	53/100 ###
Prosper Media Group	52/100 ###
The Logo Warehouse MBE	40/100
Lightbulb Productions WBE	39/100

Contract Period: January 1, 2023 and ending June 30, 2023 with option to renew

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Graphic Design, Communication, Marketing and Special Event Support	Anticipated to be over $30,000 for the fiscal year	Office of Public Engagement	Recurring	Will provide graphic design and marketing services for the district for the 2023 year

STAFF CONTACT: Lisa Deffendall, Office of Public Engagement

POLICY REFERENCE: KRS 45A.370

RECOMMENDATION: A motion is in order to:
"Award contracts to Impressions Marketing and Events, Bullhorn Creative, Field Trip, CESO, 418 Communications, McBrayer Digital, Current 360, Prosper Media Group "

5. RFP 02-23 Survey Research Services and Platform

BACKGROUND AND RATIONALE:
Fayette County Public Schools is soliciting proposals from qualified, experienced, survey research firms or individuals interested in providing survey research services, and a unified survey platform for all school and district surveys. The district's recently adopted New Way Forward Strategic Plan identifies the following five priority areas: Student achievement, Diversity, equity, inclusion, and belonging, Highly effective and culturally responsive workforce, Engagement and outreach, and Organizational health and efficiency. Measuring progress in several of these areas will require the use of annual surveys to first set a baseline and then assess improvement over time. The RFP will be evaluated based on experience, qualifications, abilities, implementation strategy, availability to complete work, cost and references. We received 4 proposals and it is recommended to award the contract to Qualtrics.

Key to Markings
Recommended Award

Vendor	**Score**
Qualtrics	94/100 ###
Panorama Education Inc	85/100
Teach Upbeat	72/100
The Hanover Research Council	68/100

Contract Period: January 1, 2023 and ending June 30, 2023 with option to renew

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Survey Research Services and Platform	$141,180.00	Office of Public Engagement	Recurring	Will provide survey services for the district for the 2023 year

STAFF CONTACT: Lisa Deffendall, Office of Public Engagement

POLICY REFERENCE: KRS 45A.370

RECOMMENDATION: A motion is in order to:
"Award the contract to Qualtrics LLC"

Qualtrics Proposal for

FCPS Survey Research Services and Platform (RFP# 02-23)

Submitted by:

David Black

Enterprise Sales | SLED

dblack@qualtrics.com

(619) 961-6534

Fayette County Public Schools

Lexington, Kentucky

qualtrics XM

qualtrics.XM

Qualtrics, LLC
333 W. River Park Dr.
Provo, UT 84604
support@qualtrics.com
(801) 374-6682

7 December 2022

To Whom It May Concern:

Thank you for considering Qualtrics as a solution for your current business needs. We are happy to provide the necessary information to help Fayette County Public Schools see the value Qualtrics' services can bring to your organization. The information contained in our submission is provided in good faith and is true and correct to the best of our knowledge as of the date of submission. The proposal documents themselves will not be included in the final agreement. With this in mind, we are writing in response to your proposal documentation.

Many customers require acceptance of lengthy contracts or terms and conditions during this early evaluation stage. Here at Qualtrics, our position is to engage in legal, security and insurance discussions after our customers have chosen us as a vendor. We are writing in response to your proposal documentation, including but not limited to Page 2, General Terms and Conditions (including Sections 1, 2, 13, 24- first sentence, 36, 38, 39, 40, 46, and 50), and Special Terms and Conditions (including Sections 14 and 15).

We invite your organization to review our General Terms and Conditions at https://qualtrics.com/terms-of-service, which provide insight into how our services work and the corresponding mutual terms we feel are necessary to create a great relationship. Upon request, a Word version of these terms may be provided for your review. Additionally, Qualtrics is covered under the insurance policies of our parent company, SAP. Current Certificates of Insurance (COIs) detailing Qualtrics' coverage are available for your review, as applicable, at https://sap.com/ecoi. Further, with thousands of customers, we are not able to commit to any individual customer's code of business conduct, but we maintain our own industry-standard Code of Ethics & Business Conduct, which is available at https://qualtrics.gcs-web.com/static-files/0a47eba5-0554-40f5-b532-6740c5c860c2.

Upon award to Qualtrics, our legal and security teams will be quick to respond and reasonable in our discussions. We understand the constraints that you may be facing and will work to a successful resolution that is agreeable for both parties.

We look forward to working with your organization.

Sincerely,

Mark Creer
Director

CHECKLIST OF ITEMS TO INCLUDE WITH PROPOSAL SUBMISSION

__X__ Cover page completed
Please see Legal Letter Name and signature on Page 2
__X__ Taxpayer Identification Number (if not a Corporation)
__X__ Technical Proposal
__X__ References
__X__ Cost Proposal
__N/A__ Resident Bidder Affidavit if declaring Resident Bidder Status
__X__ Supplier Diversity Program Contract Forms (If applicable)
__N/A__ Documentation of Good Faith Efforts (If applicable)
__X__ Completed W9 form
__X__ Proof of Insurance

Does your company allow EFT? Yes ____ No _X_
If yes please send a completed EFT Authorization Form to our Accounts Payable Department upon award of bid.

Thank you for providing this information:

1. [ ] Yes I am a minority owned business. Certified [ ] Not Certified [ ]
   [X] No If "yes" please identify type:
   African American [ ] Hispanic American [ ]
   Asian Pacific Islander [ ] Native American [ ]

2. [ ] Yes I am a woman owned business. Certified [ ] Not Certified [ ]
   [X No

3. [ ] Yes I am a veteran owned business. Certified [ ] Not Certified [ ]
   [X] No

   If "yes" and certified please include a copy of certification.

4. [ ] Yes I am current employee of the Fayette County Public Schools or a retiree of any
   [X] No KY School District?

Part I

Forms

FAYETTE COUNTY PUBLIC SCHOOLS

PURCHASING DEPARTMENT, ROOM 137
1126 RUSSELL CAVE ROAD
LEXINGTON, KY 40505
www.fcps.net/bids

Request for Proposals Number and Title RFP 02-23 Survey Research Services and Platform	**Department** Office of Public Engagement
Due Date/Time: December 8, 2022 by 2:00 PM Local Time (EST)	**Term of Contract** January 1 – June 30, 2023

FCPS now uses Vendor Registry for all of our Bids and RFPs. Any notifications, including amendments to bids, post bid award notices and future bid advertisements, will be made through Vendor Registry. Please register as a vendor by following the link at www.fcps.net/bids and keep your profile updated to insure you are up to date on all FCPS Bids. You must follow the link above in order to not be charged by Vendor Registry.

Qualtrics, LLC
Firm Name

333 W River Park Dr
Address

Provo, UT 84604
City/State/Zip

801-374-6682 / 866-562-9828
Telephone/Fax

notice@qualtrics.com
Email

___/___/___ or 45-4964116
Social Security Number or **Employer Identification Number**

PLEDGE OF NON-DISCRIMINATION

Qualtrics, LLC, is responding to RFP/BID # 02-23 issued

Insert Name of Company (hereinafter "Company")

by the Board of Education of Fayette County, Kentucky, and hereby pledges:

(1) No person shall be excluded from participation in, denied the benefit of, or otherwise discriminated against on the basis of race, color, national origin, sex, genetic information, disability, religion, age, political affiliation, sexual orientation or gender identity in connection with the performance of any contract award by the district on this RFP/BID.

(2) The Company shall provide equal opportunity to all business persons seeking to contract or otherwise interested in contracting with this Company, including various local small business enterprises;

~~(3) The Company has been made aware of, understands and agrees to make good faith efforts to solicit MBE/WBE/VBEs to do business with this Company in the performance of work on any contract awarded on this RFP/BID.~~

~~The Company acknowledges that failure to make a good faith effort may have a negative impact on future contract opportunities.~~

(Authorized Company Representative Signature)

7 December 2022

Date

Mark Creer, Director

Print Name and Title

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ Go to *www.irs.gov/FormW9* for instructions and the latest information.

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

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Qualtrics, LLC

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☑ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ P

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) ________

Exemption from FATCA reporting code (if any) ________

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
333 West River Park Dr.

Requester's name and address (optional)

6 City, state, and ZIP code
Provo, UT 84604

7 List account number(s) here (optional)

Part I **Taxpayer Identification Number (TIN)**

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

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
[ ][ ][ ] – [ ][ ] – [ ][ ][ ][ ]

or

Employer identification number
4 5 – 4 9 6 4 1 1 6

Part II **Certification**

Under penalties of perjury, I certify that:

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

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

Sign Here Signature of U.S. person ▶ DocuSigned by: Rob Bachman Date ▶ January 10, 2022

General Instructions

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

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

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

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

By signing the filled-out form, you:

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

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

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

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting,* later, for further information.

Note: If you are a U.S. person and 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 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 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 section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.

2. The treaty article addressing the income.

3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.

4. The type and amount of income that qualifies for the exemption from tax.

5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,

2. You do not certify your TIN when required (see the instructions for Part II for details),

3. The IRS tells the requester that you furnished an incorrect TIN,

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or

5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code,* later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships,* earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code,* later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of $50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a $500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)

2—The United States or any of its agencies or instrumentalities

3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

4—A foreign government or any of its political subdivisions, agencies, or instrumentalities

5—A corporation

6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession

7—A futures commission merchant registered with the Commodity Futures Trading Commission

8—A real estate investment trust

9—An entity registered at all times during the tax year under the Investment Company Act of 1940

10—A common trust fund operated by a bank under section 584(a)

11—A financial institution

12—A middleman known in the investment community as a nominee or custodian

13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over $600 required to be reported and direct sales over $5,000[1]	Generally, exempt payees 1 through 5[2]
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

[1] See Form 1099-MISC, Miscellaneous Income, and its instructions.

[2] However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester,* later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at *www.SSA.gov*. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at *www.irs.gov/Businesses* and clicking on Employer Identification Number (EIN) under Starting a Business. Go to *www.irs.gov/Forms* to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to *www.irs.gov/OrderForms* to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account[1]
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor[2]
5. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee[1] The actual owner[1]
6. Sole proprietorship or disregarded entity owned by an individual	The owner[3]
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity[4]
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

[1] List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

[2] Circle the minor's name and furnish the minor's SSN.

[3] You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

[4] List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to *phishing@irs.gov*. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at *spam@uce.gov* or report them at *www.ftc.gov/complaint*. You can contact the FTC at *www.ftc.gov/idtheft* or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see *www.IdentityTheft.gov* and Pub. 5027.

Visit *www.irs.gov/IdentityTheft* to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

ACORD® CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY) 10/25/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS 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 INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or 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).

Holder Identifier :

PRODUCER	CONTACT NAME:		
Aon Risk Services Central, Inc. Philadelphia PA Office 100 North 18th Street 15th Floor Philadelphia PA 19103 USA	PHONE (A/C. No. Ext): (866) 283-7122	FAX (A/C. No.): (800) 363-0105	
	E-MAIL ADDRESS:		
	INSURER(S) AFFORDING COVERAGE		NAIC #
INSURED	INSURER A: XL Insurance America Inc		24554
SAP America Inc Attn: Kathleen O'Donnell 3999 West Chester Pike Newtown Square PA 19073 USA	INSURER B: AIU Insurance Company		19399
	INSURER C: National Union Fire Ins Co of Pittsburgh		19445
	INSURER D:		
	INSURER E:		
	INSURER F:		

COVERAGES **CERTIFICATE NUMBER:** 570096197405 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. **Limits shown are as requested**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE [X] OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY PRO-JECT LOC OTHER:			US00099181LI22A SIR applies per policy terms & conditions	04/01/2022	04/01/2023	EACH OCCURRENCE	$1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$100,000
							MED EXP (Any one person)	$5,000
							PERSONAL & ADV INJURY	$1,000,000
							GENERAL AGGREGATE	$2,000,000
							PRODUCTS - COMP/OP AGG	$3,000,000
							Pers/Adv Inj SIR	$650,000
C	AUTOMOBILE LIABILITY X ANY AUTO OWNED AUTOS ONLY SCHEDULED AUTOS HIRED AUTOS ONLY NON-OWNED AUTOS ONLY			AL 1722408	09/30/2022	09/30/2023	COMBINED SINGLE LIMIT (Ea accident)	$2,000,000
							BODILY INJURY (Per person)	
							BODILY INJURY (Per accident)	
							PROPERTY DAMAGE (Per accident)	
A	X UMBRELLA LIAB X OCCUR EXCESS LIAB CLAIMS-MADE DED X RETENTION $10,000			US00099182LI22A	04/01/2022	04/01/2023	EACH OCCURRENCE	$5,000,000
							AGGREGATE	$5,000,000
B B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) N If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		WC013759845 AOS WC013759846 CA	09/30/2022 09/30/2022	09/30/2023 09/30/2023	X PER STATUTE OTH-ER	
							E.L. EACH ACCIDENT	$1,000,000
							E.L. DISEASE-EA EMPLOYEE	$1,000,000
							E.L. DISEASE-POLICY LIMIT	$1,000,000

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

Evidence of Insurance.

Certificate No : 570096197405

CERTIFICATE HOLDER	CANCELLATION
SAP America Inc. Attn: Kathleen O'Donnell 3999 West Chester Pike Newtown Square PA 19073 USA	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE *Aon Risk Services Central Inc*

AGENCY CUSTOMER ID: 10194755
LOC #:

ADDITIONAL REMARKS SCHEDULE

AGENCY	NAMED INSURED
Aon Risk Services Central, Inc.	SAP America Inc
POLICY NUMBER: See Certificate Number: 570096197405	
CARRIER: See Certificate Number: 570096197405 — NAIC CODE:	EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER	
INSURER	
INSURER	
INSURER	

ADDITIONAL POLICIES If a policy below does not include limit information, refer to the corresponding policy on the ACORD certificate form for policy limits.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YYYY)	POLICY EXPIRATION DATE (MM/DD/YYYY)	LIMITS	
	WORKERS COMPENSATION							
B		N/A		WC013759847 WI	09/30/2022	09/30/2023		

AGENCY CUSTOMER ID: 10194755

LOC #:

ACORD®

ADDITIONAL REMARKS SCHEDULE

AGENCY	NAMED INSURED
Aon Risk Services Central, Inc.	SAP America Inc
POLICY NUMBER: See Certificate Number: 570096197405	
CARRIER: See Certificate Number: 570096197405 / NAIC CODE:	EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: ACORD 25 **FORM TITLE:** Certificate of Liability Insurance

Description

The Named Insured includes SAP America, Inc. and its subsidiaries and affiliates including, but is not limited to the following:
SAP America, Inc., Newtown Square, PA, United States
SAP Labs, LLC, Palo Alto, CA, United States
SAP International, Inc., Miami, FL, United States
SAP Public Services, Inc., Washington, DC, United States
SAP Global Marketing, Inc., New York, NY, United States
SAP National Security Services, Inc., Newtown Square, PA, United States
TomorrowNow, Inc., Bryan, TX, United States
SAP Industries, Inc., Newtown Square, PA, United States
Plat.One Inc., Palo Alto, CA, United States
Volume Integration, Inc., VA, United States
Hipmunk, Inc., San Francisco, CA, United States
SAP.io Fund, L.P., Wilmington, DE, United States
Gigya, Inc., Mountain View, CA, United States
Sapphire Ventures Fund III, L.P., Wilmington, DE, United States
Sybase, Inc., Dublin, CA, United States
Sybase 365, LLC, Dublin, CA, United States
SuccessFactors, Inc., South San Francisco, CA, United States
Plateau Systems LLC, South San Francisco, CA, United States
Ariba, Inc., Palo Alto, CA, United States
hybris (US) Corp., Wilmington, DE, United States
Concur Technologies, Inc., Bellevue, WA, United States
TRX, Inc., Bellevue, WA, United States
Emarsys North America, Inc., United States
Signavio Inc., Burlingtion, United
Qualtrics International Inc., Wilmington, DE, United States
Seite 7 USA Qualtrics, LLC, Wilmington, DE, United States
Q (AGF2) Inc. , Wilmington, DE, United States
Clarabridge Inc., United States
Clarabridge Ltd., United States
Market Metrix (A Clarabridge Company) LLC
Engagor Inc., United States
Usermind, Inc., Delaware, United States
Usermind International, Inc., Delaware, United States
SurveyVitals, Inc., Springtown, United States
Taulia LLC, United States

AGENCY CUSTOMER ID: 10194755

LOC #:

ADDITIONAL REMARKS SCHEDULE

Page _ of _

AGENCY		NAMED INSURED
Aon Risk Services Central, Inc.		SAP America Inc
POLICY NUMBER		
See Certificate Number: 570096197405		
CARRIER	NAIC CODE	
See Certificate Number: 570096197405		EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: ACORD 25 **FORM TITLE:** Certificate of Liability Insurance

Description

Commercial General Liability:
Additional Insured is included when required by written contract and in accordance with the policy provisions of the Commercial General Liability policy.
Waiver of Subrogation is granted when required by written contract (except where not permitted by law), in accordance with the policy provisions of the Commercial General Liability.
Primary and non contributing status shall apply when required by written contract and in accordance with the policy provisions of the Commercial General Liability policy.
Automobile Liability:
Additional Insured is included when required by written contract and in accordance with the policy provisions of the Automobile Liability policy.
Waiver of Subrogation is granted when required by written contract (except where not permitted by law), in accordance with the policy provisions of the Automobile Liability policy.
Auto Liability Coverage is primary for any liability assumed when required by written contract.
Workers' Compensation:
Workers' Compensation Policy #WC048425981 includes employer's liability for monopolistic states of North Dakota, Washington, Wyoming, Ohio.
Waiver of Subrogation is granted when required by written contract (except where not permitted by law), in accordance with the policy provisions of the Workers' Compensation policy.
Umbrella/Excess Liability:
Please note that because the Umbrella/Excess policy terms follow the underlying policies, there are no separate additional insured, waiver of subrogation and primary and non-contributory endorsements applicable to this policy.

Part II

References

Please see below for the required contact and project information for our References. Please note that these references are for both Qualtrics and CESA 6.

Reference 1

mesa PUBLIC SCHOOLS

Company Name and Address	*Mesa Public Schools* *63 East Main Street* *Mesa, Arizona 85201*
Contact Information	*Dr. Robert Carlisle, Director Research and Evaluation* *(480) 472-0230* rdcarlisle@mpsaz.org
Date of Work Undertaken	*MPS initially contracted with Qualtrics in 2017, launching their first project, and continues to use Qualtrics as an enterprise experience management platform.*
Description(s) of Work	*Various projects have been successfully implemented at Mesa Public Schools, including Student SEL surveys, Satisfaction Surveys with district services and departments, Parent and Community outreach and feedback on strategic initiatives such as KPIs, school calendars, as well as employee engagement, and various Role-based dashboard projects.*

Reference 2

Oklahoma City PUBLIC SCHOOLS

Company Name and Address	*Oklahoma City Public Schools* *615 N. Classen Blvd* *Oklahoma City, Oklahoma 73106*
Contact Information	*J. M'lou Smith, Ph.D., Director of Research and Data Strategy* *(405) 587-1437* jmsmith@okcps.org
Date of Work Undertaken	*OKCPS initially contracted with Qualtrics in 2017, launching their first project, and continues to use Qualtrics as an enterprise experience management platform.*
Description(s) of Work	*Various projects have been successfully implemented at OKCPS, including Climate surveys, Voice of the Student survey, Parent Engagement survey, Employee Engagement survey, Community/Brand Engagement, survey, Budget survey, Senior surveys, Student Scorecard dashboards, Role-based dashboards, Public Facing dashboards.*

Reference 3

Company Name and Address	*Killeen Independent School District* *200 N. WS Young Dr.* *Killeen, Texas 76543*
Contact Information	*Taina Maya, Chief Communications and Marketing Officer* *(254) 336-0174* Taina.Maya@killeenisd.org
Date of Work Undertaken	*September 2022*
Description(s) of Work	*Killeen ISD launched their first project with Qualtrics this year, and have successfully deployed Climate Surveys for parents, community, employees, and students with the results and data visualized on a Public-facing Dashboard.*

Part III

Technical Proposal

qualtrics.XM

Table of Contents – Technical Proposal

Executive Summary

Fayette County Public Schools (hereinafter "FCPS") has a number of opportunities to drive meaningful impact by providing critical learning experiences for students. In this proposal, we will describe our unified solution to address challenges in the district through our experience management platform, which will provide a unified survey platform for all school and district surveys and provide survey research services. As we propose a long-term partnership with Fayette County Public Schools, we also want to briefly outline our unique ability to strengthen your district and improve the experiences of students, families, and staff. We call this experience management.

QUALTRICS EXPERIENCE MANAGEMENT: Qualtrics is the only platform that can measure every experience in the student, family, and staff member journeys and tie them all together to tell the complete story of your district. Qualtrics Experience Management (XM) does so with five core capabilities:

- **Single System.** Our platform connects and correlates operational data (demographic data, attendance, grades, etc) with experience (survey) data on a single system that includes student, staff, and family experience, allowing the school district to understand, prioritize, and take action on key experience drivers and deliver key educational outcomes.
- **Conversational.** Qualtrics captures human factor data—people's emotions, beliefs, sentiments, stated preferences, etc.—in a simplified way that includes direct, indirect, unsolicited, and inferred contact. This allows district leaders to have an ongoing conversation with stakeholders.
- **Democratized.** Our platform has an easy-to-use, point-and-click, and configurable interface, enabling everyone in a school district —from the frontline staff like teachers and principals to leadership staff like district superintendents and central office staff —to collect, analyze, distribute, and take action on experience data, side-by-side with operational data.
- **Flexible.** Easy integration with existing technology, processes, and culture is a must for an district-wide platform. Further, our technology is user-configurable and scalable, allowing districts to start small and scale once programs are tested, optimized, and ready for expansion.
- **Predictive.** Advanced statistical capabilities set Qualtrics apart. This capability allows school districts to understand and even predict the needs of stakeholders to automate parts of stakeholder experience programs, such as questionnaire building, recommended actions, automatic responses, distribution logic, etc.

BRING TOGETHER OPERATIONAL AND EXPERIENCE DATA: As a research platform, Qualtrics pulls experience data (survey results, social media posts, complaints, etc.) together with operational data (demographic data, grades, attendance, staff attrition, product usage, etc.) to create vital insights. Education leaders around the district will understand what is going on in real-time, why it is happening, and how to act to help drive the outcomes that matter.

With more than 16,750 enterprise clients worldwide, we have a unique perspective as thought leaders on where trends are going and what will define the best organizations, including school districts and private companies, in the years to come. To lead out on the survey research service side, we will work with CESA 6, our preferred K-12 education services partner. CESA 6 has led dozens of K-12 school district implementations and add a highly specialized education lens to set up the experience management platform and design surveys for Fayette County. Together, we want to help Fayette County Public Schools reach its potential to serve students and the broader community, and we will work tirelessly as your partner to get you there.

Corporate Overviews

We have provided separate overviews for Qualtrics and CESA 6. Please note, Qualtrics will be providing the technology platform and accompanying support services, and CESA 6 will be providing the professional services to implement the proposed solution and provide survey research services. Thus the information below, including references, will reflect our capabilities and experience in these areas. For information regarding our collective experience providing survey and experience management technologies for educational institutions throughout the United States, please see our References.

Qualtrics Corporate Overview, Key Personnel, and Financials

Corporate Information	
Headquarters Address	*333 W River Park Dr.* *Provo, UT 84604* *United States*
Contact Number	*(801) 374-6682*
Ticker Symbol	*XM*
Majority Owner	*SAP*
DUNS	*07-866-3964*
FEIN	*45-4964116*

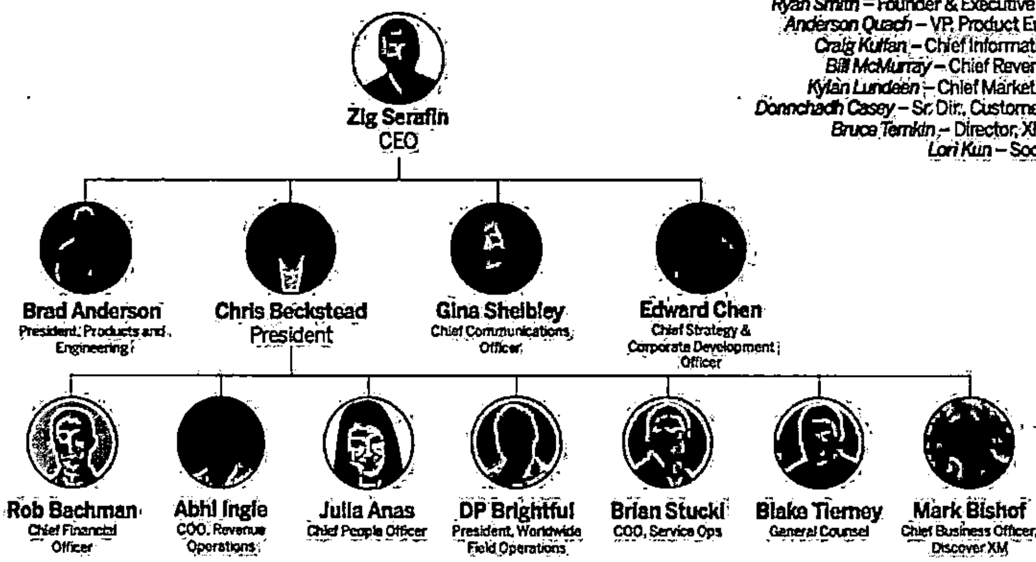
Overview

Qualtrics is the world's leading enterprise survey technology provider. We were founded in 2002 by Scott Smith, Ryan Smith, Jared Smith, and Stuart Orgill with a belief that we could revolutionize the way people did research. In March 2017, we declared our vision for how future industry leaders will measure the strength of their organization: Experience Management. We unveiled Qualtrics Experience Management (XM), a revolutionary software platform that allows organizations to tie all of their customer, employee, brand, and product experience research together with operational data to direct their trajectory. Enterprises, academic institutions, and government agencies rely on Qualtrics XM to gather and understand customer satisfaction, net promotor scores (NPS), customer experience, brand, market, and employee feedback to inform their data-driven business decisions.

qualtrics XM

Qualtrics Organization Chart

Key Leaders
Ryan Smith – Founder & Executive Chairman
Anderson Quach – VP, Product Engineering
Craig Kufan – Chief Information Officer
Bill McMurray – Chief Revenue Officer
Kylan Lundeen – Chief Marketing Officer
Donnchadh Casey – Sr. Dir., Customer Success
Bruce Temkin – Director, XM Institute
Lori Kun – Social Impact



- Ryan Smith (Founder, Executive Chair, and Director) founded Qualtrics in 2002.
- Zig Serafin (CEO and Director) has been with Qualtrics since 2016.
- Chris Beckstead (President and Board Overseer) has been with Qualtrics since 2013.
- Brad Anderson (President of Products and Engineering) has been with Qualtrics since 2021.
- Edward Chen (Chief Strategy and CDO) has been with Qualtrics since 2021.
- Gina Sheibley (CCO) has been with Qualtrics since 2021.
- Rob Bachman (CFO) has been with Qualtrics since 2013.
- Julia Anas (Chief People Officer) has been with Qualtrics since 2021.
- DP Brightful (President, Worldwide Field Operations) has been with Qualtrics since 2021.
- Brian Stucki (COO, Service Operations) has been with Qualtrics since 2015.
- Abhi Ingle (COO, Revenue Operations) has been with Qualtrics since 2021.
- Bill McMurray (CRO) has been with Qualtrics since 2014.
- Kylan Lundeen (Chief Marketing Officer) has been with Qualtrics since 2012.
- Blake Tierney (General Counsel) has been with Qualtrics since 2014.
- Mark Bishof (Chief Business Officer, Discover XM) has been with Qualtrics since 2016.

Today, Qualtrics serves more than 16,750 enterprises worldwide, more than 88% of the Fortune 100, 99 of the top 100 US business schools, and 800+ government organization. Our platform collects over 3 billion responses annually in support of customer, employee, product, brand, and every other kind of research. They partner with us not only because of our industry-leading technology, but because of the innovations our 800+ software engineers are adding to the platform daily to save organizations time, money, and help them do research and analysis to understand experiences scale.

Historically, Qualtrics' client retention rate is around 90%. As of June 30, 2022, our net retention rate was 126%. Our net retention rate was 128% as of December 31, 2021. Our net retention rate was 120% and 125% as of December 31, 2020 and 2019, respectively.

Qualtrics, a Global Company

Qualtrics is a global company. We have offices in 17 countries, including the United States. We have listed our regional headquarters and office locations below.

Americas

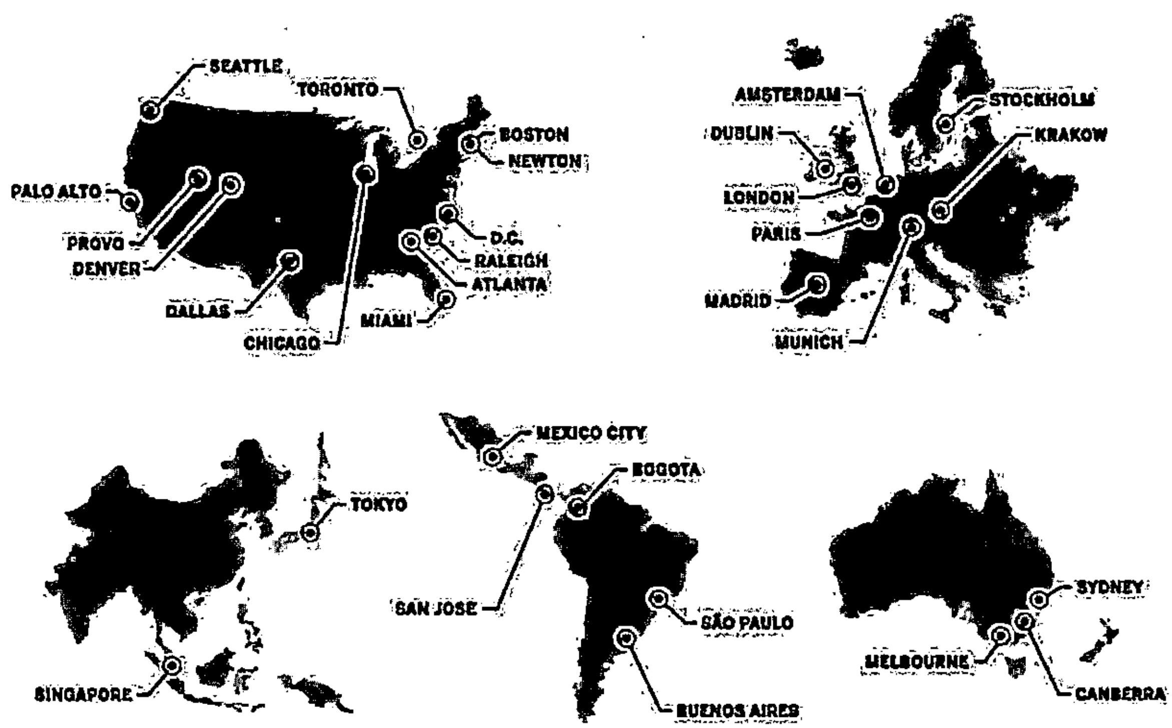
- Provo, UT - Corporate Headquarters
- Seattle, WA - Engineering Headquarters
- Dallas, TX
- Chicago, IL
- Raleigh, NC
- Washington, D.C
- Palo Alto, CA
- Denver, CO
- Boston, MA
- Atlanta, GA
- Miami, FL
- Toronto, Canada
- Mexico City, Mexico
- San José, Costa Rica
- Bogotá, Colombia
- São Paulo, Brazil
- Buenos Aires, Argentina

EMEA

- Dublin, Ireland - Regional Headquarters
- Krakow, Poland - Engineering Specific
- London, England
- Munich, Germany
- Paris, France
- Amsterdam, Netherlands
- Madrid, Spain
- Stockholm, Sweden

APJ

- Sydney, Australia - Regional Headquarters
- Canberra, Australia
- Melbourne, Australia
- Tokyo, Japan
- Singapore



Qualtrics supports our global client base from locations across the globe. We currently support more than 16,000 clients from more than 90 different countries.

Qualtrics Core Products

Our Platform, Solutions, and Technology: Our XM Platform was built to provide flexible, scalable solutions for our clients. We use a secure, modern data processing architecture to ensure the specific needs of our clients are met across their organizations. Clients can deploy experience management modules or choose to access the entire XM Platform and add on specific solutions as their needs evolve. We offer over 100 out-of-the-box integrations, with leading enterprise vendors such as SAP, Microsoft, and Salesforce, as well as custom integrations for our clients. Our architecture is designed to scale 6 horizontally and cost-effectively by combining the Platform-as-a-Service offerings and modern open-source technology stacks running within our co-location data centers. We offer a range of experience management solutions, including Integrated Solutions for experience design, customer experience, employee experience, product experience, and brand experience––all built on the Qualtrics XM Platform, a collection of powerful capabilities, tools, and building blocks.

Qualtrics CustomerXM™

Our CustomerXM solution is a system of action that enables organizations to gain a true understanding across all forces that impact the customer experience and surfaces these insights in real-time to drive improvements in both micro-level issues (e.g., specific customer remediation situations) and in macro-level issues (e.g., systemic problems with customer care experiences or broken digital journeys). With Qualtrics, organizations can capture, analyze and then act on customer sentiment across all channels and touchpoints along the customer lifecycle. It provides customer-focused analytics, native to the XM Platform, automated action and workflow capabilities, and no-code/ low-code integrations that help organizations take effective, data-driven actions that lead to higher new customer acquisition, reduced customer churn, increased share of wallet, and lower costs to acquire and serve customers.

At the core of our CustomerXM solution is our customer-centric data management system, which consolidates all experience data across all touchpoints, along with relevant operational data, into a single system of record. This enables personalized experiences at scale, deep journey and segment intelligence, and predictions about future behavior. Our listening engine enables omnichannel engagement and data collection across in-app, SMS, interactive voice response, or IVR, chat and call center platforms, messaging apps, social media and review sites, video, voice, email, and more. Qualtrics iQ, native to the XM Platform, analyzes this data in real-time, surfacing recommended actions tailored by role and department. With low/no-code automated actions and workflows, as well as our open developer platform, organizations can quickly take action and deeply embed CustomerXM within existing operational workflow systems. This drives high adoption and action taking across the entire organization, which ultimately leads to meaningful change and business outcomes.

Qualtrics EmployeeXM™

Our EmployeeXM solution provides a holistic view of an employee's experience to help companies reduce unwanted attrition, improve employee engagement, develop and retain top performers, improve customer experience, drive productivity, and build strong teams and cultures. It allows organizations to draw insights from their employees and continuously improve every facet of the employee experience during the employment lifecycle — from recruitment onwards.

We have architected our EmployeeXM solution to meet the exacting requirements of human resource managers. It features workflows that enable employees to seek the right feedback from across the organization, robust administrator rights that enable higher anonymity thresholds, interactive data visualization that conveys the right information to each user, and expert-designed, guided action planning surfacing the areas where potential improvements would drive the highest impact. The solution also integrates with a number of HCM and Learning Management System, or LMS, vendors.

Qualtrics ProductXM™

Our ProductXM solution helps organizations more successfully build and maintain products and services that their customers love by understanding demand and experience signals across all phases of the product life cycle. This solution identifies actionable insights from identifying a target market, uncovering unmet needs to concept development, and initial product marketing. Organizations can quickly determine the top drivers of product satisfaction and loyalty and incorporate experience insights into key product decisions, assisting in product feature prioritization, increasing product decision velocity, and building a customer and data-driven product roadmap.

Our ProductXM solution packages our omnichannel listening capabilities, insights from structured and unstructured data, and automated workflows and actions in a turnkey, guided, easy-to-use user interface that enables anyone without a degree in statistics to make smart data-driven product decisions. It seamlessly supports contextual operational data such as cost of production, margins, or clickstream behavioral data to augment human factor data, which enables product teams to identify actionable insights such as key drivers of retention, engagement, or profit-maximizing scenarios. With our ProductXM capabilities, product teams can continuously tune their products and services through every phase of the product life cycle.

Qualtrics BrandXM™

Our BrandXM solution provides a complete view of all brand experience drivers across the brand funnel from awareness to purchase and post-purchase experience to increase new customer acquisitions, repeat purchases, and share of wallet. This solution delivers automated, real-time analysis to help organizations understand how to improve brand perception and experiences relative to competitors at a specific market and segment level. Marketing teams can quickly optimize brand advertising and communication strategies, as well as work across the organization to improve the experiences that matter most. Our BrandXM solution provides real-time, role-based insights that help organizations take the right actions to improve brand perception. It includes workflows that integrate with marketing platforms and other operational systems that enable organizations to improve how a brand is experienced by customers and potential customers alike.

Qualtrics DesignXM™

Our DesignXM solution helps organizations uncover the products, services, brands, and cultures that customers and employees want next. Our software helps teams connect with people in authentic ways to create new experiences that shift markets, define brands, establish cultures, and attract new customers. These tools are used by market research professionals, marketing teams, product teams, HR teams, academics, insights professionals, data analysts, and developers to do advanced market, customer, and employee research. These customers use DesignXM to adopt a self-service approach to conducting a wide variety of research projects that formerly required hiring expensive outsourced consultants. Our DesignXM solution can be purchased as software-only or can be packaged with expert research services delivered in-house, or via our ecosystem partners.

Staffing Plan and Key Personnel

In addition to the 24/7 Qualtrics support staff that will be available to FCPS, the following Qualtrics resources (i.e., Account Executive and Customer Success Manager) will serve as points of contact for FCPS. Please note that other than the Account Executive, the Customer Success Manager will be assigned upon contract execution. Furthermore, while we have developed this model through our experience supporting similar programs, we welcome the opportunity to further refine the support structure to ensure that we meet your needs.

Account Executive – David Black

David has been serving school districts exclusively as a K-12 Account Executive since 2007. He will be your initial point of contact, and take a hands on approach in managing this relationship and act as an escalation point for FCPS.

Customer Success Manager

As a key member and long-term point of contact for your account team, the customer success manager helps drive value realization, coordination across markets, advises on program optimization and new use cases, and provides a quarterly business review with key stakeholders.

Financial Capabilities

With $1.1B annual revenue in Fiscal Year 2021, Qualtrics brings the financial stability, resources, expertise, and cash flow required to implement and support the proposed solution and FCPS as you work to drive your long-term strategic goals. Over the last 3 years, our financial performance has continued to improve with consistent growth, including $591.2 M consolidated revenue in 2019, $763.5M consolidated revenue in 2020, and $1.1B consolidated revenue in 2021. Our continual reinvestment of revenue back into our business in the form R&D, new products, acquisitions, marketing activities, and international expansion ensures we will be able to continue our growth in annual revenue in the upcoming fiscal years. For more information about our financials, please follow the links provided below for our publicly available reports covering our financial performance back to 2018.

2018 - 2020
https://www.qualtrics.com/investors/

2021 - Present
https://www.qualtrics.com/investors/annual-reports-proxies

CESA 6 Corporate Overview, Key Personnel, and Financials

Corporate Information	
Headquarters Address	*2300 WI-44* *Oshkosh, Wisconsin 54904*
Contact Number	*(920) 233-2372*

Overview

CESA 6 is a non-profit organization that provides solutions to school systems to maximize success. The agency makes it possible for schools, regardless of size, to work together to share staff, save money and extend educational opportunities to all children. CESA 6's Learning & Assessment Center provides a learner-centered, system approach to inspire and influence leadership is private and public school districts for increased student achievement through a process rich in data. As Qualtrics's K-12 partner, we can show you how to use data to improve performance effectiveness and drive continuous improvement practices that result in greater student success

CESA 6 Locations

CESA 6 has one location in Oshkosh, Wisconsin, but CESA 6 consultants work remotely.

CESA 6 Core Products and Services – An Education Focused Company

Cooperative Educational Service Agency (CESA) 6, is a service provider for K-12 school districts across the state of Wisconsin, and throughout the broader United States. CESA 6 is a proud member of the Qualtrics Partner Network, a network of service agencies providing implementation and consulting services to Qualtrics user districts that are customized to the client's needs. You can view our departmental & consultant profiles here.

What A Partnership with CESA 6 Looks Like

Qualtrics Technical Expertise Our team has applied experience using and training on the following Qualtrics systems:		
• Surveys • Dashboards	• Workflows • Ticketing	• Stats IQ & Text IQ • XM Directory
K-12 Expertise Our team of consultants has decades of experience in K-12 education, having served as teachers, principals, assessment coordinators, district-level administrators, and assistant superintendents. Our team is up to date on current educational research and can help maximize your use of Qualtrics by aligning seamlessly with the K-12 space. In addition to technical expertise, working with our team also provides assistance with the following areas:		
Design Consultation	Data Analysis & Reporting	Evidence-Based Action
Our consultants will listen to understand your implementation needs, and provide advice on how to streamline the project to maximize value.	Our consultants will assist with the analysis and reporting of implementation data, including recommendations for visualizations and comparisons that reach beyond the most common.	Our consultants will help apply the data to continuous improvement actions, through advice on how to turn your implementation project into a data system rather than a data event.

Staffing Plan and Key Personnel

Your implementation team will include the following core team members:

- Dr. Nick Kohn | Lead Implementer | Resume
- Michelle Plaushines | Lead Implementer | Resume
- Josh Borzick | Lead Implementer | Resume

Roles and Responsibilities of Implementation/Consulting Team:

- Responsible for success of the program
- Action Item Management
- Provide status update to customer on ongoing basis
- Oversee structure & execution of implementation
- Primary customer point of contact during implementation
- Owning customer deliverables
- Project tracking
- Platform Training
- Solution Handover
- Post Launch Support

References

Please see below for the required contact and project information for our References. Please note that these references are for both Qualtrics and CESA 6.

Reference 1

mesa PUBLIC SCHOOLS

Company Name and Address	*Mesa Public Schools* *63 East Main Street* *Mesa, Arizona 85201*
Contact Information	*Dr. Robert Carlisle, Director Research and Evaluation* *(480) 472-0230* rdcarlisle@mpsaz.org
Date of Work Undertaken	*MPS initially contracted with Qualtrics in 2017, launching their first project, and continues to use Qualtrics as an enterprise experience management platform.*
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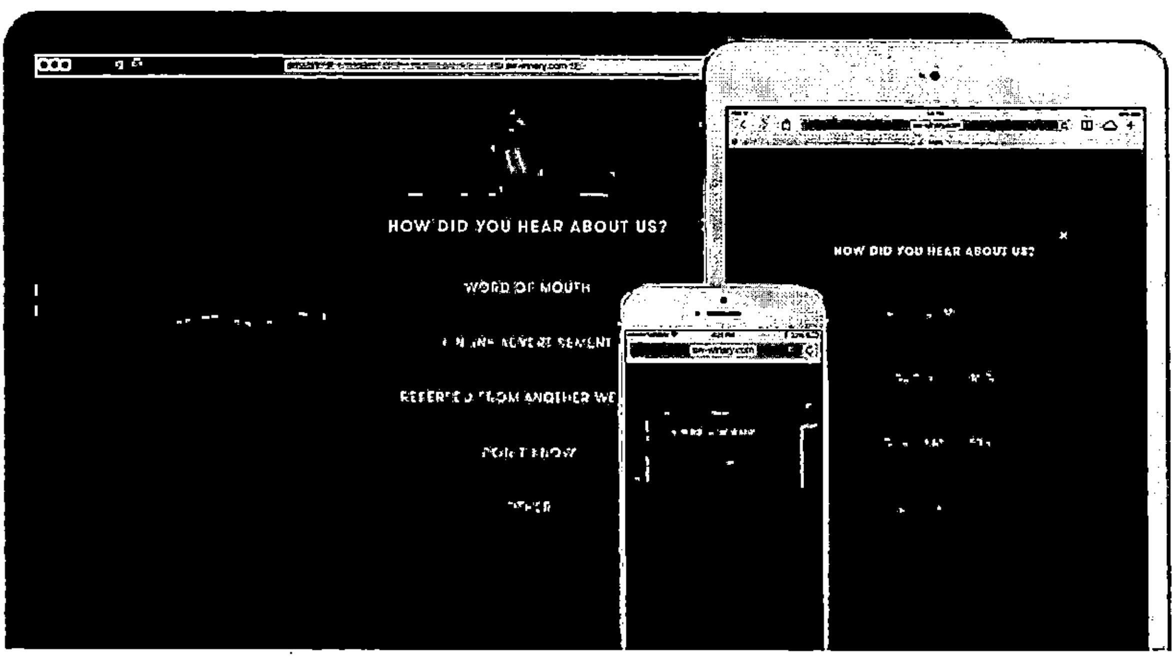
Understanding of Survey Platform Requirements

To meet requirements for a survey tool that will both enable FCPS to actively solicit engagement information from your stakeholders and allow the selected professional survey research services firm to collect, analyze, and report on survey data, Qualtrics proposes our DesignXM product. DesignXM will give both FCPS access to rapid on-demand, high quality insights from your stakeholders, including your teachers, staff, community partners, and potentially the families they serve. DesignXM, which has both built using the native functionalities of our experience management platform Qualtrics Core XM, enables FCPS to quickly get the understanding you are looking for by providing the business capabilities to:

- Measure & Baseline - Measure experience at every touchpoint along your stakeholder's journey and establish baselines against which to measure future performance.
- Prioritize & Predict - Predict needs and trends. Identify and prioritize key drivers of their experience. Improve the quality of your survey-based research projects.
- Act & Optimize - Track progress against baselines, and drive continuous experience improvement through closed-loop feedback and strategic experience improvement initiatives.
- Evolve & Adapt –Rapidly respond to changing landscapes of stakeholder sentiment by being able to quickly and effectively conduct survey-based research projects

Measure & Baseline – Listen and Communicate

In the Internet of Things age, more of your interactions with your stakeholders are happening online, in-app, and beyond. This means that more of your customer's experiences and perceptions will be based on purely digital interactions. Qualtrics is the only platform powerful enough to provide an omni-channel view of your stakeholders' experiences across any digital interaction today and wherever the future may go.

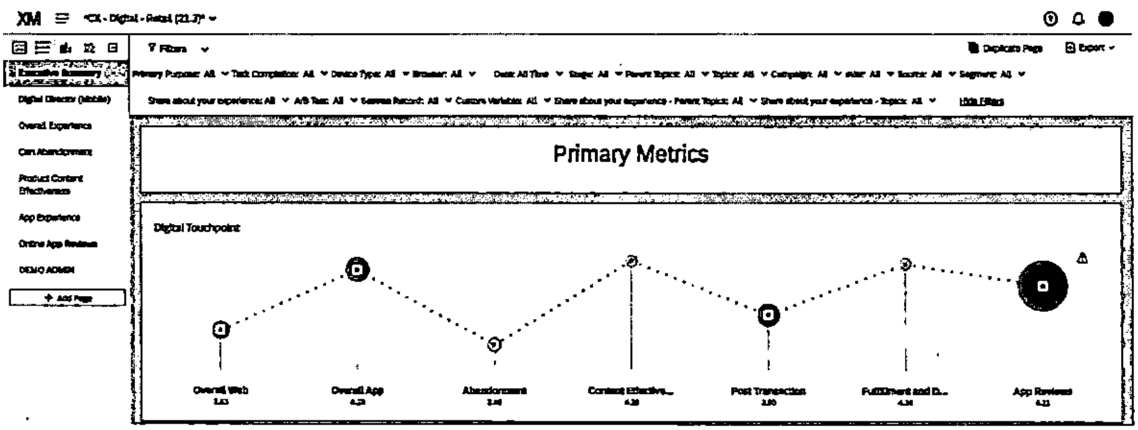


- Prioritize and predict how digital experiences impact your overall customer experience.
- Engage with users in key digital journeys with sophisticated targeting using over 20 behavioral, location, and device variables.
- Optimize conversions and ensure that your digital interactions improve your brand experience rather than detract from it.

Measure & Baseline – Start Conversations in Key Moments

Wherever and however your stakeholders interact with you, talk to you, or talk about you — Qualtrics can create a natural conversation between you and them. Understanding and mapping your stakeholder's journeys will allow FCPS to measure, visualize, and analyze your stakeholder's experiences across multiple touchpoints, meaning that you are no longer limited to seeing siloed, point-in-time experiences. Qualtrics allows you to identify journey objectives, stakeholder personas, moments that matter, significant touchpoints, and key sources of data for these touchpoints. It enables you to assess:

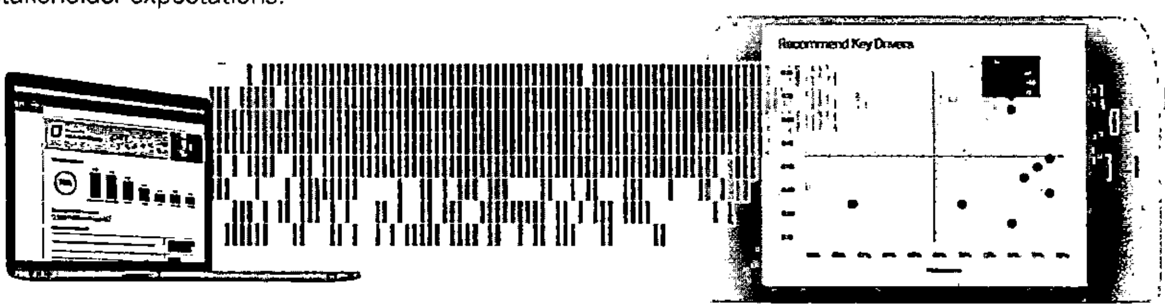
- Insights – from your existing stakeholder journey, how to understand it better
- Impact – how to optimize budgets and effort for changes we want to make to the stakeholder experience
- Issues/opportunities – Diagnose the existing stakeholder journey
- Innovation – where you might want to completely change the existing stakeholder experience



Customize the Respondent Funnel to see the metrics you want in your Dashboard.

Prioritize & Predict – Streamline workflows with Predictive Intelligence

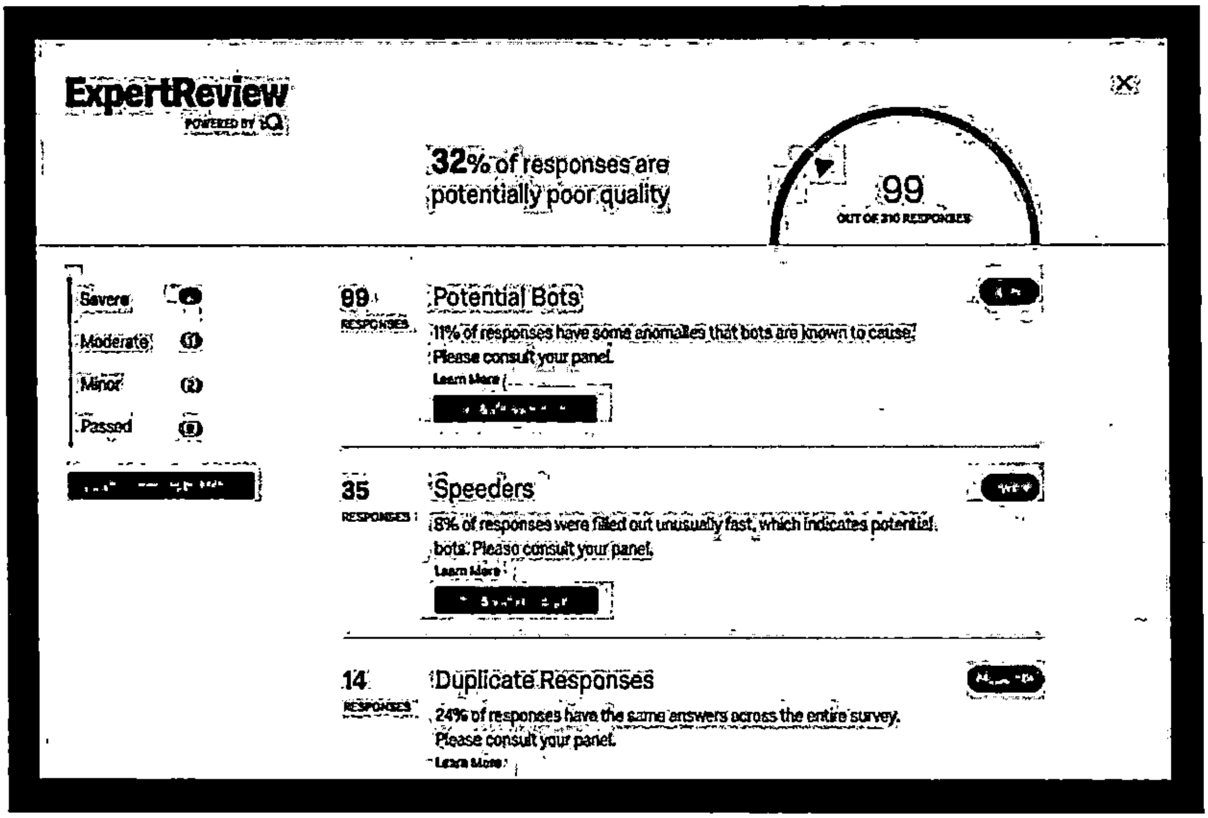
Qualtrics predictive intelligence technology eliminates tedious manual work and helps organizations easily understand key experience drivers and insights buried deep in data. With the power to predict stakeholder experience drivers and model impact, Qualtrics makes it possible to continually deliver ahead of stakeholder expectations.



- Intelligent Text - Open text insights reveal the deepest insights about how stakeholders feel. Qualtrics analyzes open text, automatically suggests relevant topics, and assigns sentiment scores to individual text comments.
- Key Drivers - Knowing which customer experience improvements matter most is hard. That's why Qualtrics automatically prioritizes key experience drivers so you know where to focus your efforts.
- Advanced Statistics - Qualtrics automatically relates dozens of variables and identifies statistically significant relationships so you know which part of your customer journey needs attention.
- Predictive Regression - Automatically run regression analyses and real-time regression modeling so you can understand the impact of your initiatives before you invest time and money.

Prioritize & Predict - Improve research quality with AI

Avoid false starts, improve response rates, and save costs with built-in AI powered quality checks, like ExpertReview.



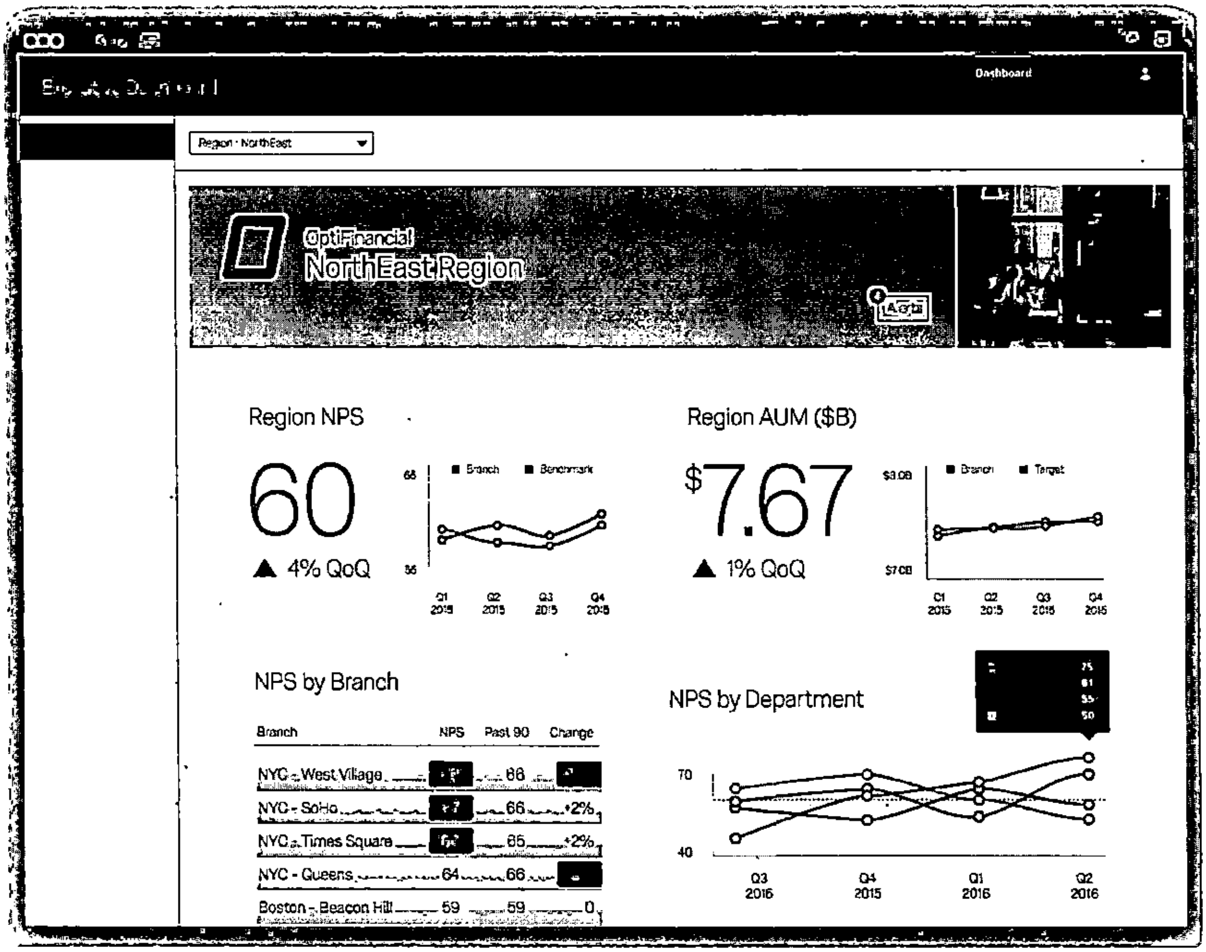
ExpertReview uses AI to detect and remove quality gaps at all steps of the insight's lifecycle. Its features are valuable to survey administrators, survey builders, and survey respondents as it allows you to keep your stakeholders' data secure and protect your organization from collecting sensitive information that you do not want in your system. ExpertReview helps you:

- Avoid painful and costly errors that come from poorly designed studies.
- Automatically flag problems like broken question logic, methodology errors, mobile compatibility and even compliance issues
- Detect any sensitive or PII data, or poor-quality responses coming from bots, duplicates, cheaters, gibberish, and other forms of disengaged respondents
- Detect, delete, and redact poor quality responses with a single click.

Ultimately, DesignXM helps you increase both the quantity and quality of the data you receive thereby improving the quality and speed of your insights.

Act & Optimize

Qualtrics is designed to drive action for your entire organization. Qualtrics makes it easy to know which parts of your stakeholder journey need attention, prioritize strategic action, share relevant dashboards across the organization, and close the loop on every customer interaction.



- Share role-based dashboards, set improvement goals at every level of the organization and visualize performance and trend vs. target.
- Automated actions and notifications whenever there is a detractor. Make sure negative experiences are followed up on with closed-loop ticketing.

Qualtrics closed-loop ticketing lets you follow up on every customer interaction so nothing falls through the cracks.

Evolve & Adapt

Qualtrics provides the ability to quickly, effectively, and accurately collect the engagement data you need to in order to respond to your stakeholders' changing needs on a planned or ad-hoc basis. Qualtrics lets FCPS accomplish this by providing out-of-the-box panel (i.e., stakeholder, contact, and/or audience) management capabilities. Outcomes with effective panel management include:

- **Higher ROI**
  - Identify new growth opportunities or key areas to invest in
- **Improved Quality of Insights**
  - Hit metrics like churn reduction faster
  - Execute the right strategies to improve service satisfaction
- **Improved Productivity**
  - Speed to Insights (Faster, Cheaper, Better)
  - Getting to more insights with less effort

Panel research is a method for collecting data repeatedly, from a pre-recruited set of people. It's more efficient than trying to do a custom recruitment every time you need to collect data, because these people have already agreed to participate in your research, plus you can build up profiles on each person for better targeting.

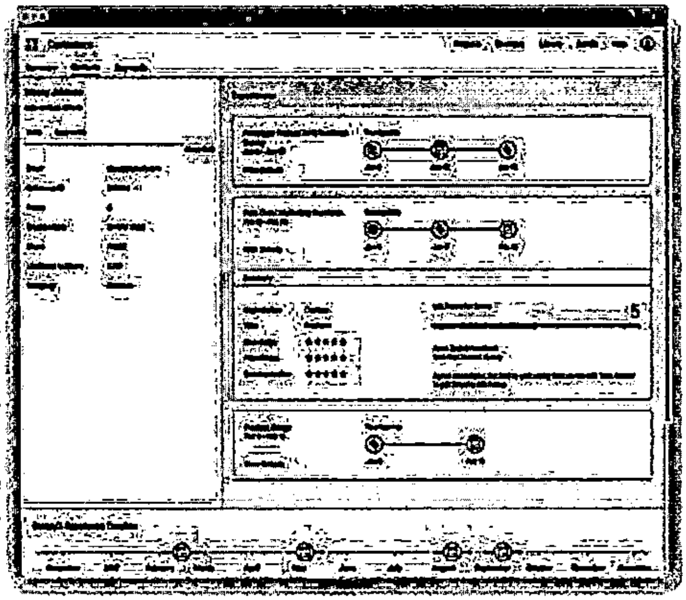
Organizations like FCPS can either build their own panels, or they can leverage panels that others have built. In the former case, the organization would be responsible for recruiting people to their proprietary panel, building up profile data on each person, and ensuring the continued participation of each respondent (i.e., Panel Management). Qualtrics helps to recruit participants and build a panel via multiple ways

- Email list: Qualtrics integrates with your existing CRM systems or other databases to help build a panel
- Website intercept: Add a site intercept on webpages to invite stakeholders, prospects, or visitors to opt into your panel
- Social communications: Include an additional link in your survey section or create a QR code to be used across social media about opting into your panel
- Manual upload: Migrate your existing panel or manually upload data via csv or other file formats
- External sample: Recruit panel respondents, that go beyond your existing reach, via Qualtrics research services. They can help with rigorous checks in sample and response quality as well

With Qualtrics, we help our customers access insights on demand, through a combination of technology and services, to help build panels that provide rich profiles, dynamic segmentation, and personalized targeting, all resulting in higher response rates and lower churn. This ensures organizations can perform agile research projects, focusing on the collection of the right kind of insights, and then driving action based on those insights – leading to speed and efficiency, with a higher business impact with less resources.

Once you a panel has been built, DesignXM helps manage that panel with Qualtrics XM Directory (XMD). XMD is a key tool that serves as a single system of record for all your experience data and puts the individual at the center. Managing the panel involves a series of steps and XMD can help with every aspect of the journey.

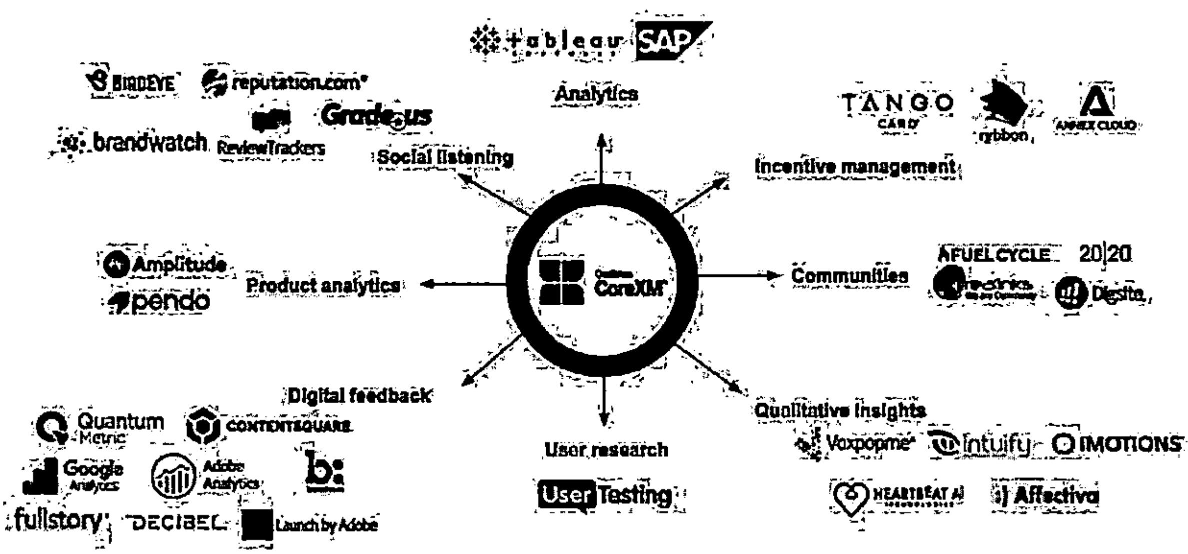
- Create rich profiles of your audience by combining experience and operational data
- Create customized and dynamic segments for your panels based on any field captured in XMD without having to add manually contacts



- Dictate how often a stakeholder receives communication in a certain time period, preventing over-contacting
- Capture every touchpoint for a richer view of interaction. This helps run smarter research by targeting the right audience for trusted insights
- Enable your panelists to provide feedback in ways that work best for them across multiple channels.
- Create more engaged panelists by offering built-in incentives.
- Actively monitor the health of the panel via a dashboard to manage opt-outs, live surveys, and panelists

With built and managed panels, it becomes easy to setup and conduct research projects. Qualtrics DesignXM is a platform, meaning it centralizes all your research, insights, and analytics in a single tool.

Integrates with the way you work



- Research takes many forms. From general market research to tracking and measurement studies to user research, you can do it all with DesignXM
- Qualtrics also integrates well with all of the different systems that you already use for incentive management, quantitative insights, community management, and more.

The Enabling Technical and Functional Capabilities

The aforementioned business capabilities of our proposed solution are enabled by the technical and functional capabilities of the native capabilities of the Qualtrics Core XM platform on which the products have been built. These functionalities include:

- *Survey Creation & Design*
- *Survey Administration*
- *Panel Management*
- *Accessibility Tools*
- *Collaboration*
- *Multi-language Administration*
- *Technical and Business Integrations*
- *Data Import and Export*
- *Data Analytics and Reporting*
- *Scalability*

All of these capabilities are built, deployed, and managed on a globally distributed IT infrastructure whose security has been certified against multiple region-specific and global security standards. These security standards include, but not exclusively:

- *FedRAMP Moderate (only applicable to dedicated FedRAMP environment)*
- *SSAE18*
- *ISO 27001/17/18*
- *ISO 9001*
- *SOC 2 Type 2*
- *HITRUST*
- *NIST 800-53*
- *HIPAA*
- *GDPR*

Qualtrics continues to maintain and develop our rigorous and certified security posture and data management practices so that you and all of our clients have the confidence to safely and securely collect and analyze the data you need for your desired outcomes. The following subsections will provide a high level overview of the technical, functional, and business capabilities, including the security features, of the Qualtrics solution as listed above.

Survey Creation & Design

Drag and Drop Survey Creation

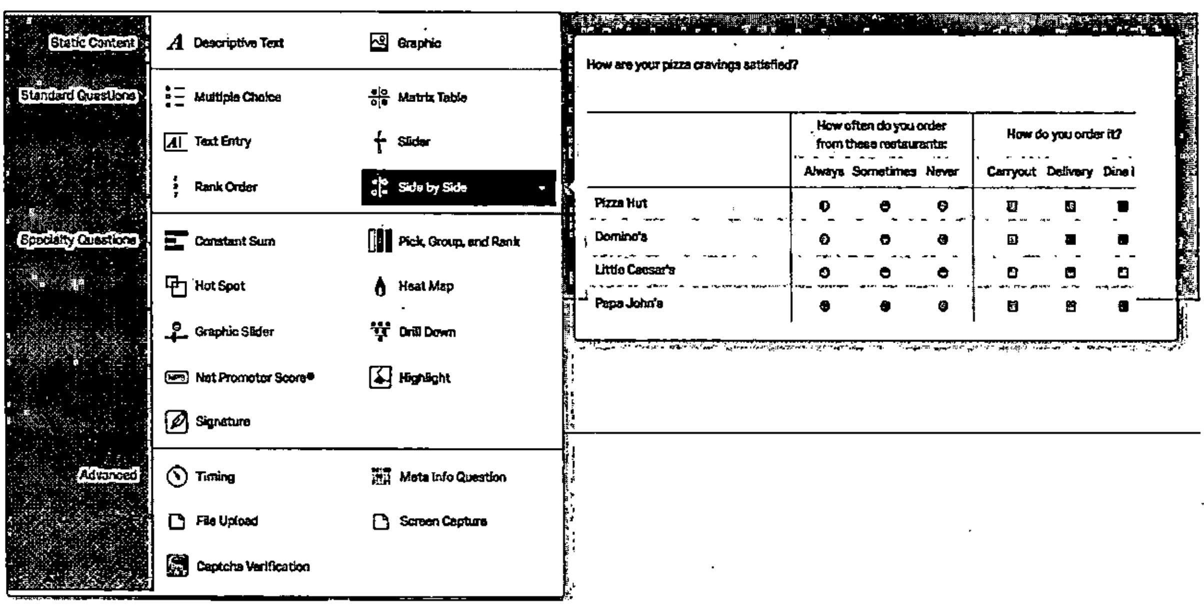
Qualtrics UI is considered to be "industry best" and easy-to-use, with drag-and-drop question, block, and workflow arrangement, as well as user tutorial/recommendation notifications based on survey type, user expertise, and use case. For more details, please visit: https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/#Opening

Creating surveys, questions, and flows is incredibly easy with Qualtrics. There are multiple ways to start a project in Qualtrics: From scratch or with predesigned templates and programs. From here, questions can be added, deleted, moved and modified through a simple point-and-click interface with an easy-to-use question design menu.

The survey engine is smart and able to predict what users are trying to do as they do it. For instance, using tab or enter automatically jumps to the next part of question design, or creates a new answer field, depending on the question type. Additionally, as users create questions, it predicts what they are trying to do. When a user is designing a multiple-choice question and types "Yes," the next option can automatically populate with no, assuming the Yes/No question type. If the survey designer doesn't predict correctly, users can quickly correct course without dealing with troublesome menus.

Users can easily and quickly import questions from other FCPS surveys through the Qualtrics question library. Admins can govern the library and ensure that FCPS survey designers have access to properly branded, formatted questions and survey templates.

Qualtrics offers over 100 different interactive question types including card sorting, drag and drop ranking, dragable sliders, sliding bars, sliding scales, star ratings, heat map, and hot spot question types. Multiple choice questions also feature the ability to use images as the choices and to add in 'other' text boxes and 'N/A' options.



Qualtrics also offers select boxes, multi-select boxes, and dropdown options. Qualtrics can categorize choices into groups for easier selection. We offer more than a dozen varieties of matrix table question types. Users also have access to a full array of matrix table question types, including specific properties that they can set at the question level.

Other properties included going from a Likert to Bipolar scale with a single click. Multiple types of text entry are available, including single line, multi-line, essay, password, and form. Users can set individual properties in each text box when using the form field option. Resizing text boxes is available on the user interface, using simple mouse dragging. Constant sums allow users to choose to show a total to respondents, or have it hidden. Users can also use images as the responses to be ranked. Qualtrics features a pick, group, and rank question type that allows responses to be categorized, and then ranked within categories. Drill down question allows the use of a .csv file to upload fields corresponding to each level.

Questions available in side-by-side include open end, single, multi, dropdown, and scale. MaxDiff matrix tables are available out of the box with Qualtrics. Qualtrics has out of the box heat map and hot spot questions, allowing for both random pinpointing on images, and for designating specific regions within an image. Stars are also available, out of the box.

Survey Termination Options

FCPS will have the ability to customize end pages by utilizing the following end of survey options (note that you can select only one message or redirect option):

- **Default end of survey message:** Display the generic thank you message ("We thank you for your time spent taking this survey. Your response has been recorded.") to respondents when they finish the survey.
- **Custom end of survey message:** Display a custom message to respondents when they finish the survey.
- **Redirect to single response report:** Display a generic report showing the respondent their answers. This gives respondents the option to download the individual response as a PDF.
- **Redirect to a URL:** Automatically send the respondent to another website upon completion of the survey.

The following, in addition to the previous options, are also available to help you customize the end page(s) of a survey and subsequent workflows (FCPS can select as many of these as necessary):

- **Send additional thank you email from the library:** For contact list respondents, choose a custom thank you email to automatically be sent to them at the end of the survey.
- **Do not increment quota counts:** Ignore these responses when tallying quotas.
- **Show Response Summary:** Upon full survey completion, show the respondents a survey overview with their answers selected. This gives respondents the option to download the individual response as a PDF. When this option is enabled, you can also enable show response summary before completing the survey, which allows a respondent to see their answers before submitting them and then go back to change them if the back button is enabled.
- **Do NOT record any personal information and remove panel association (not recommended):** Permanently scrub the response of identifying information (such as IP address or any associated contact list information) before saving it in the results. This option is helpful if you need to send your survey to a contact list so that you know who is participating, but you also need to keep individual responses anonymous.

- **Flag Response As:** Flag responses as Screened or QuotaMet for the 'Q_TerminateFlag' embedded data field. You must add the embedded data field 'Q_TerminateFlag' to your Survey Flow for this column to appear in your downloaded dataset or report.
- **Do NOT record survey response (not recommended):** Do not save responses from respondents who exit the survey at this point. This option also automatically enables do not increment quota counts and flag response as screened-out. This is useful if you are screening the respondent out of the survey and don't want to collect a response.
- **Screen-out Response:** Label and tally responses exiting the survey at this point without having to collect those responses.

Survey Administration

Distribution Channels

FCPS has the following distribution channels available to administer surveys:

- **Email:** We can use the Qualtrics mailer to email Survey Links to a distribution list. The links can appear from any email address, and each link will be unique to every stakeholder, meaning we can house their demographic information (such as gender, tenure, etc.) and attach it to their survey responses without having to ask them on the survey
- QR Codes: This option will be similar to kiosk option, but enable stakeholders to participate via their mobile device. QR Codes can be scanned with mobile devices to pull up the survey. They will then go through the survey process.
- SMS: Qualtrics SMS distributions help you reach your audience through mobile devices and collect on-the-go pocket feedback. You can distribute surveys in two different ways through SMS: as a "2-way," interactive survey where respondents text their replies to each question, or as a link to the survey sent to the respondent's phone that can be opened in a mobile browser.

DesignXM provides easy to understand, insightful results that will drive action through the following capabilities:

- **Timely access to the results:** Enabling stakeholders to access the results as soon as the survey is closed so they can start working on action planning and leveraging the momentum created by the survey This is a critical component to ensuring real change occurs in an organization and that employees see the value and impact of the feedback they provide.
- **Tailored view of the results:** Ensuring stakeholders have access to the relevant and important results is critical to ensuring they are able to identify the right actions to take and don't get lost in a forest of data.
- **Flexible filtering with anonymity protection for respondents:** While the ability to drill in to specific teams and/or compare results between different demographics is critical to ensuring improvement opportunities are not missed or lost in the aggregate views, there is a need to ensure that the anonymity of participants is protected. As a result, Qualtrics includes the ability to set anonymity threshold which will suppress results when there are not enough responses for selected filters/demographic groups.
- **Action planning and tracking:** While engagement surveys are an excellent mechanism for identifying what an organization/team is doing well at and/or needs to improve on, the effectiveness of the exercise can only be achieved if action plans are put in place and executed on. There are many systems and tools that organizations can use to track action plans, but Qualtrics has found the most effective approach is to integrate the action plans in the survey dashboards. This allows managers/stakeholders to create the action plans directly during the analysis and link them to specific items/drivers. They are also able to track progress and easily refer back to the results. It also provides the organization with a centralized system/location to track plans.

Anonymize Responses

Qualtrics provides FCPS the ability to protect the anonymity of your participants by providing the ability to issue anonymous surveys and targeted surveys that can be anonymize to remove identifiable information.

- **Anonymous Surveys:** The anonymous link is a basic hyperlink used to take a survey. You can distribute this link by pasting it into an email, onto a website, or on in-page pop-ups. Anyone who clicks on the link will be able to take the survey. The Anonymous Link has several key characteristics:

- No identifying information such as name or email address is collected unless you specifically ask for it in the survey.
- By default, progress will be saved as respondents take the survey so they can close the window and return to that same computer at a later date.
- By default, there is no limit to how many times a respondent can use the anonymous link. To prevent multiple responses from the same respondent, we have different methods for reducing the risk of this, such as preventing multiple submissions based on IP address.
- By default, whenever a survey is active, the anonymous link is available for use if you have the link. If desired though, this can be disabled by selecting by invitation only in survey options.

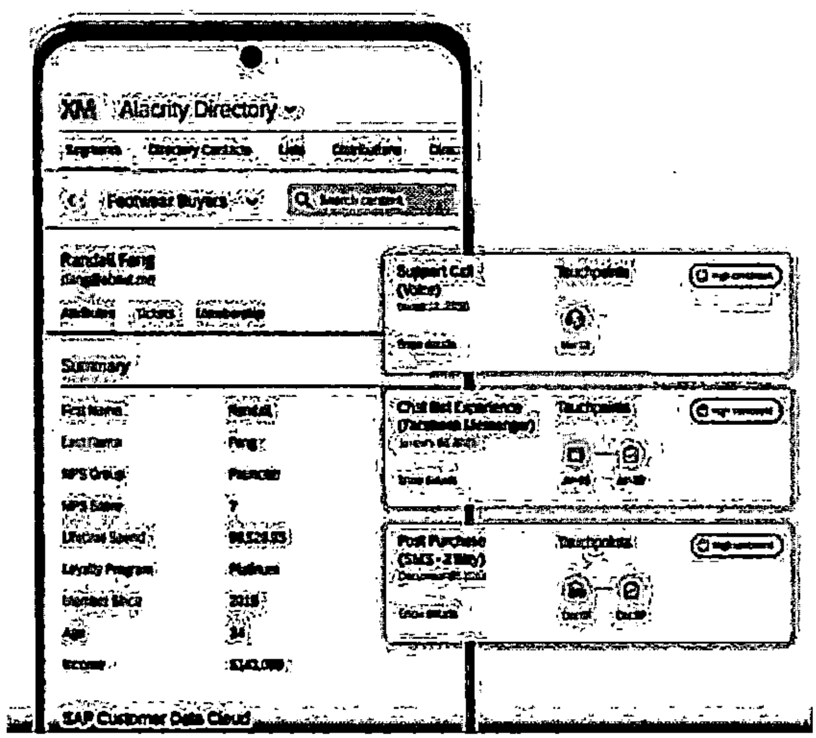
- Anonymize Targeted Surveys: Furthermore, FCPS can leverage termination / end-of-survey options that can be used to scrub personal information and remove panel association from targeted survey distributions. These termination options include:
  - Do NOT record any personal information and remove panel association: Permanently scrub the response of identifying information (such as IP address or any associated contact list information) before saving it in the results. This option is helpful if you need to send your survey to a contact list so that you know who is participating, but you also need to keep individual responses anonymous.

Panel Management

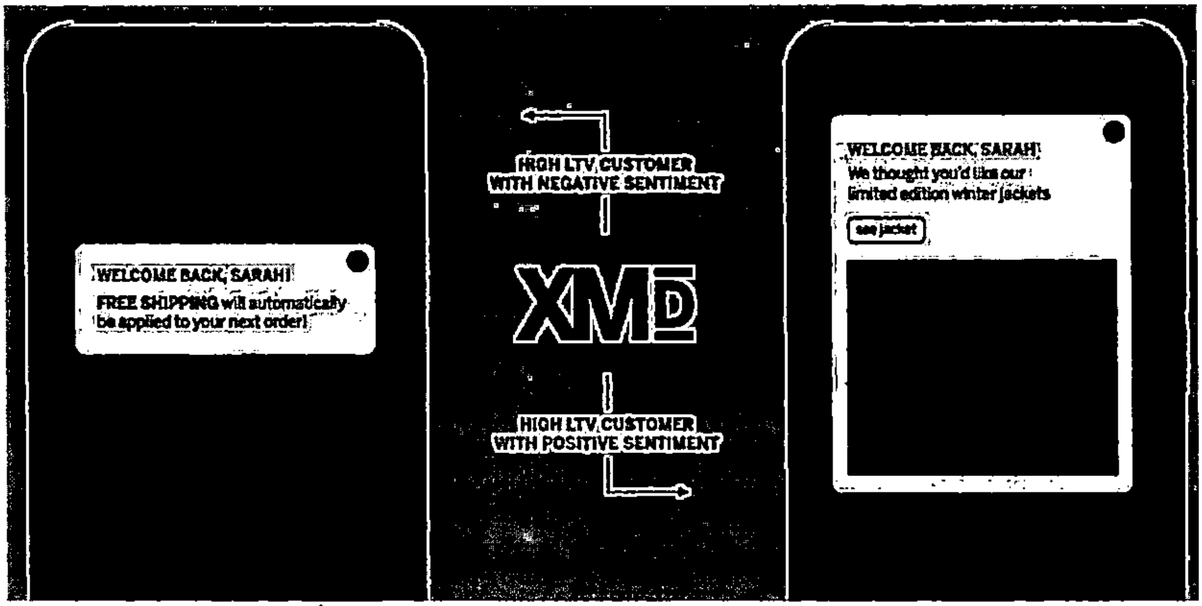
XM Directory is a panel (i.e., contact) management platform that allows FCPS to build and manage a single directory of all your organization's respondents – keeping information up to date, accurate, and accessible to all your users. With XM Directory, FCPS can create and update contact information in one central database and send surveys directly to mailing lists. FCPS can decrease the number of duplicate contacts easily to prevent repeat uploads, and manage your global opt-outs from the directory. You can also limit the amount of times a respondent can be contacted by your brand to prevent response fatigue and improve the survey-taking experience.

XM Directory eliminates data silos and gives you a singular view of your customers across the entire organization, and insight into their personalized experiences and journeys, and prescriptive actions that drive loyalty and satisfaction. Ultimately, XM Directory helps clients to:

- Automatically build rich profiles of customers, pairing all their feedback with data from your other integral business systems
- Track customer interactions over time and connect online and offline journeys
- Manage millions of customers and easily group them into detailed customer segments
- Leverage xFlow to automate data uploads and deliver personalized communications and offers
- Identify the moments where you need to act to keep high-value customers satisfied and coming back
- Drive personalized experiences at scale

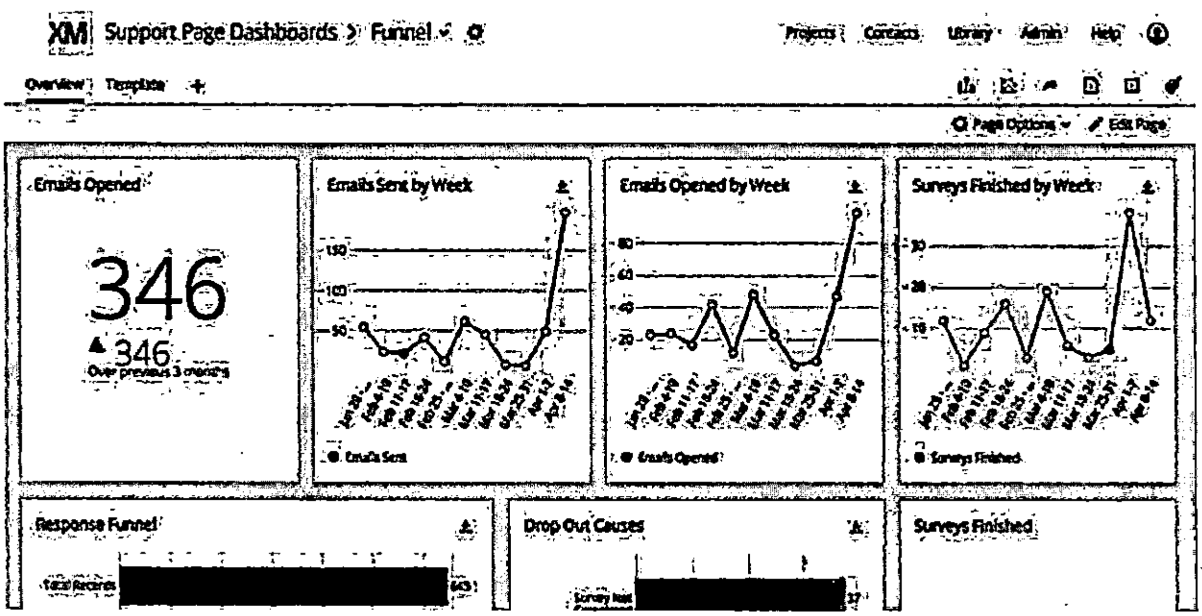


Remember Every Detail. XM Directory remembers every interaction with stakeholders and combines with data from across the organization, including third-party systems like CRM, marketing automation tools, ticketing software, and more. The result? A detailed picture of every stakeholder, so you can see exactly what they need — both now and in the future.



Personalize Experiences Automatically. Contact customers on the channels they prefer, deliver the rewards you know they want, and upsell the products and services you know they need. Because XM Directory plugs directly into xFlow — our workflow automation engine — you'll be able to do it all effortlessly.

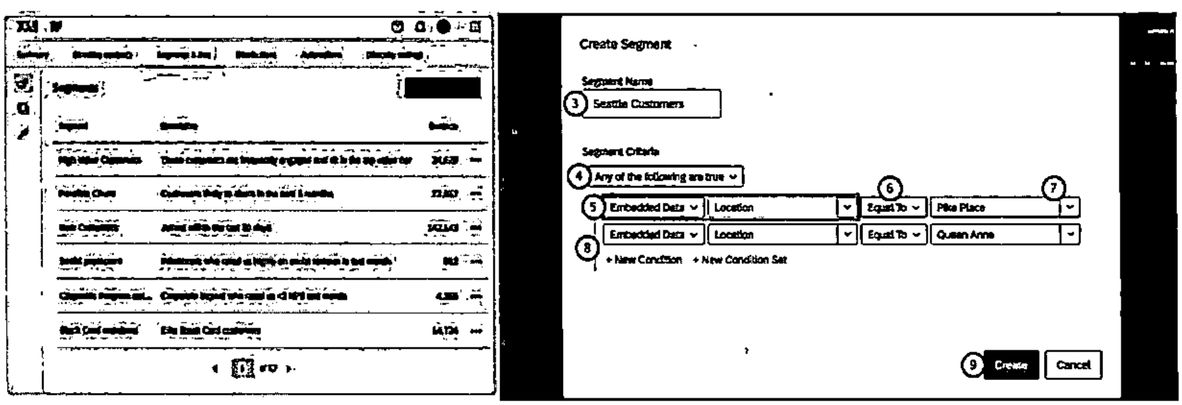
XM Directory users can visualize program metrics such as email open rate and survey response rate with the use of the Respondent Funnel. The Respondent Funnel allows XM Directory distribution and contact metrics, transactional data, Embedded Data, and even contact import automation failures to be uploaded into Dashboards for transparency with all your key stakeholders.



View Data in Your CX Dashboard. Customize the Respondent Funnel to see the metrics you want in your Dashboard.

Contact Segmentation: To divide the contacts in your XM Directory into different groups, the solution provides Segmentation, allowing you to divide your contacts based on demographics, needs, priorities, common interests, and other psychographic or behavioral criteria. XM Directory allows you to easily define segments based on these attributes.

As segments are created, you and other directory managers will be able to see them in the Segments tab of the directory. Once a segment is created, all contacts in your directory that meet the conditions will be added to the segment. Segments are refreshed every 24 hours so that as new contacts are added to the directory that meets the criteria, or contacts are updated so they no longer meet criteria, segments are updated accordingly. You can also manually rebuild the segment. To create segments, simply go to the **Segments** tab of your directory.



Take control of your data. All your data from around the organization comes together in a single place, for one view of everything that's happening across the business.

Once you've created segments in XM Directory, they can be used across Qualtrics in many of the same places that mailing lists and samples can. However, the benefit of Segments is that the group of contacts is more dynamic in nature because contacts can be added and removed based on changes in their attributes. You can then distribute surveys through email or SMS to segments. To learn more about XM Directory Segments, please see the following link: https://www.qualtrics.com/support/iq-directory/segments-tab/.

XM Directory and Role-based Access Controls: Role-based access control with XM Directory Test includes multiple directories to give access to some directories for certain users and different directories for other users. With this feature, Brand Administrators can choose which specific users have access to which directories as well as grant certain users Admin permissions over specific directories. For more information on platform vs. role-based permissions, visit https://www.qualtrics.com/support/iq-directory/directory-settings-tab/xm-directory-roles/#Permissions

Before you can use this feature, your brand must have the **Manage Directory Roles** permission enabled. To have this permission enabled, please contact your Customer Success Representative. You must also have this permission enabled on a user level to enable and configure roles. Once you have the necessary permissions in place, you can enable directories to use roles and then create directory roles. After you create your role, you can change the role privileges and which users are in the role at any time. You can also rename your role or delete the role entirely if needed.

Accessibility Tools

Qualtrics is committed to building accessible products and solutions. Our products are guided by Web Content Accessibility Guidelines (WCAG), included in US Section 508, and the harmonized EN 301 549. All disciplines in our product team go through accessibility training in order to build with eye for accessibility, with the goal of building products that meet, or exceed, accessibility standards.

To help meet our goal of universal design, our development team meets standards given by Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA to ensure our technical services are accessible to the highest standard possible. To aid in this, software developers and UX designers at Qualtrics use the WCAG guidelines that help codify many of the most important accessibility concerns and standard practices needed to make a web application accessible. The WCAG guidelines are oriented around the guiding principles of making web interfaces Perceivable, Operable, Understandable, and Robust (POUR).

To support our accessibility efforts and describe the accessibility features of our products, Qualtrics provides certified Voluntary Product Accessibility Templates (VPAT). We currently offer the following VPATs for download

- Survey taking
- Survey taking simple layout
- Website Feedback
- CoreXM
- EmployeeXM
- CustomerXM

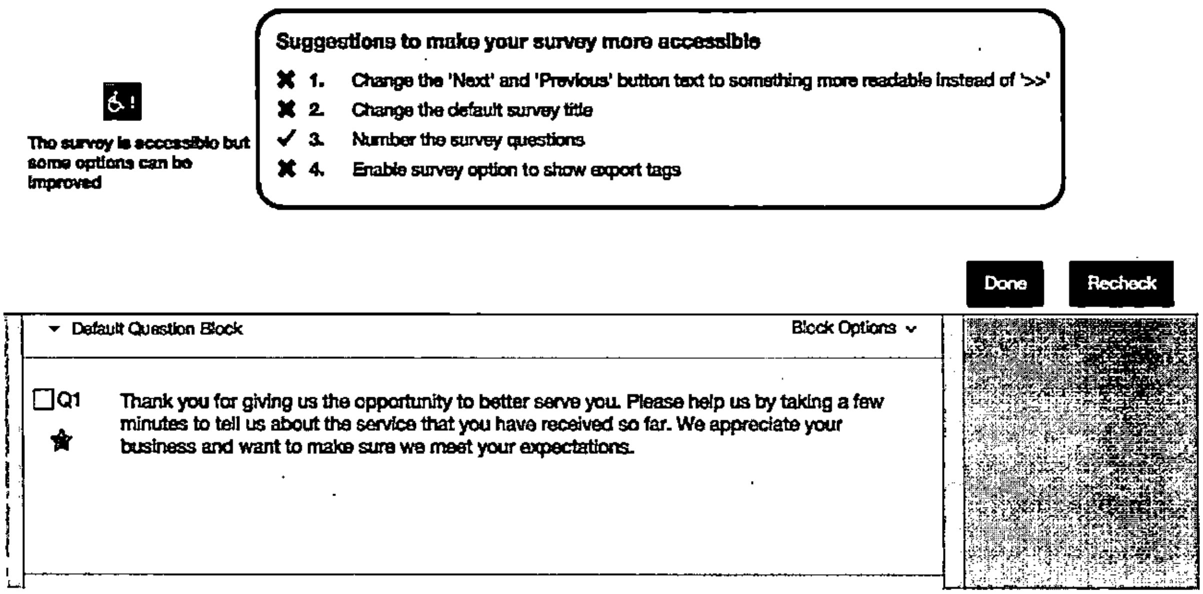
Every feature that has been certified with VPAT has been tested with people with disabilities. We use SAP to certify our VPATs. In addition, we also run user research studies with people with disabilities for core parts of the product.

Survey Accessibility: The Qualtrics platform is fundamentally a self-service platform. FCPS can determine the design of your surveys, including which question types are used and other configurations. Certain question types and layouts provided by Qualtrics are accessibility compatible. To assist you in meeting accessibility requirements for your experience management program, we provide the following tools within the Qualtrics solution:

- Check Survey Accessibility — diagnoses your survey, indicates which questions are inaccessible and gives other recommendations for increased accessibility
- Website app feedback accessibility — guidance on accessible design to reach out to your website visitors
- ExpertReview — indicates if one or more questions in your survey are not WCAG compliant

Check Survey Accessibility

When you have respondents who use third-party screen readers (e.g., JAWS) and you need to meet accessibility standards, it's important to make sure your survey is as accessible as possible. Our Check Survey Accessibility feature diagnoses your survey, indicates which questions are inaccessible, and gives other recommendations for increased accessibility to help you work towards WCAG 2.0 AA (and Section 508) compliant surveys.



Ensure Surveys are 508 Compatible.

Not every question is accessible to screen-reading programs. Below lists which question types are accessible and not accessible:

Accessible *Meet WCAG 2.0 AA compliance*	*Not Accessible* *Do not meet WCAG 2.0 AA compliance and flagged*
• *Descriptive text* • *Multiple choice (all types)* • *Net promoter score* • *Matrix (only rank order, constant sum, text entry, profile, and likert with carousel view enabled)* • *Text entry (all types)* • *Rank order (only text box, graphic, and radio buttons)* • *Side by side* • *Constant Sum (only choices, aka text entry)* • *Drill down* • *Timing* • *Meta info* • *Captcha verification (V2)* • *File upload* • *Slider*	• *Matrix (likert, bipolar, and MaxDiff, as well as any matrix table that is drag and drop)* • *Slider* • *Rank order (drag and drop and select box)* • *Constant sum (sliders and bars)* • *Pick, group, and rank* • *Hot spot* • *Heat map* • *Graphic slider* • *Signature* • *Highlight* • *Org hierarchy (EX)*

Furthermore, the check survey accessibility tool will look for these issues and flag them if it detects them:

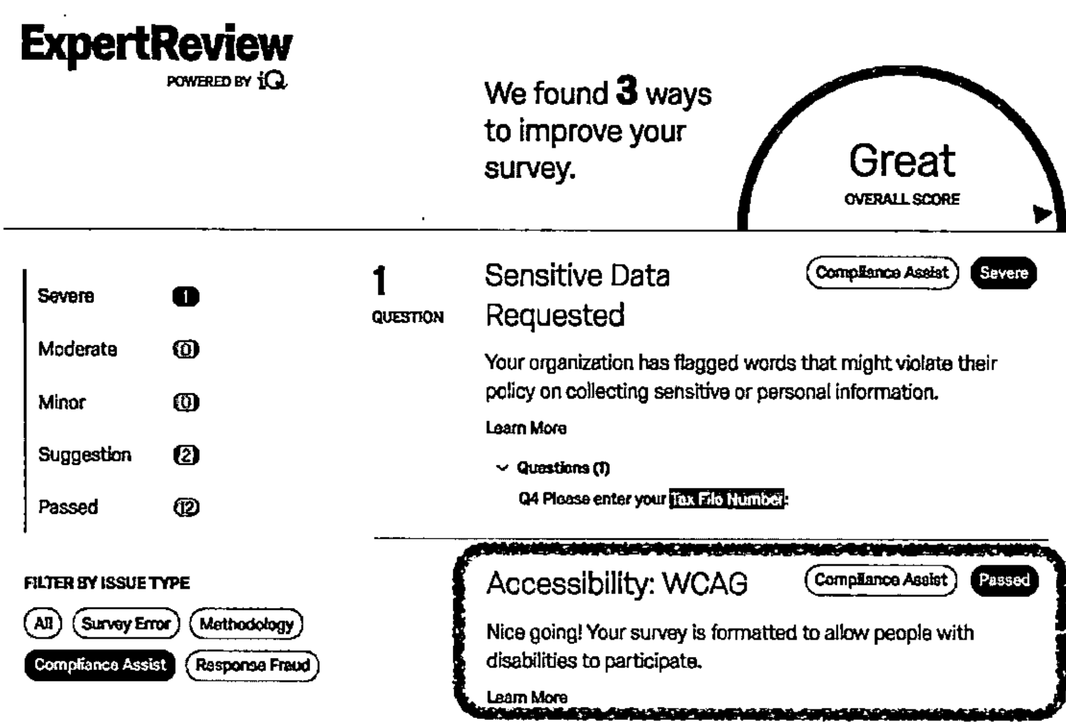
- Number your survey questions using the auto-number feature and show them to your respondents. The survey accessibility checker calls this suggestion "Enable survey option to show export tags," since "export tags" is another term for "question numbers."
- Change the default survey navigation buttons to something more readable than '>>'. The default navigation button text is ">>" and "<<", but words like "next" and "back" are better because screen readers can read them out loud to visually impaired respondents.
- Change the default display name, which is the text that displays on the browser tab for survey respondents.

ExpertReview

ExpertReview is a feature in the Qualtrics platform that checks the overall quality of your survey before you distribute it. It makes suggestions as to how best to improve your survey, including flagging issues with or improving on accessibility, to ensure that you are collecting the highest quality data possible. Powered by iQ, it helps boost response rates and ensure every survey delivers the highest-quality data by monitoring your survey in real-time and offering recommendations to improve the quality of the overall survey and individual questions. ExpertReview has 3 major functions:

1. Measuring the data quality of the survey elements (questions, logic, quotas, etc.).
2. Recommending how users should improve those elements and providing documentation for research-based explanations on these recommendations.
3. Predicting the quality of the data that will be collected.

Regarding accessibility, ExpertReview indicates if one or more questions in your survey are not WCAG AA/508 accessible. Making your survey accessible ensures that many different demographics of respondents are able to access and complete your survey. Inaccessible surveys could unintentionally exclude potential respondents.



ExpertReview helps you identify accessibility issues (or lack thereof).

Accessibility Best Practices and Other Considerations

In addition to being careful about survey question types, there are a few other best practices to consider for accessible surveys:

- Make sure your survey follows all accessible theming guidelines.
- Add alt-text to all images. Screen readers can read alt-text out loud to visually impaired respondents.
- Choose accessible survey questions. Not all survey questions are accessible question types.
- Always double-check the contrast, color schemes, and font size in your rich content editor or Look and feel when taking color-blind and other visually impaired respondents into account. For example, red font on a green background would be unreadable to respondents with red-green colorblindness, and a light gray text on a white background can be difficult for other visually-impaired respondents to detect without a screen-reader. Make sure the colors of your theme create contrast between the font and the background, and that your font size isn't too small.
- If you are adding validation to a question, including request response and force response, then you should indicate that the question has special requirements in the question text. For example, if you've enabled force response on a question, add "this question is required" to the question text.
- Take care when copying/pasting text from other sources because copied HTML can cause issues with screen readers. If HTML issues arise, try strip formatting.
- Do not include labels in any of your question types, as these will not be visible to screen readers. Labels in NPS questions ("Not at all likely" and "Extremely likely") are not visible to any screen readers so as not to bias respondents.

Accessible Survey Themes: To ensure an accessible theme, FCPS can have Qualtrics or another services partner create a theme for your consumption. Alternatively, you can use a theme from the Qualtrics library. These themes will be available for you to choose in the Look and feel menu of your survey. Any accessibility issues with your theme should be forwarded to the themes team through your Brand Administrator.

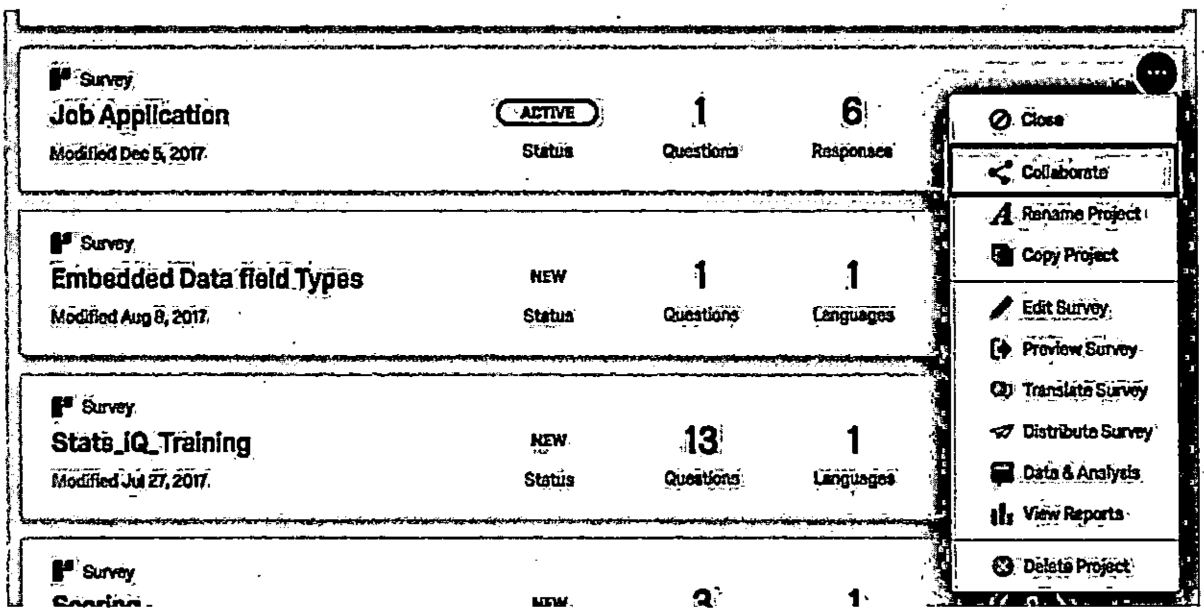
Requiring Accessible Surveys: Most organizations in Qualtrics (i.e., Customer instances) are set up to allow survey builders to create non-accessible surveys. An Allow Non-Accessible Surveys permission is enabled by default, but a FCPS Brand Administrator can disable it, forcing every survey to be accessible before it can be distributed. If this permission is disabled for your account, then you may see a red banner above your survey that reads, "This survey does not meet web accessibility standards."

If a FCPS user attempts to publish, activate, or distribute the survey without revising inaccessible features, you may get the message, "This survey has questions that are not accessible for all users. Use the "Check survey accessibility" tool (found in the "Tools" menu of the survey editor), then try activating the survey again." This means the user must make changes to their survey before activation, publication, or distribution.

Collaboration Functionalities

Our collaboration features allow you to give other FCPS users access to your surveys when they log into their accounts. This way, your users can work on the same project without giving out account information. FCPS can even choose to restrict what type of access other users have to projects. For example, if you have translators working on your project, you can make sure they have editing privileges, but no access to the data you collect.

FCPS users can collaborate on surveys with individual users and groups in your organization. A group is a set of users with access to a shared library of surveys, contacts, and other project data. If users want to create a group, a FCPS Brand Administrator (i.e., Super User) can create one for them.



Collaborating with External and New Users

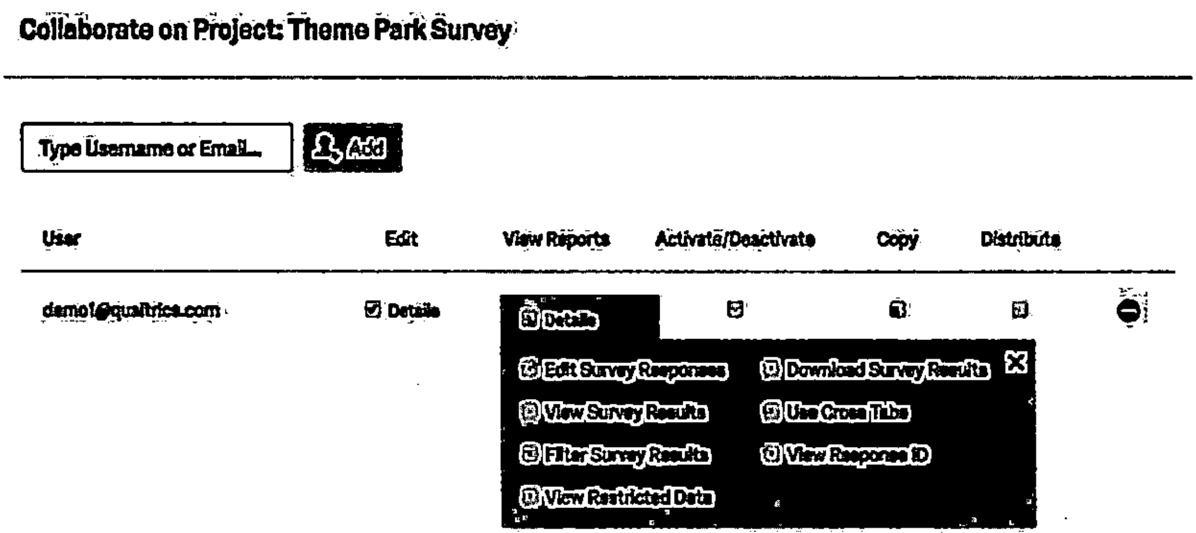
Collaborating with external users works very similarly to collaborating internal users. FCPS users simply enter the email address associated with the user's account. You can also collaborate on a survey with a user who does not already have a Qualtrics account. However, to edit or distribute the survey, the collaborator will need to make a new account.

When collaborating with users outside of your brand (i.e., organization), be careful of the information you are sharing with these users. Sharing a survey outside your organization can give a user access to brand-wide, organizational libraries and their contents. This gives the collaborator access to:

- Brand-Wide Surveys: Any surveys shared with a brand-wide group will be accessible to users outside of your organization with whom you've shared surveys. This applies even if the survey you are sharing outside your organization is not a brand-wide one.
- Brand-Wide Libraries: Any libraries (and contents saved within) that are shared with a brand-wide group will be accessible to users outside of your organization with whom you've shared surveys. This applies even if the survey you are sharing outside your organization is not a brand-wide one.
- Brand-Wide Contacts: Any contact lists shared with a brand-wide group will be accessible to users outside of your organization with whom you've shared surveys. This applies even if the survey you are sharing outside your organization is not a brand-wide one.

Collaboration Permissions

When you collaborate on a project, you don't have to give them full access. You can restrict what content they can view or edit right on the Collaborate on a Project menu. If you ever need to edit these settings, navigate to the Collaborate on Project menu as normal, make your changes, and click Save.



Collaborating with Trial Accounts

Any trial account created after October 4, 2019, can collaborate on surveys. Users without accounts or access to a Qualtrics license can create a free account that is capable of collaborating on projects by either using the link in the email or the free account sign-up on the Qualtrics website. Note that because this account is free, it will still have certain limitations in its access.

Multi-Language Capabilities

The Qualtrics platform supports multiple languages for surveys. We have designed the platform to automatically recognize and load the survey language that corresponds to the default browser language of the survey taker, so long as that language has been selected for translation by the survey creator/administrator. There is also a language selector for the respondent if for any reason the displayed language needs to be adjusted. Our functionality supports more than 70 languages including French, Spanish, Arabic, Chinese, Korean, and more. By default, the dashboards are provided in English with translation to other languages available. Qualtrics can scope dashboard translations for FCPS once we have a more detailed understanding of their content, metrics, and other reporting requirements. In addition to surveys and dashboards, our platform also supports translated email messages (survey invitation, survey reminders, and dashboard invitations). For more information, visit https://support.qualtrics.com/survey-platform/edit-survey/survey-tools/response-management-tools/translate-survey

Additionally, the following support pages dive deeper into the process of translating within various areas of the Qualtrics platform.

- Translating a Survey: On this page, you will learn about the methods available for translating your survey, how to specify which language each respondent sees, and how to analyze data for translated surveys.
- Translating a Reference Survey: This section discusses the specifics of translating reference surveys. Reference surveys allow you to use the same set of questions in multiple surveys via your survey library.
- Translating Comments: This page discusses how to translate comments after collecting open text survey responses.
- Translating Messages: This page shows how to translate template messages of any kind within the messages library. Messages can be used in many different places on the Qualtrics platform, including survey invites, end of survey elements, and email tasks.
- Translating Conjoints and MaxDiffs: This page walks through the process of translating these specific Product Experience (PX) projects. You may learn more about these projects by visiting the support pages for Conjoints and MaxDiffs.
- Translating Feedback Buttons and Response Dialogs: This page describes how to translate these types of creatives within Website/App Feedback.
- Translating Messages (360): This page outlines how to translate messages in 360 Projects in the Employee Experience (EX) product.
- Translating Messages (EX): This page talks about translating messages in the Employee Experience (EX) product.

Technical and Business Integrations

Qualtrics supports multiple methods of integration into other business systems, ultimately allowing us to connect with virtually any modern platform using our open integration architecture.

- **API-based Integrations** – REST API library with hundreds of endpoints to perform nearly every in-product function programmatically
- **Out-of-the-box Integrations** – Pre-built integrators for dozens of the most commonly-used business systems, like Salesforce, Adobe Analytics, and Tableau

API-based Integrations (SOAP/REST)

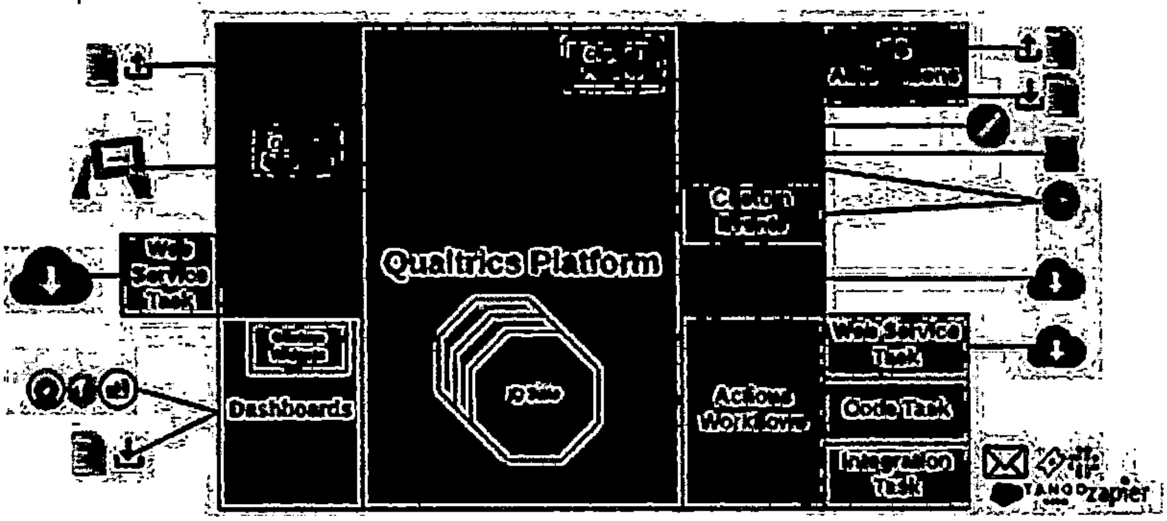
Qualtrics supports both SOAP and REST APIs. Web Service (SOAP) calls can be made from within a survey to access third-party systems to bring in additional data, and occur over HTTPS with multiple format options (e.g. CSV, XML, JSON, SPSS). The Qualtrics REST API enables the automated flow of data between Qualtrics and virtually any other authorized platform. The most common use cases are to pull data stored in Qualtrics into another system, such as FCPS's database, upload files to an SFTP site, add/update contacts, schedule emails/ reminders, trigger surveys, update survey content, export completed survey data, and more. FCPS has the ability to indicate if they want to use PGP encryption as part of the integration process for SFTP-based file transfers. You can find full API documentation for the Qualtrics platform at https://api.qualtrics.com/.

Out-of-the-box Integrations

Qualtrics offers out-of-the-box integrations with a number of specific third-party solutions and is flexible enough to integrate with many more using a combination of the Qualtrics API and Web Service integration capabilities. These tools allow you to get the most out of Qualtrics while seamlessly integrating with your existing systems. The third party integrations Qualtrics offers include:

- **Adobe Analytics:** The Adobe Analytics integration allows you to pass data from a Qualtrics survey to Adobe Analytics and to have named variables in Website / App Feedback (e.g., Page Name instead of Custom eVar).
- **Freshdesk:** The Freshdesk integration allows you to create tickets in Freshdesk based on actions triggered in Qualtrics.
- **Hubspot:** The Hubspot integration allows you to create and update deals and contacts in Hubspot from collected survey responses.
- **Marketo:** The Marketo integration allows you to create unique links in Qualtrics and store them in lead fields in Marketo for distributing to email campaigns.
- **Microsoft Dynamics:** The Microsoft Dynamics integrations allows you link up your account to a Qualtrics survey for both Response Mapping and Web to Lead capabilities.
- **Salesforce:** The Salesforce integration allows for the ability to send out transactional surveys from Salesforce, pass information into Qualtrics, and map data back to Salesforce. Further information on the Salesforce Integration is provided below:
- **ServiceNow:** The ServiceNow integration allows you to create and update incidents in ServiceNow as well as update customer contact information provided by survey responses.
- **Slack:** The Slack integration allows you to send customised slack messages upon survey completion, and also create one question surveys within slack.
- **Tableau:** The Tableau integration allows you to take your Qualtrics data and build powerful visualisations to get the most out of your results.
- **Zapier:** The Zapier integration allows you to create "zaps" in Zapier to connect with thousands of other compatible applications such as Google Sheets, Facebook, Quickbook, MailChimp, and more.

- Zendesk: The Zendesk integration allows you to create and update tickets in Zendesk based on responses collected with Qualtrics surveys. Further information on the Zendesk Integration is provided below.



Potential Integration Points Qualtrics

Qualtrics fully recognizes that our customers almost always have to integrate their systems and data feeds into and out from their Qualtrics platform. The complete ease with which our customers can do this is often a deciding factor in choosing Qualtrics in the first place, and a continuing factor in their satisfaction with and indeed love of the platform as they grow and evolve beyond those initial systems and use cases.

Data Import and Export

The Qualtrics Platform provides the functionalities necessary to import historical data and automate the export of collected survey / response data.

Migration of Historical Data

Qualtrics is a powerful platform that can easily import your historical data such as legacy survey contacts and responses. Survey templates do not import directly, however FCPS can simply replicate them in Qualtrics. Data migration is done by exporting the historical data from the existing survey tools as CSV files and then importing these files in Qualtrics. Once the data migration is completed, historical and new data can be visualized in the same dashboard if desired, allowing for seamless analysis and reporting.

Scanning for Viruses

Anti-malware (anti-virus) software is loaded on the front-end firewall systems. All incoming packets are checked in real-time. Suspected malware is quarantined and prevented from being downloaded to workstations. Definitions are installed automatically.

Limiting Upload of Document Types

The Qualtrics solution prevents upload of file types commonly associated with viruses, e.g. macro enabled documents or executable files. See below for further details. FCPS can restrict the type of file respondents upload. For example, if a question asks for a photo, other file types like documents or spreadsheets, can be blocked. Content options are:

- PDF
- Document (DOC, DOCX, TXT, ODT)
- Spreadsheet (CSV, XLS, XLSX, ODS)
- Graphic (JPG, PNG, GIF)
- Custom - Determine specific extensions and file types to allow or restrict

Automated Exports to FCPS Data Warehouses

FCPS can set up Extract, Transform, and Load (ETL) workflows within Qualtrics to export data on a regular basis to FCPS data warehouse. The Qualtrics Workflows platform contains a series of tasks to assist in importing data from third-party destinations into Qualtrics or exporting data from Qualtrics to third-party destinations. These tasks follow the ETL framework. Using ETL tasks, you can create automated and scheduled workflows to bring data from third-party sources into Qualtrics as well as export data from Qualtrics to third-party destinations. To create an ETL Workflow, you must create one or more extractor tasks and exactly one loader task. If you are looking to load data into multiple destinations, you should create separate workflows for each destination. A complete overview of setting up ETL workflows may be found here.

To enable ETLs, FCPS may use SOAP and RESP APIs. Web Service (SOAP) calls can be made from within a survey to access third-party systems to bring in additional data, and occur over HTTPS with multiple format options (e.g. CSV, XML, JSON, SPSS). The Qualtrics REST API enables the automated flow of data between Qualtrics and virtually any other authorized platform. The most common use cases are to pull data stored in Qualtrics into another system, such as FCPS's database, upload files to an SFTP site, add/update contacts, schedule emails/ reminders, trigger surveys, update survey content, export completed survey data, and more. FCPS has the ability to indicate if they want to use PGP encryption as part of the integration process for SFTP-based file transfers. You can find full API documentation for the Qualtrics platform at https://api.qualtrics.com/.

Data may be exported in the following formats:

- CSV (Comma Separated Values)
- TSV (Tab Separated Values)
- Excel (Microsoft Excel)
- XML (Extensible Markup Language)
- SPSS (Statistical Package for the Social Sciences)
- Google Drive (Direct export to Google Drive)
- Tableau (Extension with Tableau—only available with the Tableau Extension)
- JSON (Javascript Object Notation) & Open Data Protocol (only available with the API Extension)

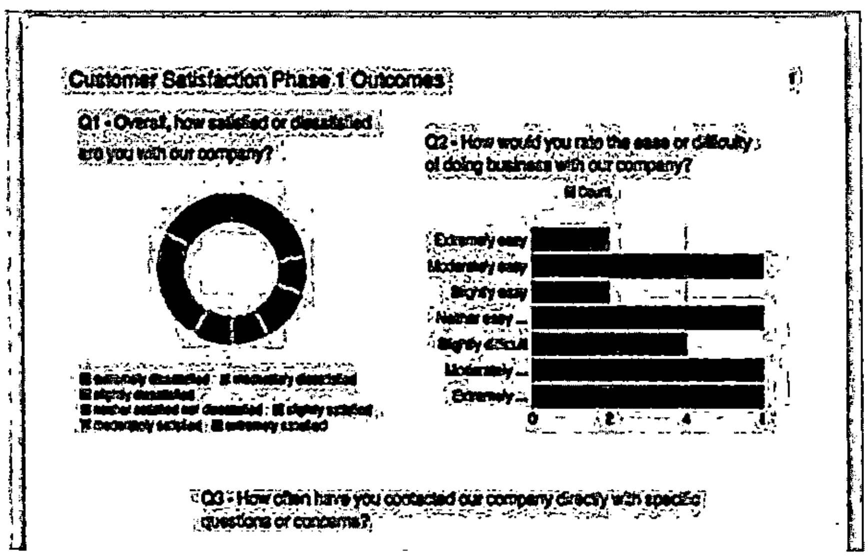
Files submitted by survey respondents may also be exported to external data warehouses. Survey reports may be exported to a PDF, Word, PowerPoint, or CSV document. Dashboard data can be exported or emailed as a PDF, JPG, PNG, or CSV file.

Data Analytics and Reporting

The reporting and role-based dashboarding capabilities within Qualtrics allow FCPS to create detailed data visualizations and configure the level of access for all colleagues and teams involved. This enables you to have access to role-specific views and reports, both for users as well as for digests sent out to key stakeholders.

Results-reports

Results-reports are designed to give you a quick and simple visualization of your survey results. Each question in your survey has a pre-made visualization depending on which type of data it collected, but there are many customization options available to you to help you build a report to fit your needs. These options include creating custom pages where you have full control over the page content; exporting, moving, rearranging, hiding, and deleting pages; and adding visualizations, images, and text. You will also be able to filter data by variables such as survey data, embedded data, and question answers.



Use reports to easily digest survey results.

Role-based Dashboards

Qualtrics provides configurable dashboards—dynamic reporting projects that allows you to create detailed data visualizations and configure the level of access for all colleagues and teams involved. These can include multiple report types within the dashboard portal, allowing you to report on your research with eye-catching visualizations as well as highlight key findings, action insights, invite colleagues to collaborate, and report to stakeholders.

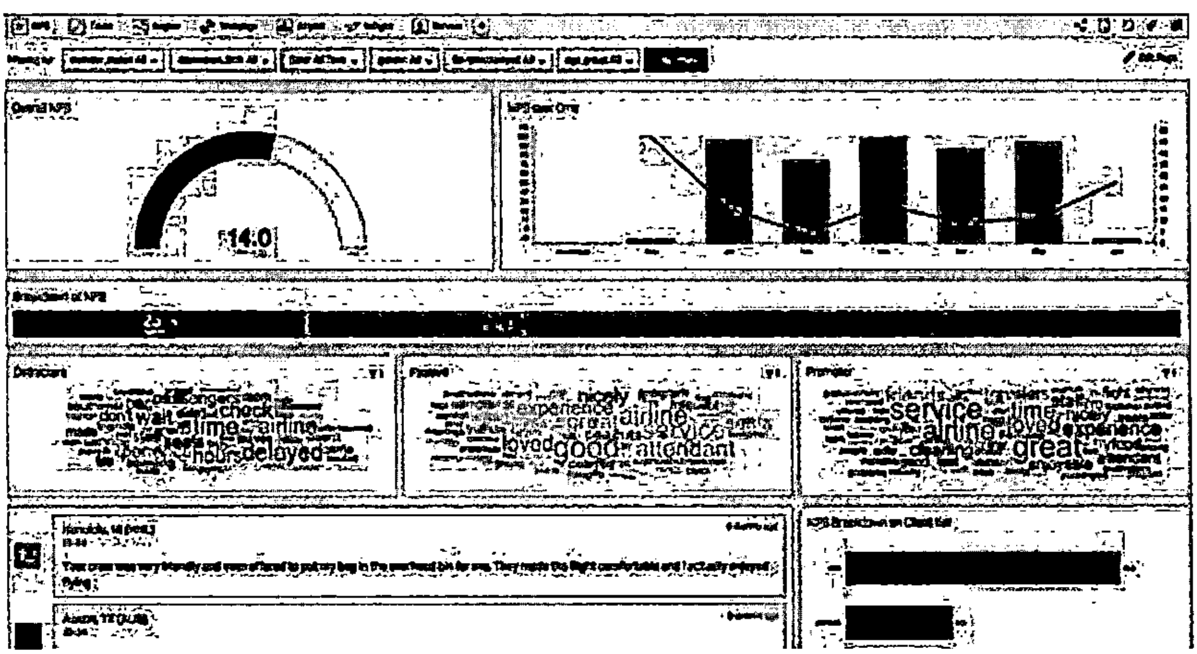
Dashboards pull data sources into charts, tables, and other visualizations called widgets. These widgets can be organized onto pages of the dashboard. From there, you can create unlimited dashboards, unlimited pages, and unlimited widgets for any Dashboards project. FCPS can use various widgets to create different reports to showcase different scores and metrics based on any data, category, filter, level, etc. in its organization. You can filter your dashboards by applying a filter to every widget on a page or by applying filters to individual widgets. This allows you to dive into the data and find trends that you would not be able to see with the data in aggregate alone. Different data types will result in different kinds of filters (e.g., Text Sets will give you a dropdown list of options while Dates will give you a calendar from which to select a date range).

Reports can include the following:

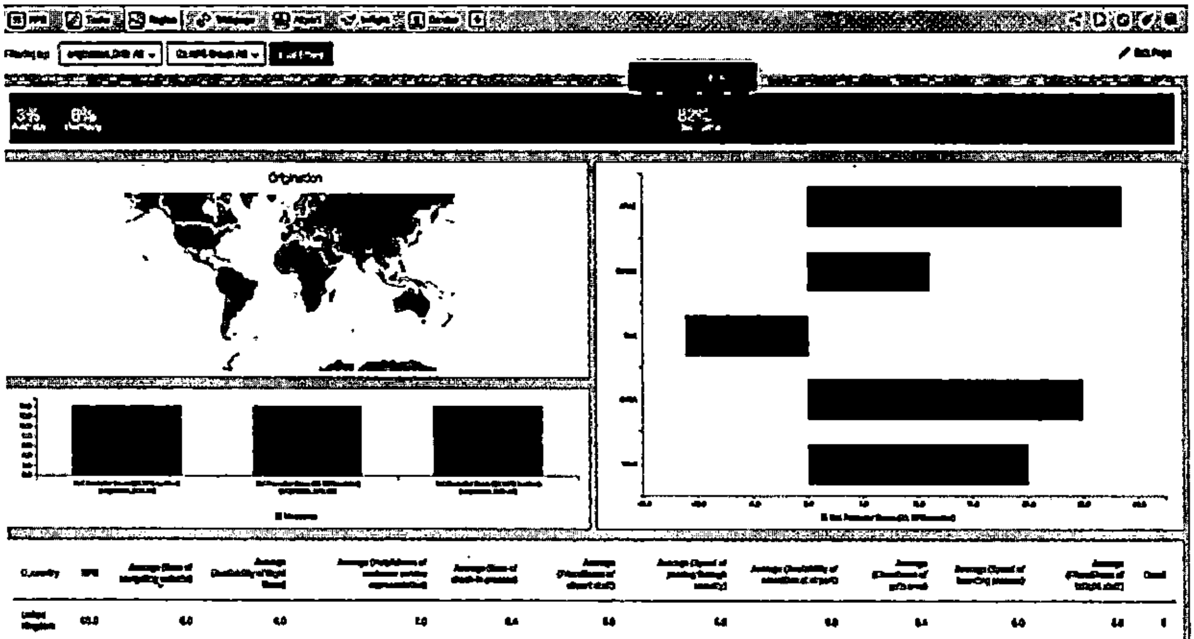
- Benchmarks and comparisons reports
- Trending reports
- Comprehensive question reports
- Individual response reports
- Ranking reports
- Case management modules
- Case management statistics report
- Word cloud and basic text analytics reports
- Social media reports
- Overall summary reports

The Qualtrics solution also allows for changes to the organization hierarchy over time to enable historical trend analysis and reporting within the solution. This is accomplished through the hierarchy management function of the platform, which maps the hierarchies between time one and time two (and any subsequent points in time). Individual local users and administrators can manage portions of the hierarchy for which they have purview, and enterprise-wide administrators can manage the entire hierarchy. Hierarchies can be created based on employee reporting relationships, matrix reporting relationships, or based on departments, divisions, etc.

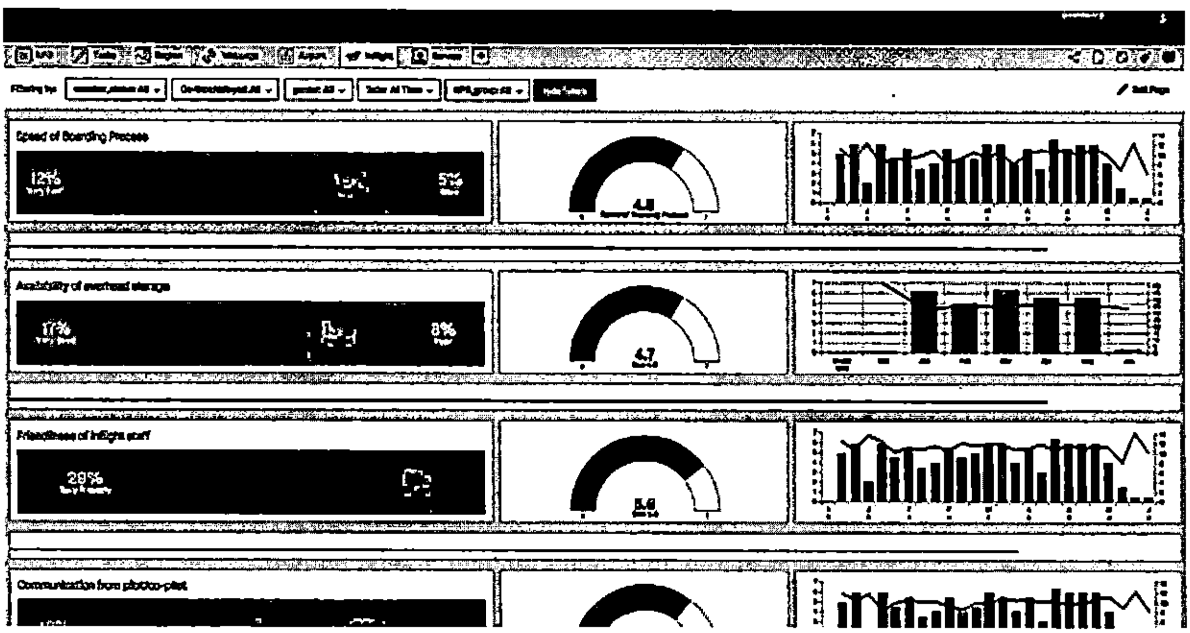
Please see the below examples of real-time industry dashboards for your reference.



Get the Vision Users Need to Increase Customer Satisfaction. Real-time NPS dashboards track NPS scores and highlight hot topics within customer verbatims, differentiated by NPS groups.



Customize Dashboards by Region for Easy, Localized Analysis. Dashboards can be broken down by region for tracking NPS scores and its drivers in different locations and business units, with ability to drill-down on specific regions even further by whatever data FCPS has about passengers.



Evaluate Every Aspect of the Customer Experience. Our dashboards can provide information as it comes in, meaning you can react to customer experiences that are still taking place and resolve issues before customers even realize there is a problem.

Analytics

The Qualtrics platform offers a powerful set of capabilities around real-time reporting and analysis. With all of your data flowing into one platform, you will be able to dive into your data as needed. Our Engagement and Experience dashboards will enable you to drill down by time period, hierarchy, or any other variable or question-answer found in your data set. These dashboards offer rich visualizations. You can share KPIs, relevant comparisons, and scorecards with various stakeholders in real-time. You will be empowered to predefine reports and views and have digest reports sent out on scheduled timelines via email. You will also be able to create ad hoc reports or cross-tabulations as needed.

Key stakeholders and various groups within FCPS at every level will be able to access real-time reporting, analytics, and key insights as needed on a continual basis. Specific data analytics features include the following from our iQ Suite:

- Text iQ uses Artificial Intelligence (AI) to bypass the need to read every customer survey response upfront. Pairing an understanding of quantitative data with customer opinions can help you pinpoint where to focus your analysis. For example, if your pricing study includes numerous comments about warranty cost, Text iQ can mine topics and sentiments can help you quickly identify whether this is a problem area. As you review customer responses, you can easily narrow in on key comments that can lead to actionable insights.
- Stats iQ lets you automatically run correlations, regressions, pivot tables, cluster analysis, and advanced crosstabs. With built-in conjoint analysis, you can optimize product and pricing decisions – without Excel or SPSS training required.
- Driver iQ uses advanced statistical analytics to automatically correlate your data, and highlight the actions that will drive the most business impact. With a few simple clicks, executives, analysts, and frontline managers can identify areas of impact across different portions of customer and employee journeys and invest in those areas that will produce the highest return.

Sharing Reports and Dashboards with Public Facing and/or Non-Licensed Users: Qualtrics enables FCPS to publish public reports, which can be password-protected as needed. These dashboards can be shared via links and are accessible to anyone, with no login needed. Analyses, dashboards, and reporting assets can be exported to PDF, JPG, PNG, or CSV formats and shared with non-licensed users. Non-licensed users do not need to have a Qualtrics account to view the reports.

Sharing Reports and Dashboards with Licensed Users and/or Other: Reporting assets can be shared automatically via the aforementioned method and emailed reports.

- Automatically scheduled report emails for regular updates
- Choose the exact time a report will be sent
- Attach a document to an email (e.g., PDF, tables, and/or images)
- Individual reports for each respondent
- Response summaries of surveys in progress

Scalability

Our solution is designed to scale easily. In a recent quarter, we supported approximately 600,000 active administrative users. On average, 3.5-4.5 million survey responses are collected each week. We have constantly handled spikes in demand (i.e., where a single survey collected one million responses in 24 hours) without incident. Qualtrics approaches high availability, scalability, and performance by architecting highly modular, redundant systems. We have five data centers globally (three in North America) designed for 24/7/365 availability. Qualtrics has redundancy both within and across data centers, which allows our teams to perform upgrades and maintenance without any service disruption to users. The modularity of the architecture allows individual layers to be scaled up based on demand (e.g. we can scale web heads independently from the application or database layer). Qualtrics also builds ahead to provide excess capacity in each data center to accommodate projected growth, spikes, demand, and data center failovers.

Concurrent Users

There is no set number for maximum concurrent users. For perspective, our largest customer has approximately 30,000 users. We also have a customer surveying their employee base of approximately 2.3 million employees. There is no set number of concurrent users, and thus engagement activities. Qualtrics constantly monitors the platform and watches for load and capacity in order stay well ahead of any platform load or capacity concerns.

Platform and Security

Both the hosting environment (i.e., data centers) and application (i.e., platform) are certified against SOC2 Type 2 and ISO27001. The following are the standards against which Qualtrics is certified:

Data Centers:

- SSAE18/SOC 2 Type 2
- ISO27001

Platform:

- FedRAMP Moderate (only applicable to dedicated FedRAMP environment)
- ISO 27001/17/18
- ISO 9001
- SOC 2 Type 2
- HITRUST
- Cyber Essentials
- IRAP - Protected Level Controls

Other:

- NIST 800-53. With NIST 800-53, Qualtrics is committed to achieving one of the highest recognized security accreditations regardless of where the data are stored and processed. As related to the security framework, NIST 800-53 meets or exceeds these standards: ISO 27001/2, HIPAA, Cloud Computing Initiative, and PCI:
- OWASP. Qualtrics adheres to the OWASP ASVS methods for development and code review.
- FIPS. Publication 200, "Minimum Security Requirements for Federal Information and Information Systems," states the basis for sound security practices in any organization. Qualtrics meets all requirements as listed in section 3, such as awareness and training, incident response, media protection, and risk assessment.
- HIPAA. Qualtrics may be designated as a Business Associate (BA) when an agreement is signed with a Covered Entity—an organization that is required to comply with HIPAA privacy rules. Business Associate Agreements will only be considered when the customer's primary business is in the healthcare industry. There is no legal requirement for Qualtrics to sign a BAA.
- GDPR. Qualtrics fully complies with GDPR and has implemented several features that allow users to automate the processing of requests in a matter of seconds without requiring hours of manual deletion.

Qualtrics' security policies and certification documentation can be requested from the Qualtrics Trust Center: www.qualtrics.com/trust-center/. Certain documentation requires an NDA to be released, however LITE versions of documentation are also available.

Data Retention

Qualtrics' data retention policy is such that all data is retained and available to FCPS at any time unless FCPS chooses to delete data. Most Qualtrics customers choose to set up an API to additionally record all data in their own internal data warehouse. Upon termination of a contract, data is retained for 90 days to allow FCPS to export and retrieve all of their data from the Qualtrics platform, and the data will be permanently deleted within six months.

The Brand Administrator has the ability to undelete data. This is important, as a user could accidentally or intentionally delete data. In the same interface, the project data may be undeleted or permanently deleted.

To permanently delete data, the entire project must be deleted. Only the Brand Administrator can permanently delete Data. Once the project is deleted, all information is then unrecoverable.

Formal processes and procedures are in place to securely dispose of devices that may contain Customer Data. These procedures apply to all data center environments. Deprecated or defective media (specifically, hard drives) are erased according to a U.S. Department of Defense compliant 3-pass overwrite standard, and/or physically destroyed.

Data Ownership

All Data is owned and controlled by Qualtrics' Customers, including FCPS, who are designated as data controllers. Qualtrics is the data processor. All Data is stored and processed in a single multi-tenant data center and in a region chosen by the Customer. Data may be transferred and processed outside the data center region to comply with Customer requests or instructed (e.g., support purposes, use of subprocessor services) or as strictly necessary to provide the Cloud Service. In all data centers, Qualtrics solely operates and is responsible for all system and developed software. Qualtrics only processes Data to the extent necessary to provide the software and services and in accordance with our contractual arrangements (i.e., to improve products and services), and does not disclose any Data to third parties other than in accordance with applicable law or any contractual agreements.

Data Backups

Qualtrics conducts nightly data backups and has quick failover points for all services, but are for disaster recovery/business continuity purposes. Since FCPS owns and control your own data, you are responsible for accuracy, quality, integrity, legality, reliability, appropriateness, and intellectual property ownership of your data. FCPS is encouraged to back up your own data on a regular basis (can be done manually or by automating it using the Qualtrics API).

Data at Rest

Disk level encryption is standard for Data stored on the platform. Data at rest uses AES 256-bit encryption. Unique keys are generated per server or data storage volume. Encryption keys are stored within a software vault where they are encrypted with key encrypting keys of equivalent strength. Keys are rotated whenever data storage volumes are rebuilt.

In addition, for full control over your data, we recommend the additional purchase of Data Isolation Encryption (Premium Feature). Data Isolation is application or database level encryption using AES 256-bit cipher. Data Isolation encrypts response data with a data encrypting key (DEK). The DEK is unique per survey. The DEK is encrypted using a Customer specific master key or key encrypting key (KEK). The KEK is stored in Amazon Web Services' Key Management Service. Qualtrics does support bringing your own key. Customer supplied keys must be stored in AWS KMS service.

Data in Transit

All access to Qualtrics front-end Services is via Hypertext Transfer Protocol Secure (HTTPS) and enforces HTTP Strict Transport Security (HSTS). The platform supports Transport Layer Security (TLS) for all interaction with the platform. Access to the back-end services using the Qualtrics API supports TLS v1.2. Data is processed by application servers and sent to database servers for storage. Respondent Data includes survey questions, graphics, and other content created in the survey design.

Surveys may be protected with passwords. Our services are hosted by trusted third-party data centers that are SSAE-16 SOC 1 Type II audited. All data at rest are protected using sophisticated electronic controls, and data on deprecated hard drives are destroyed by U.S. DOD methods and delivered to a third-party data destruction service.

While Qualtrics can protect data, the user account holders at your organization must be protective of username/password combinations used to access the platform, as well as how data is stored, transferred, shared, etc. once downloaded from the platform. Qualtrics also enables role-based access that can be determined by administrators so that only the right people have access to sensitive information.

Service Levels

Since 2010, Qualtrics has maintained an average up-time of 99.97%. By utilizing a microservices architecture, even these rare downtime events are isolated to specific modules or features, leaving the majority of the platform unaffected.

Qualtrics has a latency program in place with real user monitoring to measure page load time across the platform for response start, app interactive, app complete for TP 5/50/90/95. However, page load times are dependent on many factors such as the specific page (e.g. page complexity, connection speeds, etc.) so we do not disclose specific page load times. In general, we aim for pages to load in under 2 seconds but do not commit to specific SLAs.

qualtrics XM

Availability and Recovery

Qualtrics has developed Incident Response policies and procedures to ensure the integrity, confidentiality, and availability of the Data. These policies and procedures are consistent with applicable federal laws, Executive Orders, directives, regulations, standards, and guidance and are set forth by the management teams in compliance with the Incident Response family of controls found in NIST SP 800-53.

An Incident includes:

- A malfunction, disruption, or unlawful use of the Service;
- The loss or theft of Data from the Service
- Unauthorized access to Data, information storage, or a computer system;
- Material delays or the inability to use the Service; or
- Any event that triggers privacy notification rules, even if such an event is not due to Qualtrics' actions or inactions

Qualtrics has a 24/7 SOC team dedicated to handling any security issues and responding to alerts. The Qualtrics response team is comprised of members of its security, support, and engineering teams who have expertise in technical issues, network security, and the software. The Engineer-on-call is available at all times to respond quickly to any issue.

If any Data is affected, the Customer will be notified without undue delay, after a proper assessment, and within two days

The incident response plan is tested at least annually and lessons learned are incorporated into the plan. Additionally, as part of the Lessons Learned phase for every incident, the overall plan is evaluated to determine how to improve the overall process.

Please refer to the Incident Response section of the Cloud Security and Privacy Framework.

The Cloud Security Framework, along with various industry standard security certifications, questionnaires, and more security artefacts can be requested here: https://www.qualtrics.com/trust-center/. Note some of the items require an NDA to be in place (If there is no active contractual agreement established).

Business Continuity and Disaster Recovery

Qualtrics conducts nightly data backups and has quick failover points for all services. Qualtrics data backups are for disaster recovery/business continuity purposes. FCPS is encouraged to back up your own data on a regular basis (can be done manually or by automating it using the Qualtrics API).

Qualtrics has an extensive Disaster Recovery Plan (DRP) that the company will follow in the event of a disaster that would affect Data or Services. A detailed internal document is used by engineers that contains specific details around building, testing, and responding to disasters. Below is a high-level summary of activities:

- Preventative Measures: Preventative measures are currently in place at off-site data centers to minimize the effects of a disaster.
- IT Director Notification: In the event of an emergency at off-site or on-site data centers, the IT manager will receive automatic notification via phone and email.
- Company Directors Notification: If the emergency affects operations, the Qualtrics executive staff will be notified.
- Relocation of Operations: All systems used to provide the Services are located in secure data center and are accessed remotely. Alternate data centers provide redundancy in case of a catastrophic data center failure. Internal operations could be temporarily relocated if necessary, and some employees could work from home or shared office.
- Customer Notification: Customers will be notified by email, telephone, and/or by the web site login page with the details of the emergency. Additional information is located at www.qualtrics.com/status.

The purpose of the DRP is to ensure prompt and complete return to normalcy in the event of a disaster. The objectives of the plan are to ensure that, in event of a disaster: 1) usability is restored promptly with little or no disruption to the User, and 2) Data loss is avoided due to backup measures.

The Recovery Time Objective (RTO) is 24 hours to resume normal operations and Services. The Recovery Point Objective (RPO) is usually less than 4 hours to restore Customer Data. These times are estimates only.

Please note that we do not provide specific details of this plan at this stage of the evaluation process. If this is a requirement, we are happy facilitate conversations between FCPS and our Data and Security teams to provide more understanding behind our DRP.

Responses to FCPS Survey Platform Requirements

The following content is our line-by-line responses to FCPS requirements as specified in this RFP. Our Qualtrics-based solution is able to meet all of the technical, functional, and business requirements FCPS is seeking in a Survey Platform out-of-the-box.

Provide technical platform that will allow campuses and departments to solicit feedback from customers with surveys, record results, analyze trends, report results, respond to customer feedback and use the information to enhance programs to improve desired system wide and campus goals and objectives.

Qualtrics DesignXM provides the business capabilities required to solicit, record, analyze, and report on feedback from across the FCPS system. For more information about the enabling technical and functional capabilities of DesignXM, please see our previous discussions regarding:

- Survey Creation & Design
- Survey Administration
- Panel Management
- Accessibility
- Collaboration
- Multi-language Administration
- Integrations
- Data Management
- Analytics and Reporting
- Scalability

The solution would support both quantitative and qualitative surveys.

Qualtrics enables FCPS to create surveys that can capture Qualitative and Quantitative data via the 100+ different interactive question types. Standard question types available when creating the survey include:

- Multiple Choice / Multiple Select
- Matrix Questions
- Side-by-Side Questions
- Text Entry (single and multi-line)

Qualtrics also includes a number of additional questions types that can be leveraged to track behind the scenes information such as device details, browser type, the time it takes people to complete sections of the survey, etc. (these questions are hidden from the survey takers). There are also image and rich text question types to allow instructions and tailoring of the survey.

The solution would support surveys in multiple languages.

As previously discussed, Qualtrics supports multiple languages for surveys. We have designed the platform to automatically recognize and load the survey language that corresponds to the default browser language of the survey taker, so long as that language has been selected for translation by the survey creator/administrator. There is also a language selector for the respondent if for any reason the displayed language needs to be adjusted. Our functionality supports more than 70 languages including French, Spanish, Arabic, Chinese, Korean, and more. By default, the dashboards are provided in English with translation to other languages available. Qualtrics can scope dashboard translations for FCPS once we have a more detailed understanding of your content, metrics, and other reporting requirements. In addition to surveys and dashboards, our platform also supports translated email messages (survey invitation, survey reminders, and dashboard invitations). For more information, visit https://support.qualtrics.com/survey-platform/edit-survey/survey-tools/response-management-tools/translate-survey.

Furthermore, on the top right of any translated survey, participants will have the opportunity to switch to a new language at any point in the survey without loss of response data. This language dropdown menu is automatically inserted into every page of the survey for user convenience.

Provide ability to develop a common library of standard templates and language for use by the survey designer including but not limited to:

- **Cover letter / front page**
- **Survey standard introduction templates**

Qualtrics provides access to hundreds of survey templates, pre-built questions, automated scale points, and stock images. We provide full library functionality for surveys (including questions and question blocks), images, files and messages. FCPS can control library access to limit access to the appropriate personnel.

Users can copy surveys within a single user account or from one user account to another. Additionally, users can either copy questions as a one-time facsimile, or copy questions as a reference block, so that future changes will be applied to all surveys referencing those questions. Users can copy surveys, provided the brand administrator grants them proper permissions.

Provide preset templates of surveys grouped by type or function for selection by survey designer.

Please see our immediately preceding response.

Provide standard North American research nomenclature for questions and response sets.

Qualtrics library of surveys and questions include standard research nomenclature for questions and response sets tailored to North American demographics.

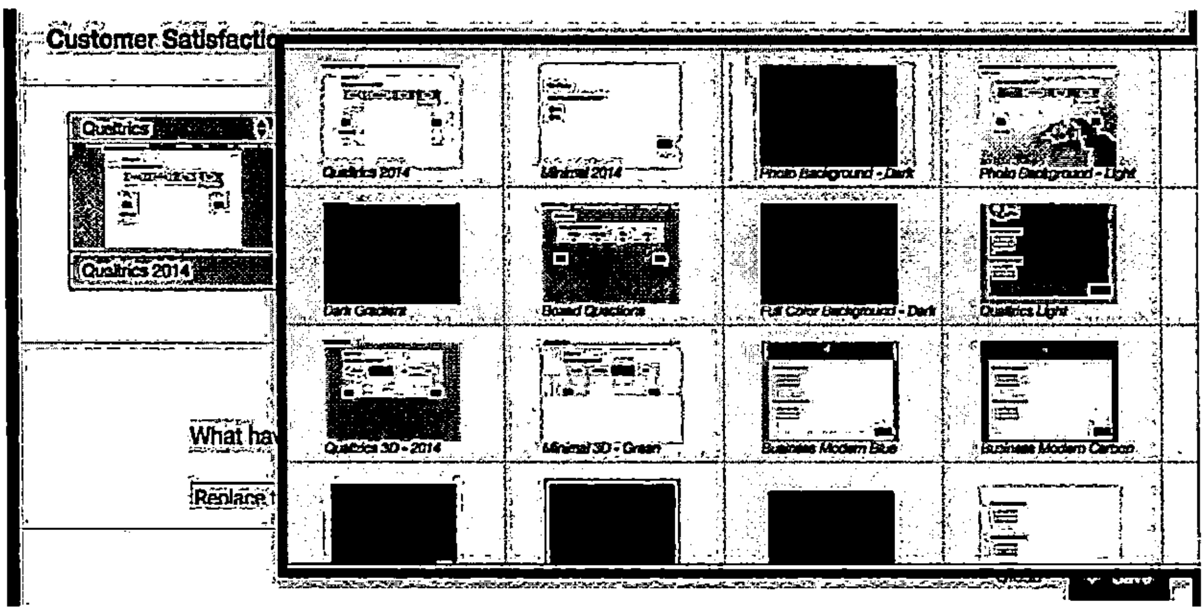
Provide ability to do spell & grammar checks.

The Qualtrics platform provides a built-in spell check feature that will display misspellings, along with suggested fixes.

Provide ability to include branding (logos).

FCPS brand administrators will be able to design customized survey themes within Qualtrics. Our surveys allow for high levels of configuration, including allowing HTML; CSS, and JavaScript. Once a brand administrator creates and approves a survey theme, FCPS users will be able to use that theme to for the surveys they create. Themes can be restricted by user type or hierarchy, allowing for different levels of your organization to have access to different themes depending, for example, on department.

Our platform includes a number of simple, pre-designed themes. These can be accessed in the Look & Feel section of survey design within the survey builder. Users can apply complete survey themes in one click and then make additional modifications from there. Any custom-designed themes, such as from FCPS brand administrators, would also be accessible in this menu depending on the departments and rights of the user creating the survey.

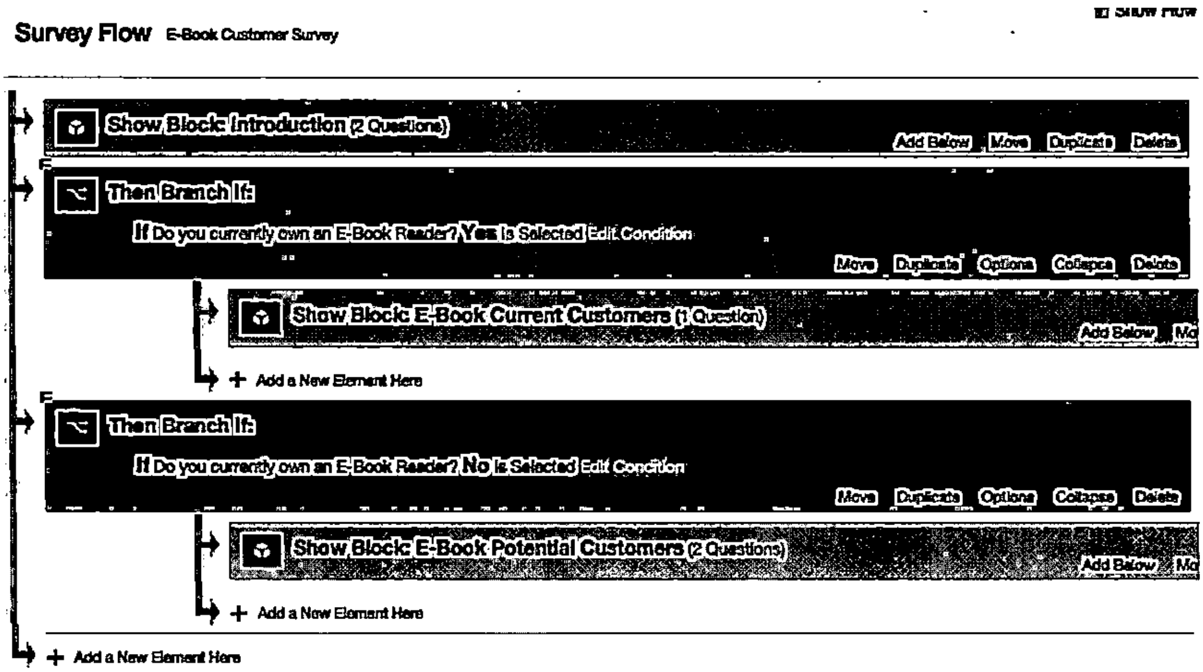


Qualtrics Themes Can Be Instantly Applied to an Entire Survey.

Qualtrics licenses may include the building of custom branded themes for the FCPS library. Our design team would work with you to help ensure that you are getting the look and feel you want. Our Professional Services team can also be brought in to offer support on complex CSS and JavaScript survey designs at an additional fee.

Provide ability to branch questions based on responses.

The Qualtrics platform supports branch logic. You can use branch logic to branch respondents to different survey flow elements based on variables like question responses or embedded data. Depending on how your respondents answer certain questions, they will take different routes through your survey. For example, you can use branches to show one block of questions to survey respondents who own your product and a different block of questions to respondents who don't. You can also use branches to tag users with embedded data labels.



When a respondent reaches the end of a branch that does not terminate in an end-of-survey element, they will pick up with the next section of the survey.

Provide question flow logic diagram to debug and/or validate surveys.

Qualtrics' Expert Review audits logic for validity throughout the survey building process. Scripting interface will check for valid coding format.

Provide ability to route questions based on responses.

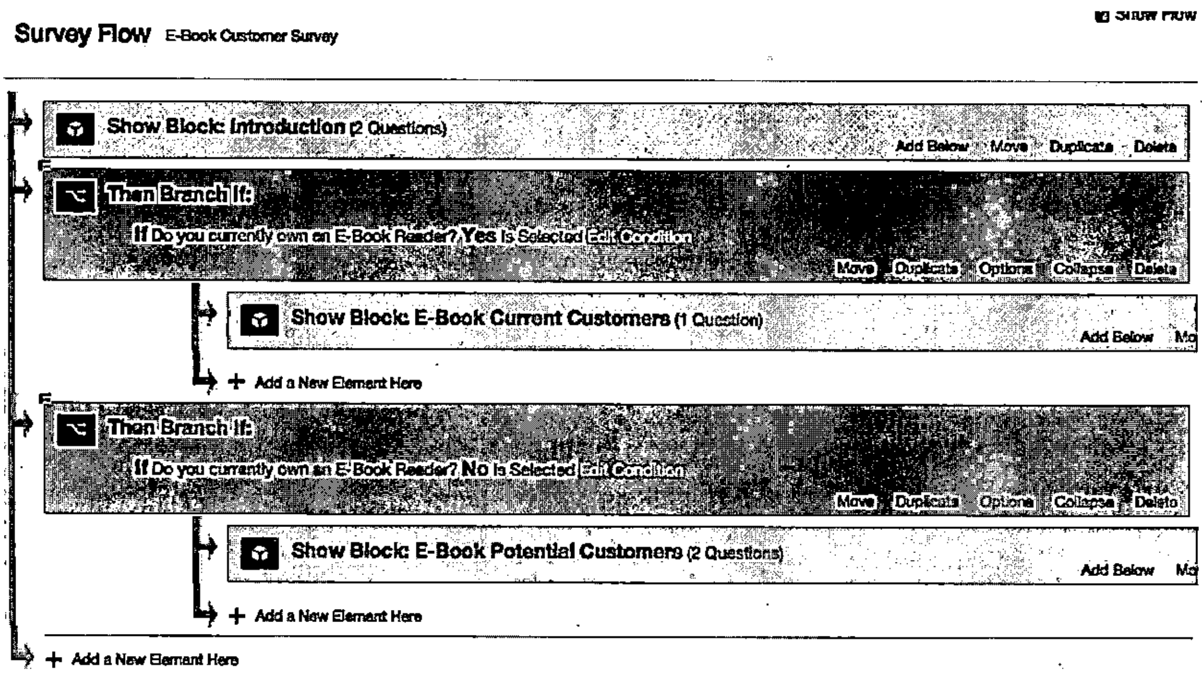
As previously discussed, branch logic may be used to route/branch questions based on responses. In addition, branch logic represents a subset of all of the logic options available on the Qualtrics platform. An expanded list of logic types and logic-based design available on Qualtrics include:

- Branch Logic for showing a block of questions conditionally.
- Skip Logic for jumping to future point in a survey.
- Display Logic for showing a single question conditionally.
- Other Logic based on data such as responses, embedded data, and/or GeoIP

Similar logic options are also available for filtering reports and creating samples of panel members. Furthermore, Qualtrics provides the ability to combine multiple logic types to create condition(s) to enable complex workflows and routing.

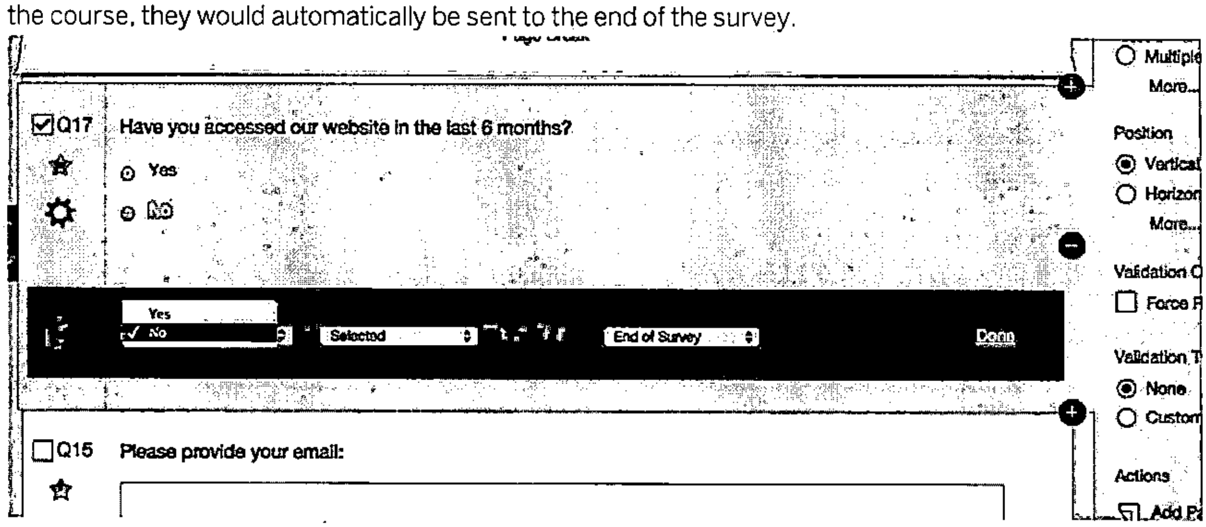
Branch Logic

Branches are useful for sending participants down different paths in the survey. Depending on how participants answer certain questions, they will take a different route through the survey. Use branch logic to branch participants to different survey flow elements based on variables like question response or embedded data.



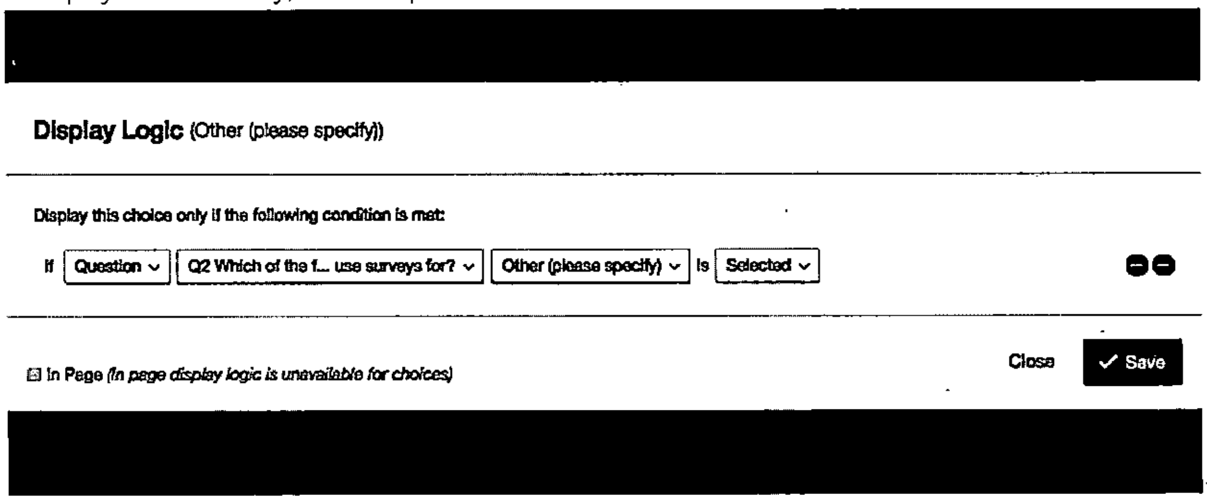
Skip Logic

Skip logic allows FCPS to send respondents to a future point in the survey or straight to the end of the survey based on specific conditions. For instance, if a participant indicates that they don't wish to evaluate the course, they would automatically be sent to the end of the survey.



Display Logic

When a specific question or answer choice only pertains to certain respondents, display logic can be used to display it conditionally, based on previous information.



Types of Logic

Logic can be based on how a respondent answers a question, information we saved ahead of time in a contact list, whether or not a quota has been met, and more. However, based on where you're using logic in the platform, not all of these options will make sense. The table below illustrates the types of logic you can use in each part of Qualtrics.

Logic Based on...	**Branch Logic**	**Display Logic**	**Quotas**	**Custom Validation**	**Email Triggers**	**Contact List Triggers**
Questions	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**
Embedded Data	**Yes**	**Yes**	**Yes**	**No**	**Yes**	**Yes**
Contact Lists	**No**	**Yes**	**No**	**No**	**No**	**No**
Quotas	**Yes**	**Yes**	**Yes**	**No**	**Yes**	**Yes**
GeoIP Location	**Yes**	**Yes**	**No**	**No**	**No**	**No**
Loop & Merge	**No**	**Yes**	**No**	**No**	**No**	**No**
Device Type	**Yes**	**Yes**	**No**	**No**	**No**	**No**

- Logic Based on a Question. You can set logic based on answers respondents give to questions.
- Logic Based on Embedded Data. Piped Text allows you to take the value from any Embedded Data, question, quota, score, and so on that the respondent has data for.
- Logic Based on a Contact List. If you're planning to distribute your survey using a contact list, information from that list (such as name and email address) can be used in logic conditions.

- **Logic Based on a Quota.** Quotas allow you to keep track of how many respondents in certain groups have completed your survey. Logic conditions can be based on whether or not a specific Quota has been met, as well as what the value of the Quota currently is.
- **Logic Based on GeoIP Location.** Qualtrics can use the respondent's IP address to estimate their location. This information can be used in your survey logic. This type of logic can only be applied to branch and display logic.
- **Logic Based on Loop & Merge.** Within a block that has Loop & Merge applied, you can apply logic based on what loop the respondent is currently in. This kind of logic can only be applied as display logic.
- **Logic Based on Device Type.** You can base conditions on the type of mobile device that is or is not being used. This includes Mobile (any mobile device), Blackberry, Android, iPad, iPhone, iPod, Opera Mobile, Palm, Windows Mobile, and Other Mobile (any mobile device that is not listed here).

Adding Multiple Conditions

Sometimes the logic you want to create requires more complex conditions. Conditions can be connected with an AND conjunction or with an OR conjunction. When conditions are linked by AND, that means both conditions must be met. If conditions are linked by OR, that means either condition can be met. Note that as you add more logic, conditions linked by AND are evaluated first, followed by conditions linked by OR.

Creating Advanced Conditions with Logic Sets

As your logic becomes more advanced and includes more conditions, you may need to start using logic sets. A logic set is a group of conditions that are evaluated together. Similar to statements, logic sets can be linked with an AND conjunction or with an OR conjunction. Logic sets allow you to say that if one whole group of statements is true AND/OR if another whole group of statements is true, then the condition is met.

Provide ability to do open text box to allow users to provide open ended responses (i.e. single line, form, essay).

Yes, Qualtrics uses the Text entry question type to collect open-ended responses. Variations of the text entry question type includes:

- **Single Line:** The single line variation provides respondents with a one-line text box. While respondents can write responses well beyond the limits of the box, the single line format encourages a more succinct answer.
- **Multiple Lines and Essay Text Box:** The multiple lines and essay text box variations provide respondents with multiple lines, encouraging respondents to provide a longer response. As you can see below, this change is not reflected in the editor, but in the preview of the question.
- **Password:** The password variation provides a single line text box. Any characters typed into the text box are disguised by dots.

Provide ability to limit the number of responses by an individual.

Yes. Qualtrics can support this through a number of methods, including the use of personalized survey URLs, cookies, authentication, single sign-on, and IP address. In addition, if an administrator wants to prevent a survey from being taken multiple times, he/she has a few options.

- If the link is anonymous, the administrator can select the "Prevent Ballot-box Stuff" option from within the Survey Options menu.
- The administrator can distribute a unique link that will only allow for one survey take.
- The administrator can authenticate each respondent to a panel (a group of uploaded respondents into Qualtrics), which can restrict a respondent from taking a survey multiple times.

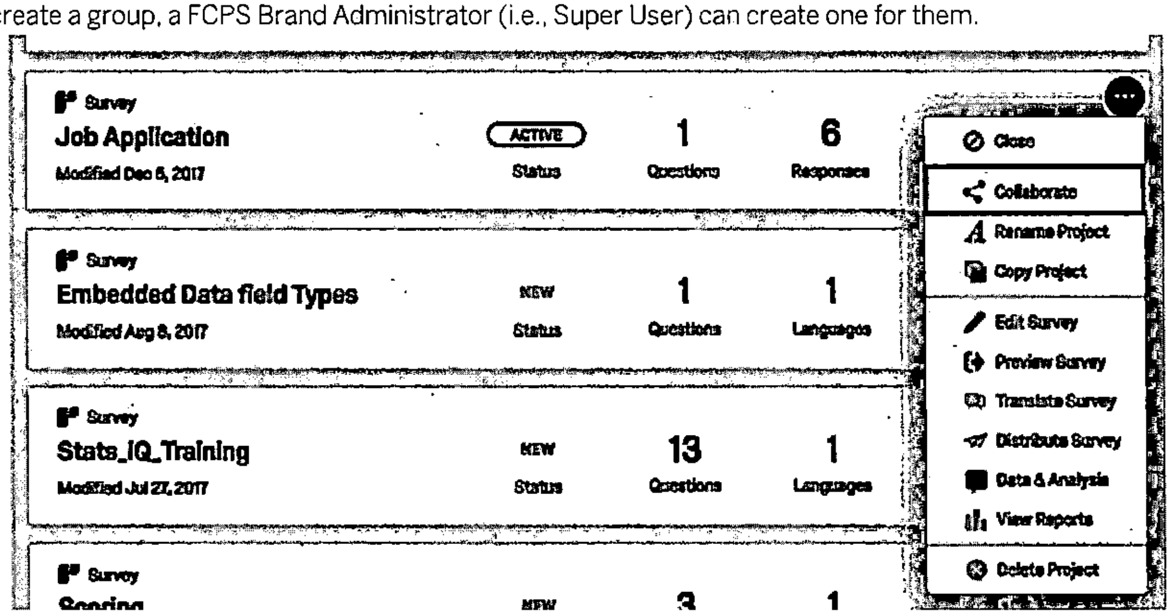
Provide ability to limit survey response open and close periods (start and end).

With the survey availability setting, FCPS can choose to either make your survey available as long as its status is active, or to set an expiration date when the survey will be closed to new respondents. Respondents trying to access your survey before or after the specified range will receive a simple message explaining that the survey is currently unavailable. The expiration date specifically affects participants' ability to start the survey. Those who are in the middle of a response will be allowed to continue taking their survey and finish after the expiration date.

Provide ability to collaborate on survey design and administration.

As previously discussed, Qualtrics collaboration features allow users give others access to surveys when they log into their accounts. This way, your users can work on the same project without giving out account information. FCPS can even choose to restrict what type of access other users have to projects. For example, if you have translators working on your project, you can make sure they have editing privileges, but no access to the data you collect.

FCPS users can collaborate on surveys with individual users and groups in your organization. A group is a set of users with access to a shared library of surveys, contacts, and other project data. If users want to create a group, a FCPS Brand Administrator (i.e., Super User) can create one for them.



Please see our previous discussion on Collaboration Features for more information.

Provide ability to do data validation (i.e. dates).

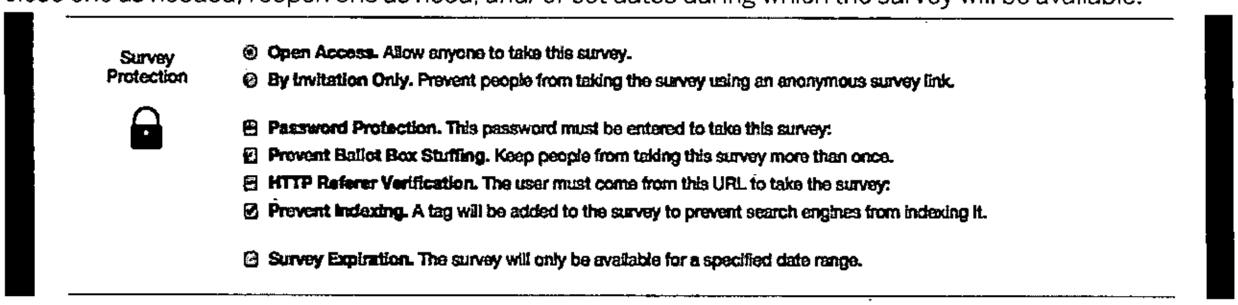
Qualtrics provides data validation features to force respondents to answer a question or request that they consider answering the question before leaving the page. These options can also be used to force a certain type of response (e.g., dates). There are four main validation features available for nearly every question type: force response, request response, custom validation, and custom validation messages. When any of the validation options are enabled, an asterisk icon will appear to the left of the question, indicating that the question has a form of validation enabled.

Provide ability to embed text response as part of multi-choice question response.

Yes, FCPS can include a text entry option for its multiple choice questions. FCPS can also decide the size of the text box, set a character requirement/limit, etc.

Provide ability to keep surveys open indefinitely, to close them, and to re-open them as needed.

Using the survey options of the Qualtrics platform, FPCS can select to keep a survey open indefinitely, close one as needed, reopen one as need, and/or set dates during which the survey will be available.



Provide ability to develop, administer, and maintain an unlimited number of surveys.

Qualtrics supports an unlimited number of questions per survey, and offers an unlimited number of different surveys within the license charge. With Qualtrics you have total control of and access to your survey data. Avoid the waiting game when decisions need to be made. Whether you need the data seconds after launching or years later, you'll always have access to it. You are never forced to archive or bury away the data you need. In addition, individual, role-based, and group administration gives you complete control over data access. Last, detailed logs keep you informed on what is done across the platform so you can keep it secure.

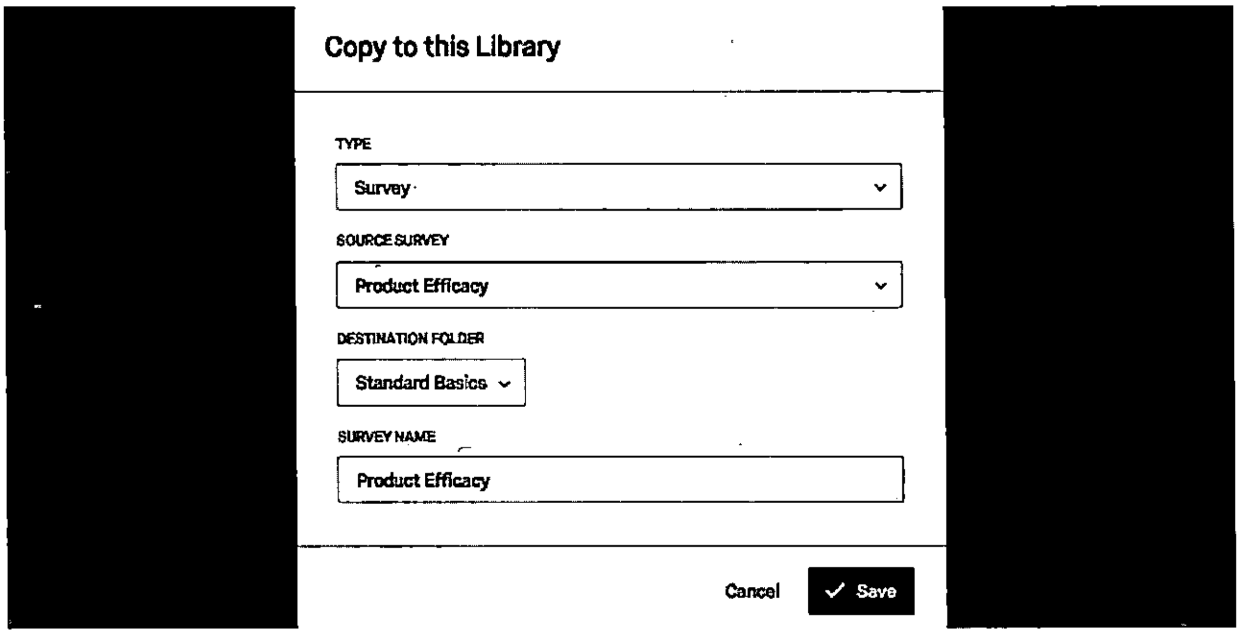
Note: Licenses typically come with a set number of Survey responses that may be gathered.

Provide ability to custom formatting (color, font).

FCPS can completely customize the look and feel of a survey. Users can adjust pictures, logos, fonts, and color schemes to fit the desired branding in a simple point-and-click interface. FCPS can also add additional customization through CSS, taking the survey design possibilities one step further if desired and creating a wholly unique survey experience for respondents.

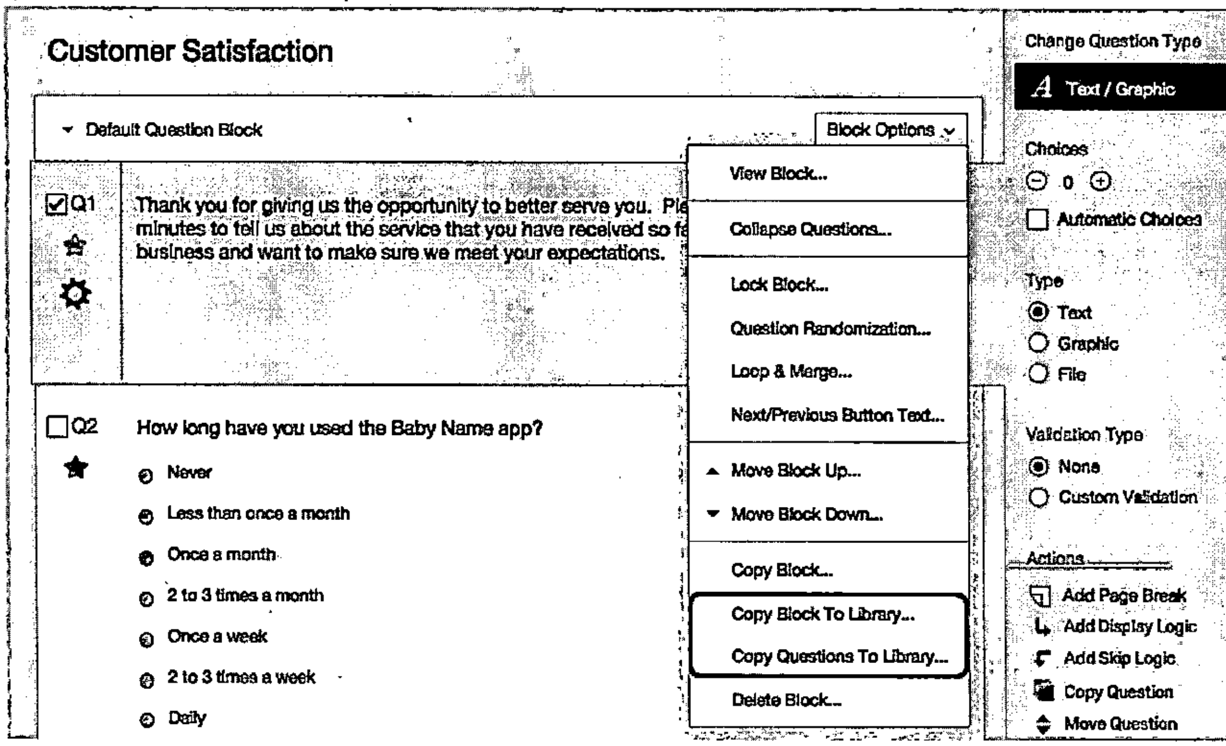
Provide ability to support library of predesigned questions and the ability to add to the library.

Qualtrics can store templates of questions, blocks, and surveys in FCPS's survey library for later use. This includes predesigned questions that may be imported into the Qualtrics environment for FCPS's later use. This library also contains templates from any user group libraries that a user has access to. After storing content, users can insert it into any survey or, in the case of survey templates, use them as reference surveys a survey flow. This resource helps users save substantial time, and we have designed it to be as easy and intuitive to use as possible.

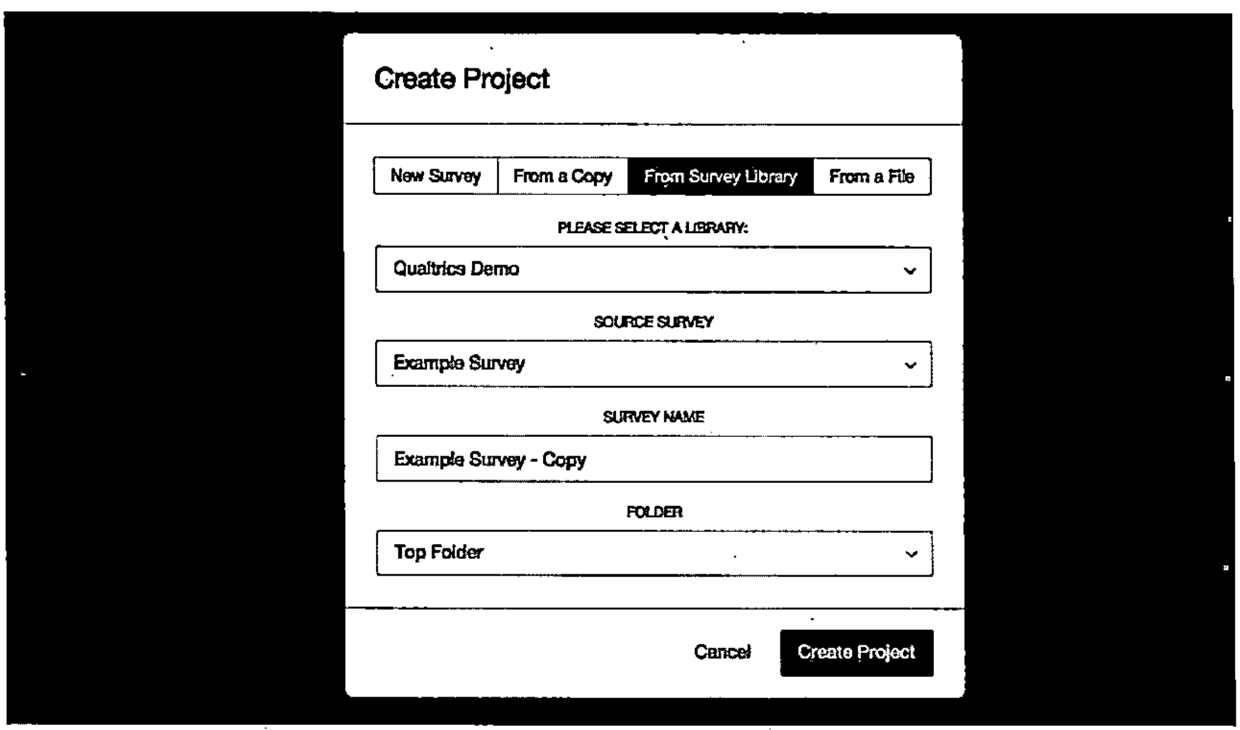


Copy and Move Library Information in a Few Clicks. *Save substantial time and have a survey to work with right off the bat.*

Information can be copied from the library directly into surveys during survey creation. The same applies for survey blocks or entire surveys. Content can also be saved as users create it, from survey flows to question blocks or individual questions.



Copy Library Content Directly from Surveys. *Save and re-use content throughout all of your surveys.*



Get Started with a Pre-Existing Survey. *Create projects directly from the survey library to jump right Into survey creation.*

Provide ability to support template designs and the ability to save designed surveys.

Qualtrics provides FCPS the ability to develop, save, and utilize survey templates in the form of themes that may be used on a per-survey or organization wide basis. There are two types of branded themes that Qualtrics provides:

- Dynamic themes are made up of a logo, primary color, and background image and/or color. Brand Administrators can create dynamic themes the whole brand can use, or they can create dynamic themes for specific user types and divisions. Our "Look & Feel" editor makes it easy for administrators to create their own templates and themes with just a few clicks. With this tool, you can increase your admin productivity, comply with brand guidelines, and provide engaging experiences for your survey respondents.
- Static themes are constructed by the Qualtrics Design Team and allow for FCPS-customization beyond the logo, primary color, and background.

Provide ability to copy questions and surveys from previously built surveys.

As previously discussed, Qualtrics provides the ability to copy questions and surveys that have been previously used by utilizing our survey library. The survey library can store templates of questions, blocks, and surveys in FCPS's survey library for later use. This library also contains templates from any user group libraries that a user has access to. After storing content, users can insert it into any survey or, in the case of survey templates, use them as reference surveys a survey flow. This resource helps users save substantial time, and we have designed it to be as easy and intuitive to use as possible.

Provide ability to support testing and debug capabilities.

Qualtrics provides built in features that will warn survey creators of broken logic (i.e., debug) and the ability to preview surveys before they are published (i.e., testing)

Catching Broken Logic: Qualtrics' Expert Review audits logic for validity throughout the survey building process. Scripting interface will check for valid coding format.

Preview Survey: A Preview Survey option is available for testing out the survey to see how it functions and looks on both desktop and mobile web browsers. In the preview survey mode, you can answer questions and move through the survey the same way your respondents would with a real link. The survey will look exactly the same as in the real link, except you'll have some additional options available at the top to help you test your survey. These options won't appear in the real link. In addition to viewing how the survey works and answering questions, FCPS can also preview responses. Preview responses are recorded in your data as a way to let you see what your response data might look like on the backend. These responses do not count toward your license total, and they will only be recorded if the entire survey is previewed and finished. Because of this, a preview can never be a response in progress. Qualtrics can also automatically generate test responses to get a feel for the data set.

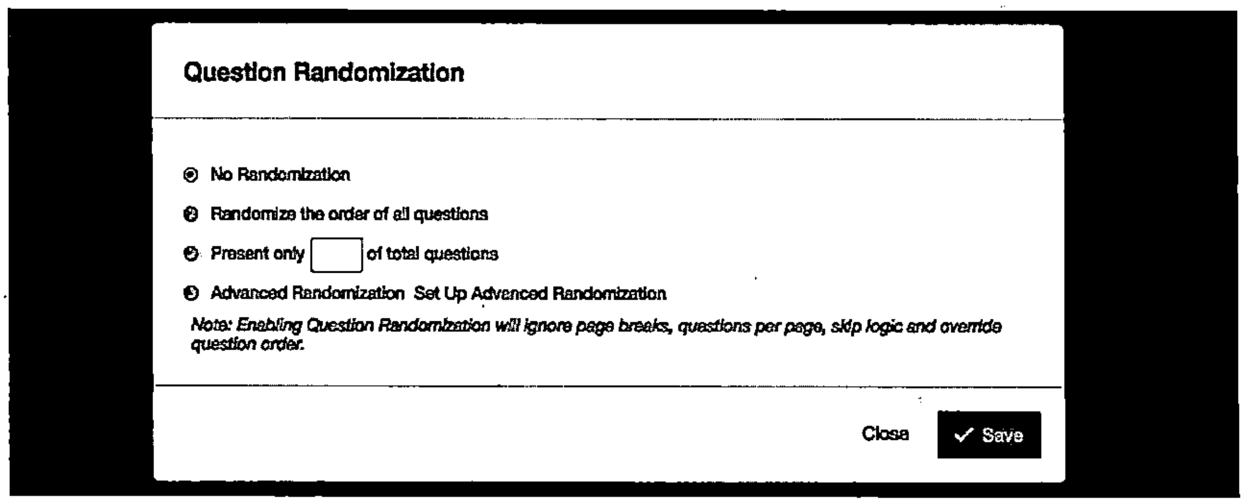
Provide ability to support multiple page layout with control page breaks.

By default, your survey questions will be displayed together on one page, but you can help prevent survey fatigue and improve your respondents' experience by breaking your survey into multiple pages. The Page Break option allows you to separate your question sets across pages within your survey. Page breaks and new pages can be inserted manually or automatically using the Questions per page option. Questions can easily be added by clicking the "Create a New Question" button or by clicking the green plus sign within the survey. For more information, you can visit our Support page: https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/add-page-break/

Provide ability to support question order randomization.

Qualtrics enables FCPS to randomize a list of questions in a block, or pre-defined group of questions. Some of the most common options include:

- o Displaying all the questions in a random order
- o Displaying a set number of questions from a larger group
- o Locking certain questions in a specific position
- o Hiding specific questions.



Setting up Question Randomization. FCPS can randomize questions, helping to ensure that data is unbiased.

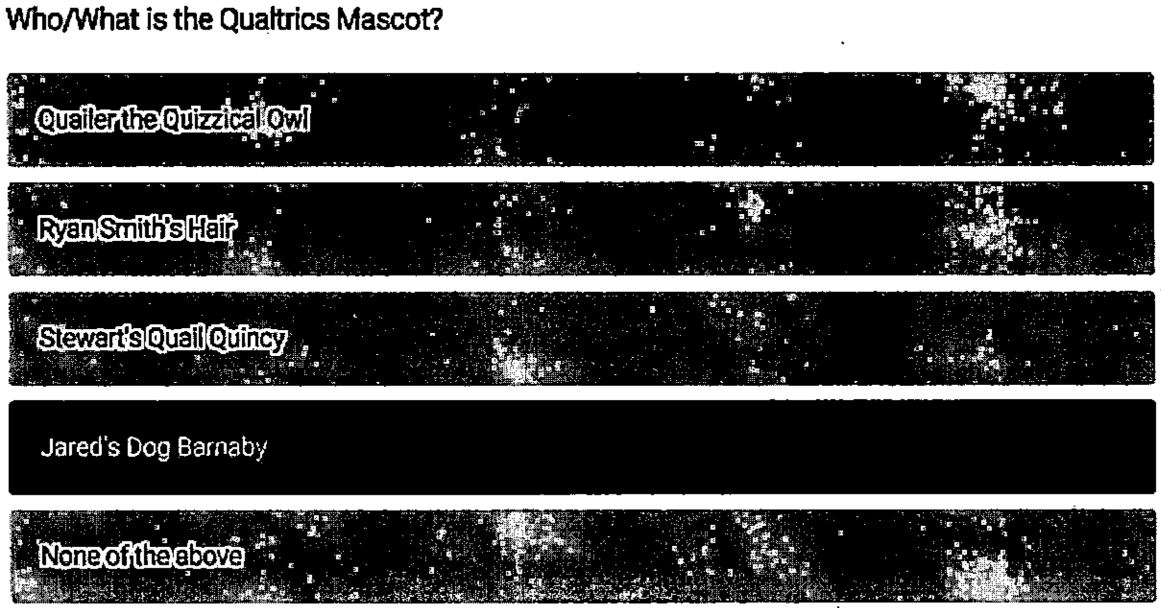
Provide ability to include single selection (radio button, dropdown list) question types.

FCPS may use the out-of-the-box variations of our standard multiple choice question to deploy single selection question types.

- Single Answer Variations. The single answer format allows a respondent to select one, and only one, answer choice.
- Dropdown List. The dropdown list format displays answer choices as a dropdown list; respondents can only pick one answer choice.
- Select Box. The select box format displays answer choices in a list that respondents can scroll through. Respondents can select only one answer choice.

Provide ability to include multiple selection (check box, listbox) question types.

The Multiple Choice question type allows the respondent to choose one or multiple options from a list of possible answers. This is the most common question type due to its simplicity and ease of use for both the survey creator and the survey taker. Qualtrics includes several multiple choice question type options:



Using Multiple Choice Options to Gauge Preferences. *Qualtrics offers several different options for multiple choice answers, giving* FCPS *flexibility over the survey.*

Qualtrics offers several multiple-choice questions options, including the following:

- Single Answer Variations. The single answer format allows a respondent to select one, and only one, answer choice.
- Dropdown List. The dropdown list format displays answer choices as a dropdown list; respondents can only pick one answer choice.
- Select Box. The select box format displays answer choices in a list that respondents can scroll through. Respondents can select only one answer choice.
- Multiple Answer. The multiple answer format allows a respondent to select multiple answer choices.
- Multi Select Box. The multi select box format displays answer choices in a list that respondents can scroll through. Respondents can easily select multiple answer choices through several methods.

Provide ability to include single selection (i.e. true/false or Yes/No) question types.

Qualtrics provides single selection questions as part of our Multiple Choice question type. A Multiple Choice question type allows the respondent to choose one or multiple options from a list of possible answers. This is the most common question type due to its simplicity and ease of use for both the survey creator and the survey taker. The Multiple Choice question type contains both Single Answer and Multiple Answer variations.

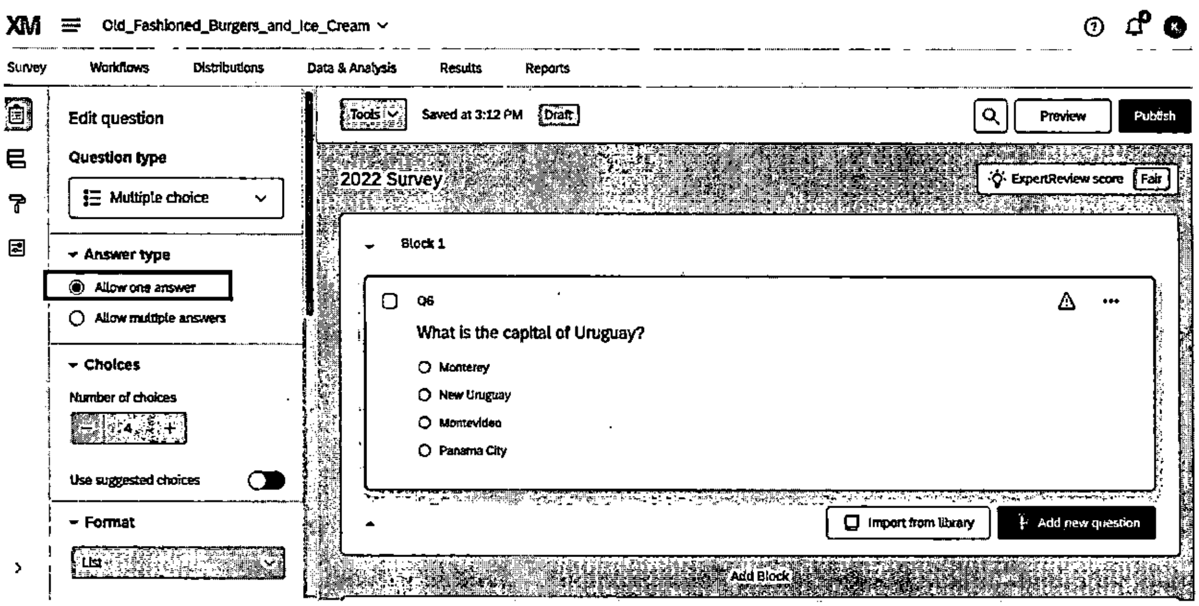
Single Answer variations:

- List Format: default format for multiple choice questions. In this format, answer choices are presented to respondents in a list view
- Dropdown: displays answer choices as a dropdown list; respondents can only pick one answer choice
- Select Box: displays answer choices in a list that respondents can scroll through. Respondents can select only one answer choice

Multiple Answer variations:

- List Format: default format for multiple choice questions. In this format, answer choices are presented to respondents in a list view
- Select Box: displays answer choices in a list that respondents can scroll through. Respondents can easily select multiple answer choices through several methods

Please see the image below for an example of a single selection question (e.g., List Format):



Please visit the following link for more information about Multiple Choice question types: https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/multiple-choice/?parent=p001132.

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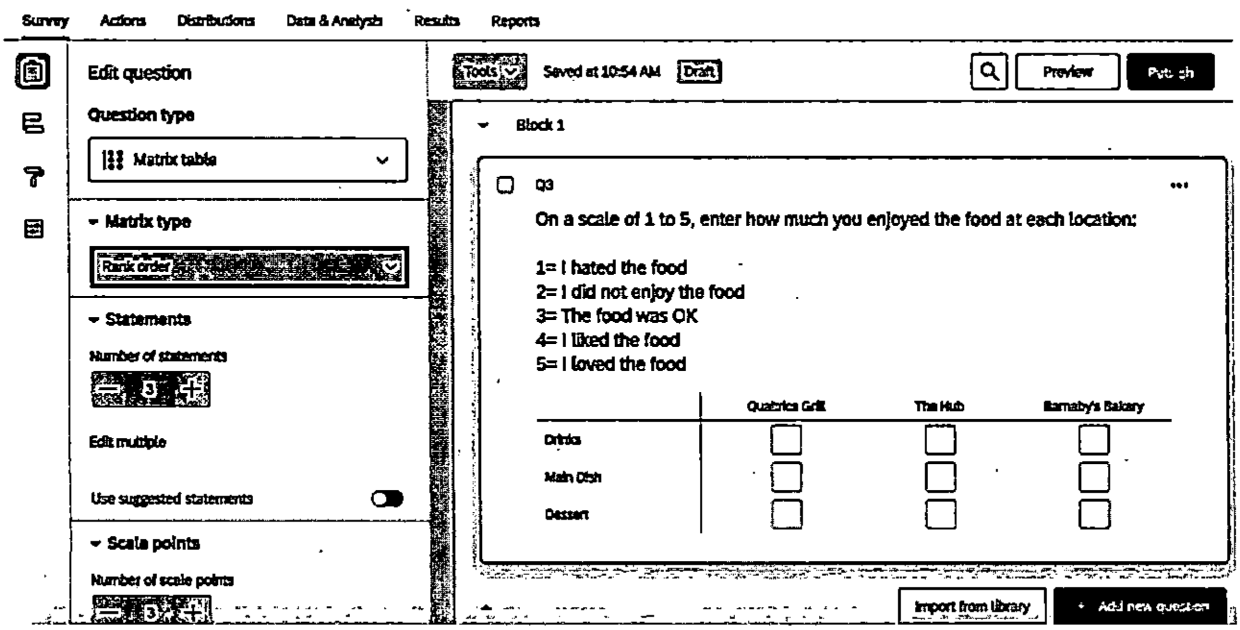
Provide ability to include rating question types.

Qualtrics provides rating questions as part of our matrix table question type. A matrix table question type that allows you to combine multiple questions with the same answers. This is most useful when you need to ask multiple questions that should be rated on the same scale. Variations include:

- Likert: displays a list of statements (rows) and scale points (columns) in a table format
- Bipolar: displays two extremes of a scale. Respondents select a point between the two extremes
- Rank Order: allows respondents to rank a set of scale points by typing in a number for each one
- Constant Sum: allows respondents to allocate resources among the items in each row. As the respondent provides answers, the total resources can be displayed to the respondent
- Text Entry: each row contains a set of text entry boxes. This variation looks and acts similar to the text entry – form question type
- Profile: allows you to label every single scale point within the matrix table separately so each row can have its own scale points
- Maxdiff: specialized variation of the matrix table that allows respondents to choose one option in each of two categories

Please see the image below for an example of a rating question (e.g., Rank Order):



Please visit the following link for more information about matrix question types: https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/matrix-table/.

Provide ability to include ranking question types.

Qualtrics provides a Rank Order question type that provides respondents the unique opportunity to rank a set of items against each other. Variations include:

- Drag and Drop: respondents drag items into their preferred order. This variation is appropriate for shorter lists where you want respondents to rank each item
- Radio Buttons: respondents choose a rank for each item from a list of possible rankings.
- Text Box: respondents type in their preferred ranking for the provided options.
- Select Box: an alternative to drag and drop ranking. Respondents select items and then rank them by clicking the arrows to move each item up and down

Please see the image below for an example of a rank order question (e.g., Drag and Drop):

Please rank the following restaurants (1 being the best).

To rank the listed items drag and drop each item.

1 Japanese Bistro

2 Chinese Checkers

3 The Italian Place

4 The Corner Cafe

>>

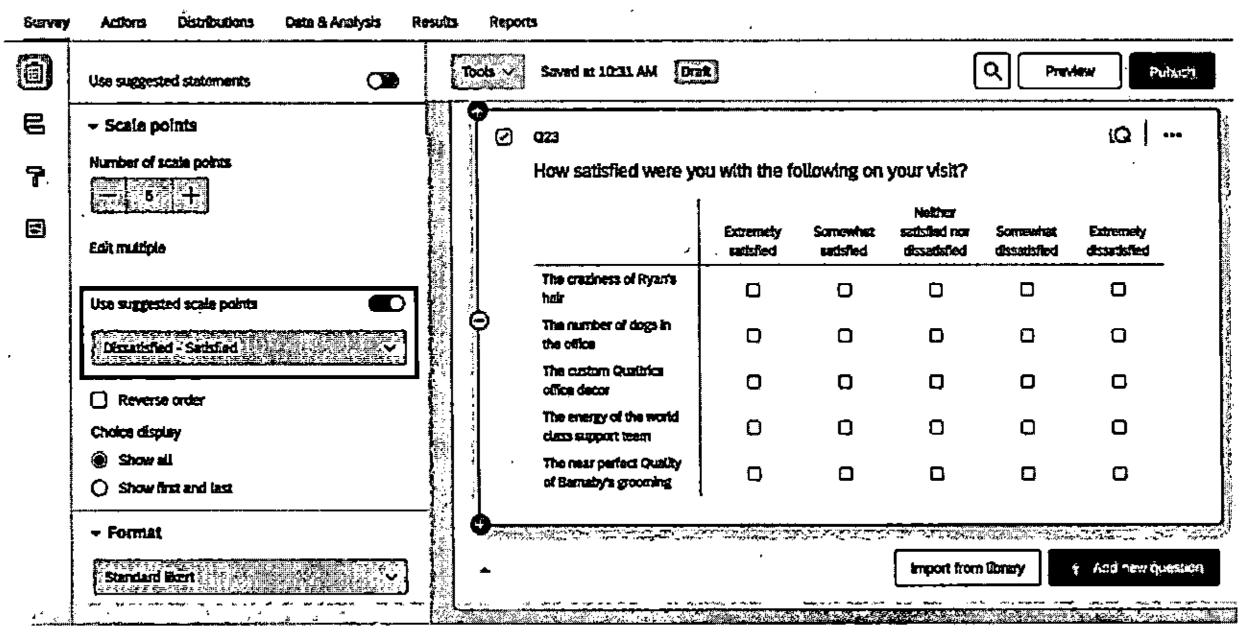
Please visit the following link for more information about the rank order question types: https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/rank-order/.

Provide ability to include rating matrix question types.

Qualtrics provides a matrix table question type that allows you to combine multiple questions with the same answers. This is most useful when you need to ask multiple questions that should be rated on the same scale. Variations include:

- Likert: displays a list of statements (rows) and scale points (columns) in a table format
- Bipolar: displays two extremes of a scale. Respondents select a point between the two extremes
- Rank Order: allows respondents to rank a set of scale points by typing in a number for each one
- Constant Sum: allows respondents to allocate resources among the items in each row. As the respondent provides answers, the total resources can be displayed to the respondent
- Text Entry: each row contains a set of text entry boxes. This variation looks and acts similar to the text entry – form question type
- Profile: allows you to label every single scale point within the matrix table separately so each row can have its own scale points
- Maxdiff: specialized variation of the matrix table that allows respondents to choose one option in each of two categories

Please see the image below for an example of a matrix table question (e.g., Likert):



Please visit the following link for more information about matrix question types: https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/matrix-table/.

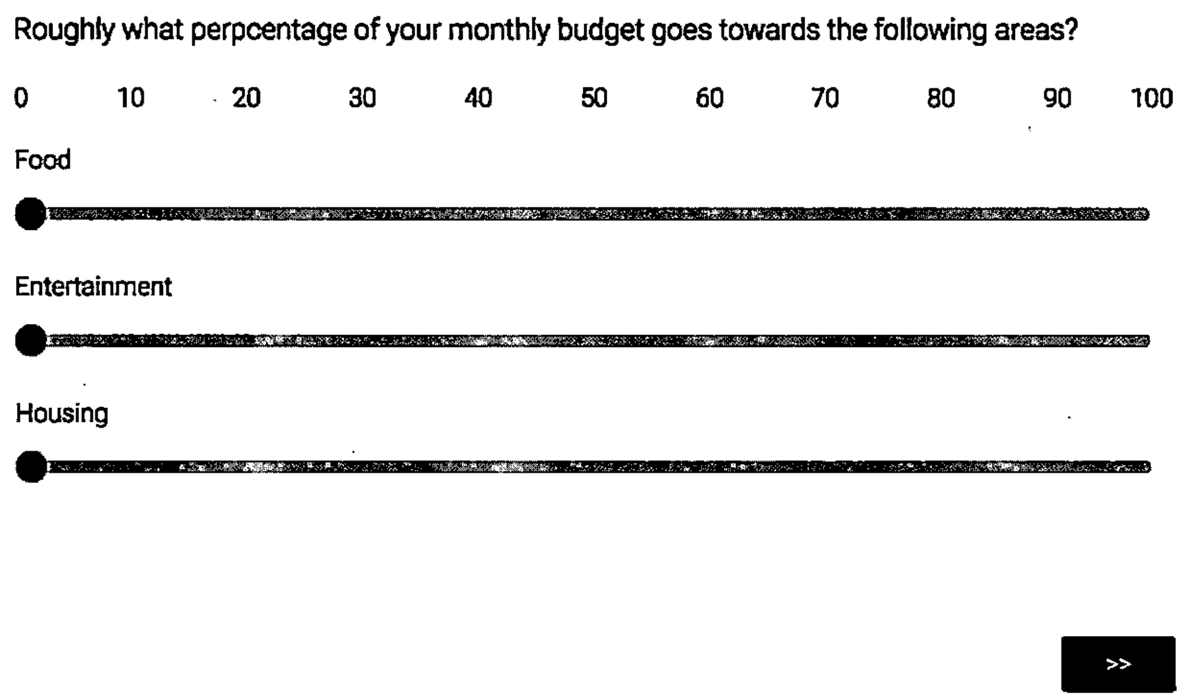
Provide ability to include free form response question types.

Qualtrics uses the Text entry question type to collect free form responses. Variations of the text entry question type includes:

- Single Line: The single line variation provides respondents with a one-line text box. While respondents can write responses well beyond the limits of the box, the single line format encourages a more succinct answer.
- Multiple Lines and Essay Text Box: The multiple lines and essay text box variations provide respondents with multiple lines, encouraging respondents to provide a longer response. As you can see below, this change is not reflected in the editor, but in the preview of the question.
- Password: The password variation provides a single line text box. Any characters typed into the text box are disguised by dots.

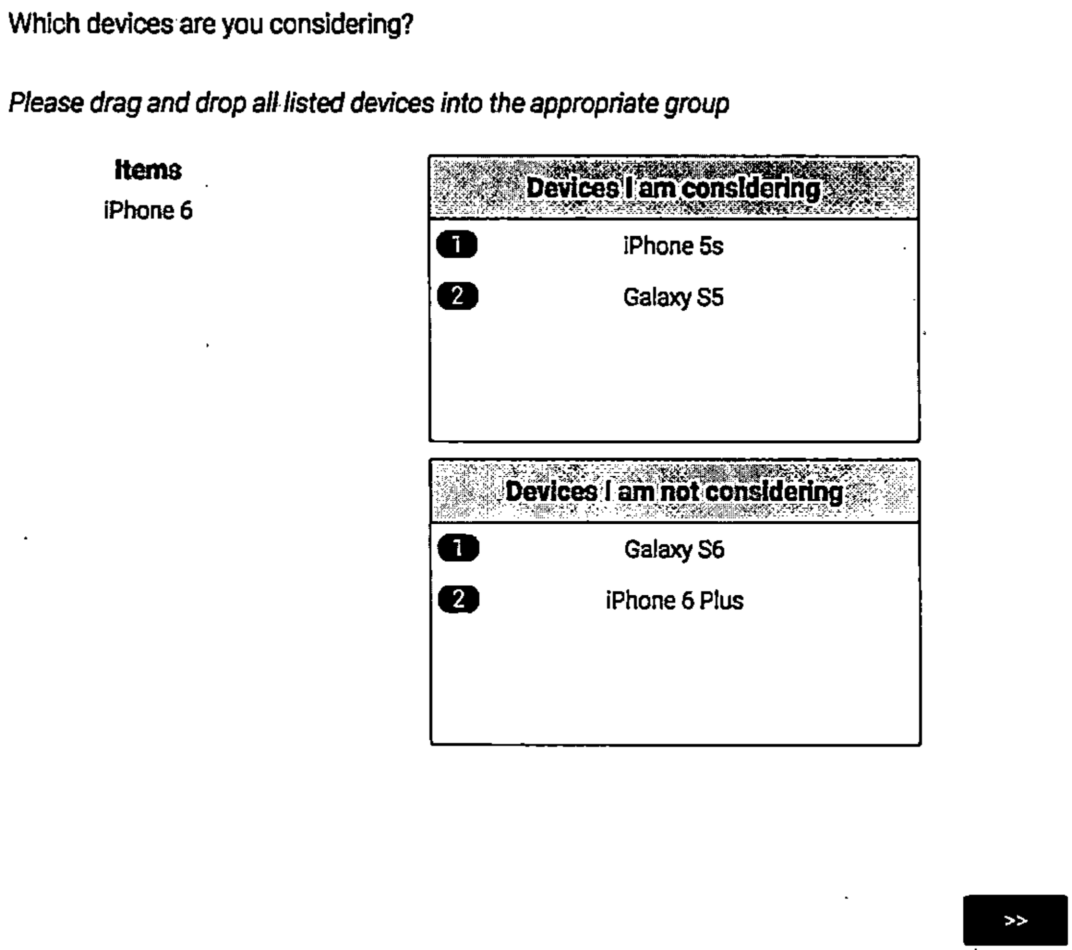
Provide ability to create scales with bipolar anchors.

Qualtrics natively supports labeling and anchoring rating scales within questions. Specific options vary depending on the question type to offer the most flexibility possible. Labels are fully customizable with rich text editing by the individual user to ensure the question best captures the information you are looking for. Qualtrics also supports suggested labels on some question types, which can help a user quickly select a rating scale that will guide respondents. The following image is an example of scale-type question.



Provide ability to create drag and drop types.

Qualtrics natively provides a drag-and-drop question type for FCPS use. Please see the below image for an example of a drag-and-drop question.



Please visit the following link for more information about this question type, including information on the Pick, Group, & Rank question type under which drag-and-drop sits: https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/specialty-questions/pick-group-and-rank/.

Provide ability to use calendar widget for date input.

Popup calendars can be added to any survey via JavaScript.

Provide ability to save responses.

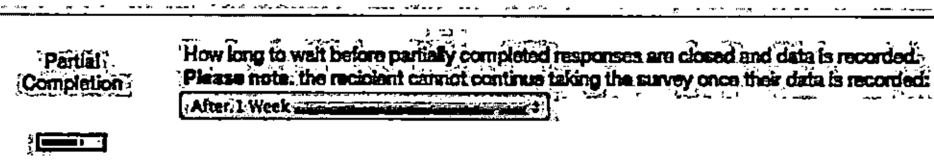
Survey administrators can easily add the "save and continue" functionality to any survey. Save and continue works by placing a cookie on the participant's browser that keeps track of their progress. If you are distributing your survey using individual links, progress is tracked automatically, and save and continue is not needed. By default, respondents have one week to return to the survey and finish their responses. After a week, their response will be recorded as is. This time period can be changed using the partial completion setting. If a survey is marked as completed, administrators also have the option of using a retake link which is a URL link that can be used to retake a specific survey response.

Provide ability to go back through the survey.

Participants will be able to go back and forth between sections of the survey/application to review and edit all of their responses. A Back-Button can be activated in the survey to enable this.

Provide ability to save drafts with reminders for completing survey.

Save Response Drafts: After a participant starts a survey, they have a certain amount of time allotted for them to complete the survey, regardless of the survey's activation status or expiration dates. Responses are saved automatically as surveys are taken—no need for respondents to click any sort of "Save" button. Each time a survey participant comes back to the survey, the allotted time resets. If the participant doesn't come back within the allotted time frame, the response will automatically be closed as-is and moved over to completed responses.



Qualtrics allows you to choose how long partial responses will remain in responses in progress before being closed and deleted or moved over to completed responses, depending on the survey settings for that particular survey.

Follow Up: To follow up with respondents who haven't completed their responses, FCPS may send a reminder email. These emails will only be sent to individuals who have not yet completed their response and will include a link to that user's unique session. If they have already started uploading a response, they will continue where they left off, and those who haven't begun can start at the beginning. The intervals of the reminders can be configured as needed.

Provide ability to distribute survey internally and externally (email and survey links).

The Qualtrics mailer provides an easy and convenient way to distribute your surveys to large groups of people. By using the mailer, you can send customized email invitations to your participants, track their progress, and prevent fraud and abuse of your survey. FCPS can route outgoing Qualtrics messages through your own mail server using Simple Mail Transfer Protocol (SMTP). You can maintain complete control over emails sent out through Qualtrics, including the default "from address" and bounceback information.

The platform assigns a unique link to each individual to whom the survey is sent and associates their personal information with their survey response, allowing FCPS to send reminder messages to those individuals who have not yet completed the survey without disturbing those who have.

For those cases where an administrator needs to use a third-party mail system to distribute survey invitations, but also needs to track which responses belong to which recipients, Qualtrics can generate a list of unique survey links. The content of an email invitation is very customizable. The administrator will have the ability to pull any panel information (information from an uploaded list) and place that into the email invitation. This translates into a very customized invite for each respondent.

Provide ability to distribute survey through web medium.

Qualtrics provides the ability to distribute surveys through the web via:

- Anonymous link
- QR code™
- Create website intercepts

Anonymous Links: The anonymous link is a basic hyperlink used to take a survey. You can distribute this link by pasting it into an email, onto a website, or on in-page pop-ups. Anyone who clicks on the link will be able to take the survey. The Anonymous Link has several key characteristics:

- No identifying information such as name or email address is collected unless you specifically ask for it in the survey.
- By default, progress will be saved as respondents take the survey so they can close the window and return to that same computer at a later date.
- By default, there is no limit to how many times a respondent can use the anonymous link. To prevent multiple responses from the same respondent, we have different methods for reducing the risk of this, such as preventing multiple submissions based on IP address.
- By default, whenever a survey is active, the anonymous link is available for use if you have the link. If desired though, this can be disabled by selecting by invitation only in survey options.

QR Code: Every survey has its own unique QR Code that can be distributed onto any medium. Your survey's QR code is linked to the anonymous link. When someone scans this code with their mobile device, they will be immediately directed to your survey.

Website Intercept: Qualtrics Website/App Feedback captures value from your website visitors with targeted, engaging messages. Our platform helps you to understand more about your website or app visitors and their experiences. These intercepts may be quickly and easily created in Qualtrics, which will provide you with the necessary code to be placed on your website or app.

Provide ability to distribute survey through email.

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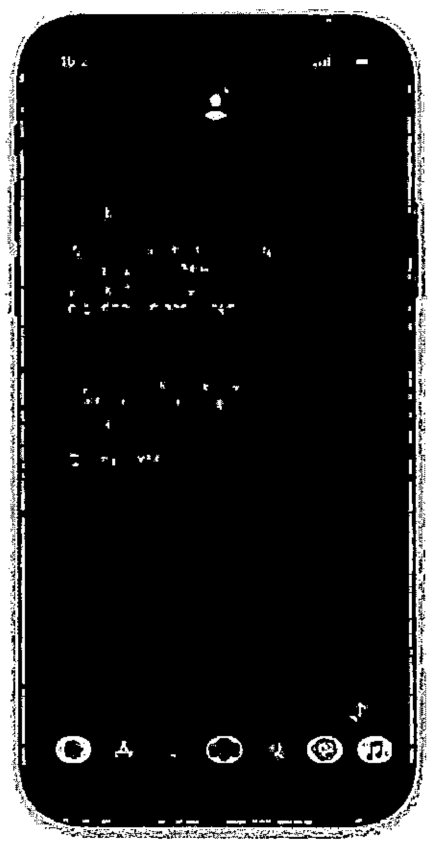
Provide ability to distribute survey through SMS/text message.

Qualtrics SMS distributions help you reach your audience through mobile devices and collect on-the-go pocket feedback. You can distribute surveys in two different ways through SMS: as a "2-way," interactive survey where respondents text their replies to each question, or as a link to the survey sent to the respondent's phone that can be opened in a mobile browser. Surveys sent through SMS are built the same way you would build a traditional survey. However, because 2-Way SMS is a more limited communication medium, only three question types are supported: NPS©, single answer multiple choice, and text entry. Additionally, branch logic, display logic, and custom end of survey messages (in end of survey elements and in the survey's end of survey message) are all compatible.

By default, SMS surveys will be distributed through dedicated, toll-free numbers with a send rate of about three messages per second. If you would like more advanced capabilities, like higher throughput, distributions from the shortcode, or dedicated phone numbers for distribution to many countries, you can purchase features that will fulfill those needs.



You may use Qualtrics' preconfigured setup for SMS distributions, which allows you to leverage Qualtrics' existing relationship with an SMS provider. This method comes with no additional setup, other than the normal steps we describe on this page to prepare surveys, phone numbers, and distributions in Qualtrics. However, if your company has a preexisting relationship with an SMS provider, you can use that to send SMS distributions in Qualtrics instead.

Sending SMS from an Alphanumeric ID

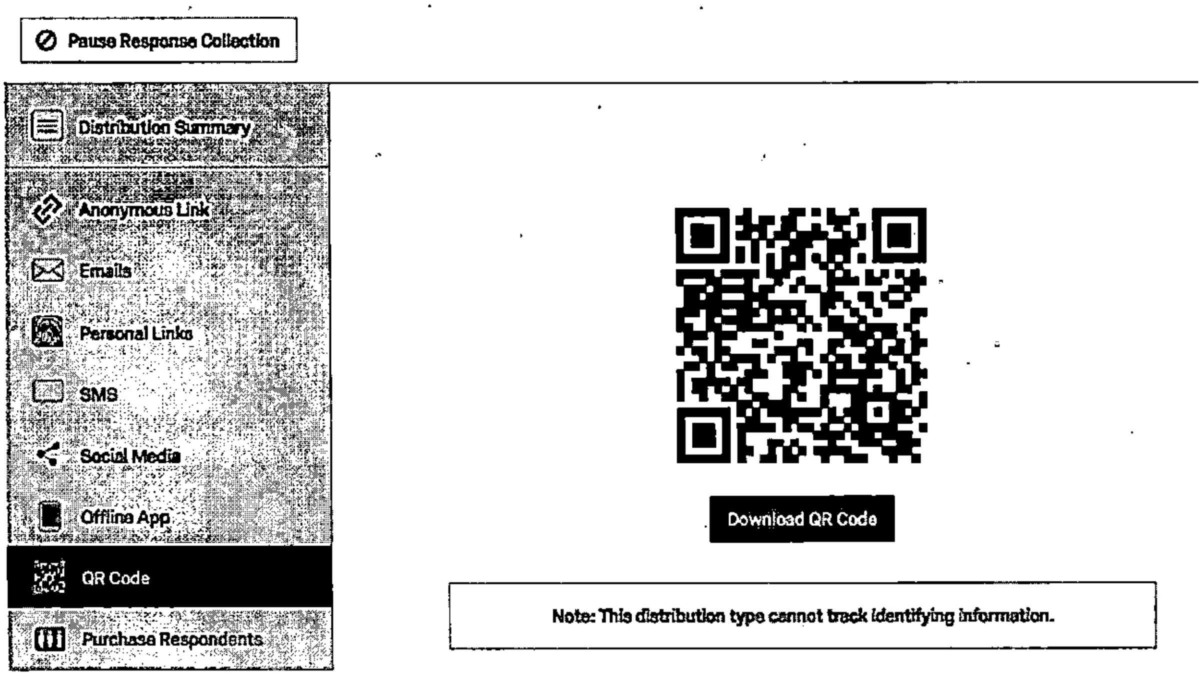
By default, all SMS distributions sent from Qualtrics are from a phone number (e.g., 888-888-8888). If desired, you may choose to send SMS from an alphanumeric ID instead (e.g., QUALTRICSXM). Setting up multiple alphanumeric IDs gives you the ability to send SMS distributions from multiple sender IDs instead of using the same alphanumeric ID for your whole organization.

Distributing a 2-Way SMS Survey

There are two ways of distributing a 2-Way SMS survey: through a list of phone numbers or through Access Codes that your respondents text. With a list of phone numbers, you send an SMS message to a specific group of people who then respond to the message and continue through the SMS survey as normal. Since you're distributing to a list of contacts, the respondent's contact information and their Embedded Data will be saved with their response. With the Access Codes, you are given a unique 10-digit toll-free number and a unique code to distribute to respondents however you would like (sent through an email, posted on a flyer, etc.). Respondents message the number a specific code and then are sent the survey questions via SMS. Since this distribution method isn't targeted at individual contacts, contact information is not saved with the response automatically.

Provide ability to distribute survey through QR code.

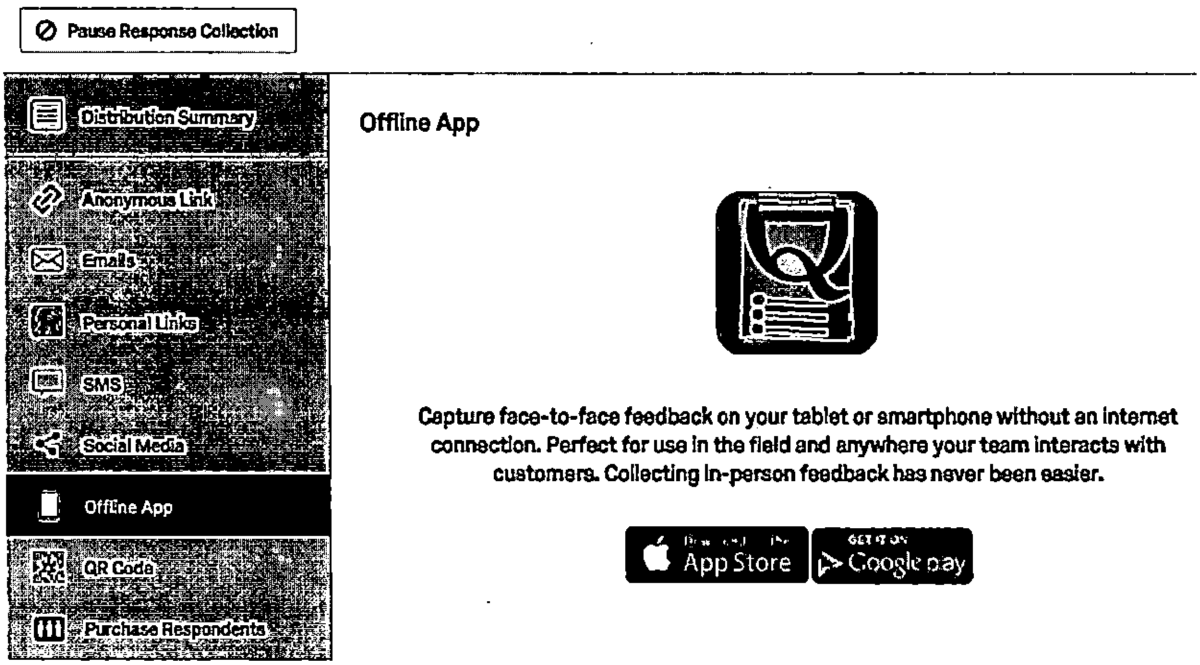
Every survey has its own unique QR Code that can be distributed onto any medium. Your survey's QR code is linked to the anonymous link. When someone scans this code with their mobile device, they will be immediately directed to your survey.



QR Code Distribution. *Give your respondents quick and easy access to your survey through a QR Code.*

Provide ability to distribute survey through tablet.

Mobile response (including tablet) is a standard Qualtrics distribution method. With an available internet connection, FCPS stakeholders will be able to participate in surveys on a tablet or mobile device as they would on a computer. In addition, Qualtrics provides the ability to complete surveys on mobile devices like iPads and Android Tablets without internet connections via the Qualtrics Offline App. This can be very helpful in certain "in-the-field" situations. Simply collect your data and upload your results later to your Qualtrics project for analysis, review, and reporting.



There is a three-step process for setting up the Offline App:

1) Generate an API token: Devices will download questions and upload data to-and-from your project using the Qualtrics API.
2) Download the Qualtrics Offline App to your devices: Download the free app from the iTunes App Store (iPad or iPhone) or from the Google Play Store (for Android devices).
3) Enter your account credentials: Your Brand Administrator can help you with the account information you may need and can also turn on the Use Offline Mobile App permission inside your account.

More information about mobile distribution, including setting up the Qualtrics Offline App may be found here: https://www.qualtrics.com/support/survey-platform/distributions-module/distributions-overview/.

Provide ability to distribute survey through paper.

Qualtrics surveys are designed to be taken online with distribution either by email or by survey link on a website. However, a survey can be exported to a Word document, where it can then be printed and made available in paper format. After response collection, the results can be pulled back into the Qualtrics platform as a CSV file import. Some clients have also used Qualtrics surveys while gathering responses over the phone. The caller inputs the responses directly into a Qualtrics survey, so the data is received real-time the same as if the individual had responded on their own.

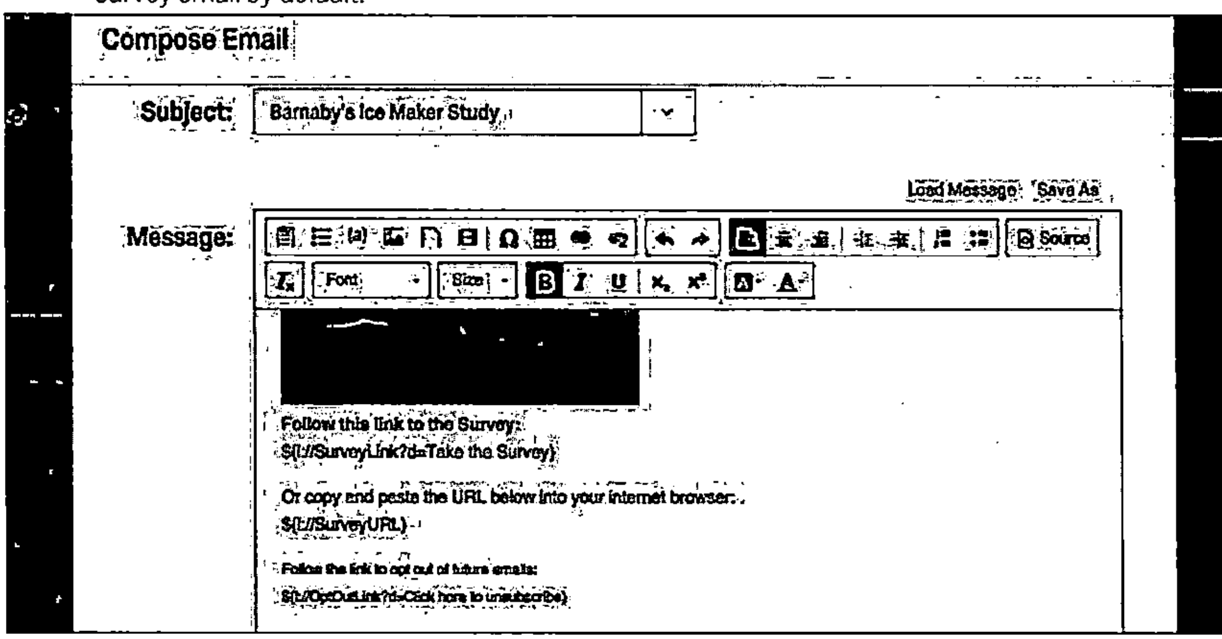
Provide ability to print and distribute survey through paper.

The print survey option is available in the tools section of each survey, and can be used by FCPS users to print a physical copy of a survey or generate a PDF. Surveys can also be exported to Word, allowing for additional formatting as necessary to create a finalized printed version of the survey for distribution based on FCPS's requirements.

Provide ability to have customizable email invitations.

Emails are highly customizable, from timing and piped text to language and translation controls. Email invitations can be customized with the participant's contact list information or by inserting a question from your survey to increase response rates. This information can be inserted into your message by using piped text and an inline email question. By default, all survey invitation messages include three pieces of piped text:

- Custom Individual Link: This piped text will be replaced with a unique link for each survey participant
- Survey URL: This piped text will be replaced with the entire web address of the participant's link, in case they have difficulty clicking on the individual link
- Opt-Out Link: This piped text will be replaced with an opt-out link. When clicked, the participant will no longer receive any further emails from that contact list. An Opt-Out link is included in each survey email by default.



Use Piped Text. Default piped text, such as opt-out links, are included in surveys, but additional piped text can be included based on anything known about the survey participant, including responses to previous surveys.

Other piped text can be inserted into the message, as well as graphics and anything else to help fit the design and look to meet the branding requirements of FCPS. For example, including a survey question in the email invite can make it more engaging and interactive, effectively increasing response rates. When participants receive the email, they'll be able to click an answer to the inline question right from the body of the email. Clicking on an answer will immediately launch the survey in another tab, with their chosen answer already selected for them.

Provide ability to have customizable scheduled email notifications.
All email communications can be scheduled.

Provide bounce-back notifications if email addresses are incorrect or there is an out of office message reply.
Qualtrics provides an automated summary of how all surveys are performing so FCPS will be able to gauge overall impact of surveys quickly and make rapid adjustments as needs. We capture statistical information relative to the responses including record level information, response rates, completion, dropout rates, bounce backs, sent stats, and IP address. All of this monitoring data is available real time, with division/business unit breakdown and easily accessible dashboards for role based access and reporting.

Provide ability to support analysis through response segmentation and clustering
This can be easily done with cross tabulation, pivot tables, and both standard and pairwise t-tests. A prime feature of Stats iQ is cluster analysis, which is a means of detecting the groups that naturally occur in your survey's data set. This is done by analyzing which demographic, behavioral, and/or belief-based qualities are the most highly correlated, helping you perform the segmentation and comparative analysis you need to close gaps for your company.

Provide ability to segment and cluster responses by location.
Yes. Our solution will enable FCPS to view reports by a wide range of categories including location, business unit, etc. However, the reporting capability within the platform is not limited to a set fields. Filters, reports, and dashboards can be based off of any data associated with the respondent or response.

Provide ability to export data to Microsoft office and other statistical (for example SPSS) packaged applications.
Data may be exported in the following formats:

- CSV (Comma Separated Values)
- TSV (Tab Separated Values)
- Excel (Microsoft Excel)
- XML (Extensible Markup Language)
- SPSS (Statistical Package for the Social Sciences)
- Google Drive (Direct export to Google Drive)
- Tableau (Extension with Tableau—only available with the Tableau Extension)
- JSON (Javascript Object Notation) & Open Data Protocol (only available with the API Extension)

Files submitted by survey respondents may also be exported Survey reports may be exported to a PDF, Word, PowerPoint, or CSV document. Dashboard data can be exported or emailed as a PDF, JPG, PNG, or CSV file.

Provide ability to have survey data automatically populate fields in a database.

FCPS can set up Extract, Transform, and Load (ETL) workflows within Qualtrics to export data on a regular basis to FCPS data warehouse. The Qualtrics Workflows platform contains a series of tasks to assist in importing data from third-party destinations into Qualtrics or exporting data from Qualtrics to third-party destinations. These tasks follow the ETL framework. Using ETL tasks, you can create automated and scheduled workflows to bring data from third-party sources into Qualtrics as well as export data from Qualtrics to third-party destinations. To create an ETL Workflow, you must create one or more extractor tasks and exactly one loader task. If you are looking to load data into multiple destinations, you should create separate workflows for each destination. A complete overview of setting up ETL workflows may be found here.

To enable ETLs, FCPS may use SOAP and RESP APIs. Web Service (SOAP) calls can be made from within a survey to access third-party systems to bring in additional data, and occur over HTTPS with multiple format options (e.g. CSV, XML, JSON, SPSS). The Qualtrics REST API enables the automated flow of data between Qualtrics and virtually any other authorized platform. The most common use cases are to pull data stored in Qualtrics into another system, such as FCPS's database, upload files to an SFTP site, add/update contacts, schedule emails/ reminders, trigger surveys, update survey content, export completed survey data, and more. FCPS has the ability to indicate if they want to use PGP encryption as part of the integration process for SFTP-based file transfers. You can find full API documentation for the Qualtrics platform at https://api.qualtrics.com/.

Provide ability to perform conjoint analysis.

The Qualtrics conjoint analysis application is available for users to run their own conjoint projects. This add-on allows for a self-service approach in leveraging conjoint analysis with your Qualtrics research. The application is designed to be extremely intuitive where even inexperienced conjoint users can easily and effectively run their projects.

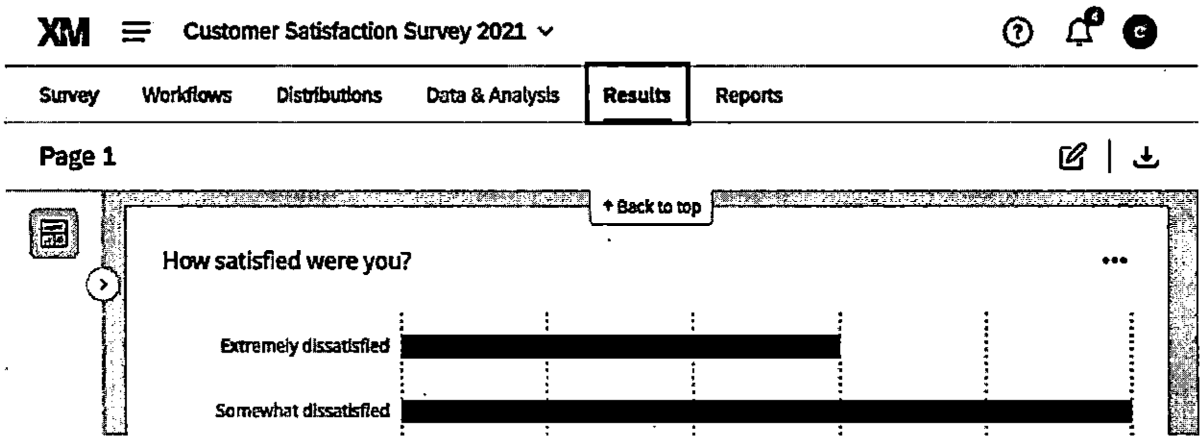
The application allows you to run choice--based conjoint analysis projects and maxdiff analysis projects entirely with a point and click interface with no manual programming. This solution provides the functionality necessary to allow both your market research expert as well as your college intern to efficiently run conjoint analysis projects through Qualtrics. The conjoint analysis application is one more example of why Qualtrics is the leading platform in the world at collecting all different types of feedback. Qualtrics has an out of the box Self-Explicated Model conjoint type question, with a semi-automated Choice-based conjoint analysis package as an optional upgrade.

Conjoint Analysis does the following:

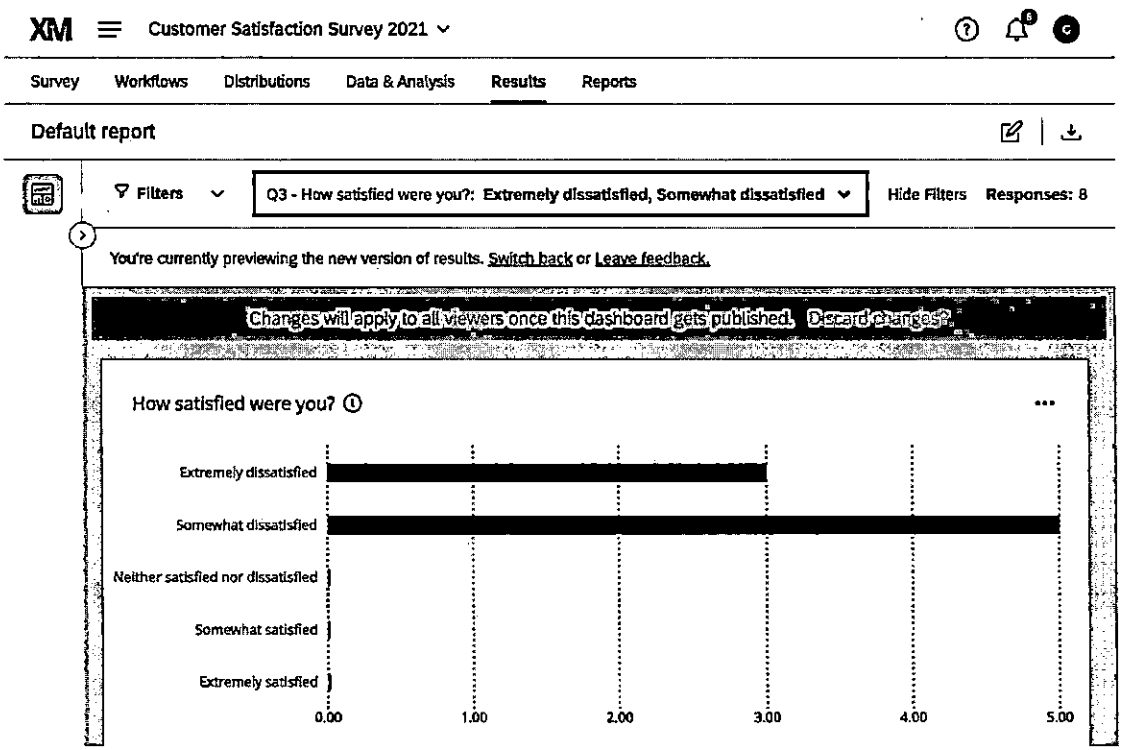
- Allows Researcher to predict choice share for different stimuli
- Provides customers with several sets of options and has the customer select the most preferable option
- Preferences curves are developed for each attribute to show how much customers value different attributes

Provide ability to report responses with graphs.

Results dashboards are designed to give you a quick and simple visualization of your survey results. Each question in your survey will have a visualization pre-made for it. However, there are many customization options available to you to help you build a dashboard to fit your needs, such as Results Dashboards widgets, page types, and page options.



Filtering Results Dashboards: You can filter your entire results dashboard to remove data you don't need. For example, in the below image, we filter our results to show dissatisfied customers since we are interested in analyzing only their data.



Sharing Dashboards: The methods for sharing your report include:

- Download dashboard: Generate and share a digital copy of your results dashboard in a PDF or JPG format. CSV and TSV exports are not available for Results Dashboards.
- Email dashboard: Send your results dashboard as an email attachment.

Provide ability to support dashboard displays.

Our dashboarding and reporting capabilities rival common BI tools and make the crafting and curation of content for specific users, user roles, and responsibilities straightforward. Our Organizational Hierarchy feature adds the ability to automatically filter dashboards based on user and user role, ensuring confidentiality and security.

Dashboards can be edited and customized based on all the data available in the account - users can create their own dashboards via templates or from scratch using all the numerous widgets available (from bar to network to map) to complete their analyses. Interactivity is both automatic and configurable to a high degree, and dashboards can even be combined into 'books' to form larger deliverable packages.

Dashboard creation is extremely flexible and intuitive to the end-user. Users can start from a dashboard template, or create entirely from scratch. Users can choose between Metric Reports, Tables, .Word Clouds, Line/Trend Graphs, Pie Charts, Heatmaps, Bar/Column Charts, and Scatterplots. There is also an option to show "feedback previews" or actual sentences from the customer feedback within the dashboards themselves, not just through drilling into the Document Explorer, the most common method for viewing the underlying feedback that makes up the reports. Users also have the ability to place images and videos within the dashboard to improve aesthetics or to provide additional information.

- Dozens of visualization options
- Widget based UI makes dashboard layouts 100% configurable
- Report on any metric including structured and text-based reporting
- Filter report or dashboard at any level using any field
- Organizational hierarchy to automatically filter to relevant view
- Interactive and drillable to understand the root cause and who, what, where, when, and why something is happening
- Alerting and case management built-in

Dashboards are exportable as PDFs; individual widgets are exportable as excel files with raw numbers or as images to be incorporated in other presentations.

Provide ability to support drill down reporting.

Qualtrics reports include real-time filters and drill-down capabilities that allow you to see and explore various comparisons, breakouts, and scenarios at a glance. These can include any meta data field or any survey data field. There is no limit to the number of filters FCPS can utilize, and if desired, filters can be automatically applied to the roles of the various viewers.

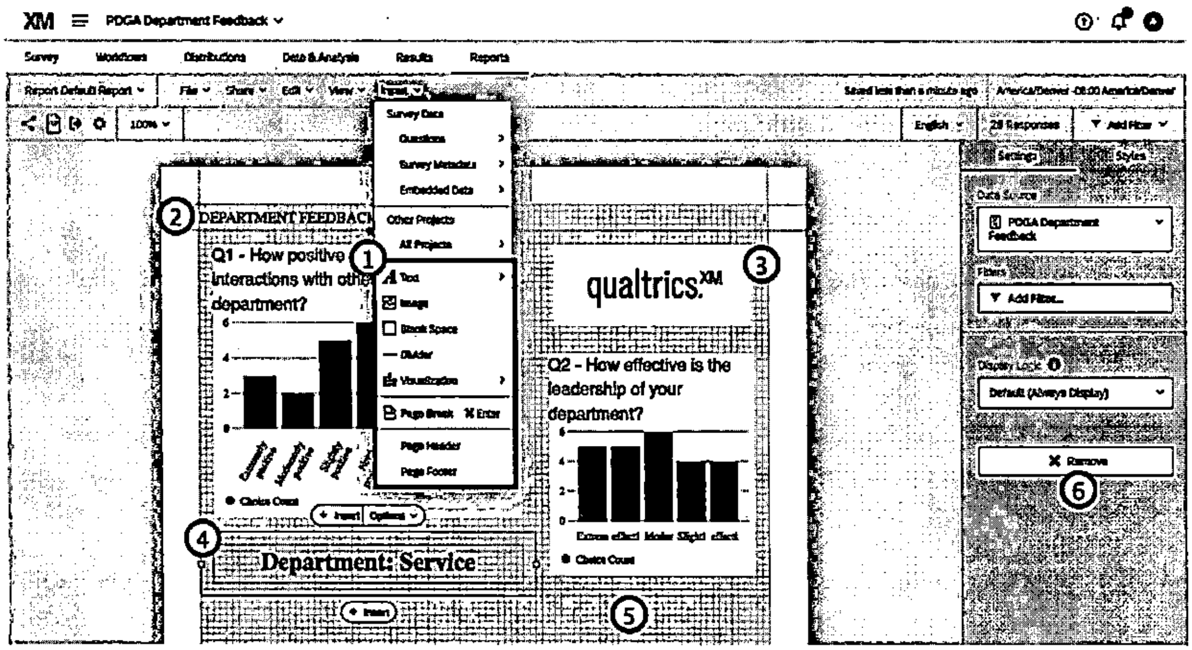
Provide ability to support web based and mobile reporting.

Qualtrics takes a unique approach to web/desktop and mobile reporting. Qualtrics has web role-based dashboards that can be viewed on desktop, mobile web, or within our mobile application (Qualtrics XM App). The views are configurable and once changed by an admin will propagate to all the different channels. There is no need to have to design separate dashboards and update them separately based on the distribution method. This enables executives, program stakeholders, and others that are on the go to keep track of the metrics they care about from their mobile device.

Provide ability to fully customize reports.

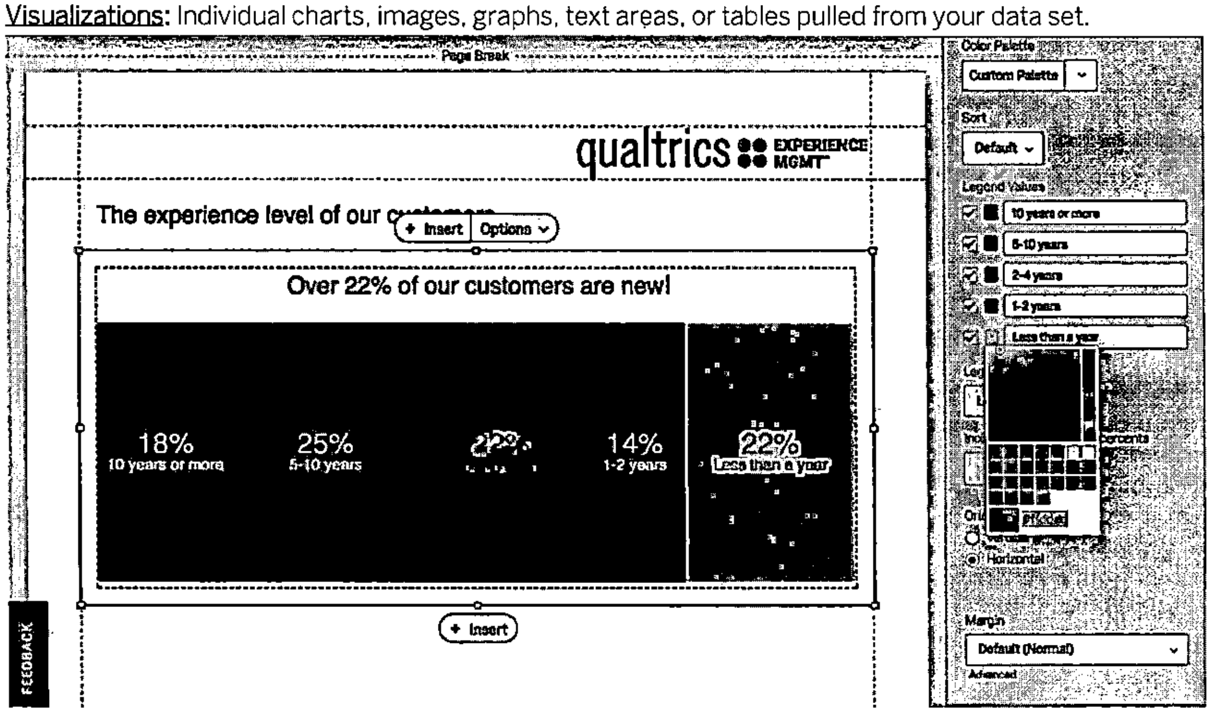
Qualtrics provides built-in reporting capabilities for quickly aggregating, analyzing, and customizing the presentation of your collected data. FCPS-customized reports (i.e., Advanced-Reports) provide basic, descriptive statistics that can be displayed visually or analytically via charts and graphs or tables and crosstabs. Advanced-Reports features provide the layout tools you'll need to design:

Page Layouts: Collections of visualizations with accompanying headers, themes, color schemes, margins, and fonts.

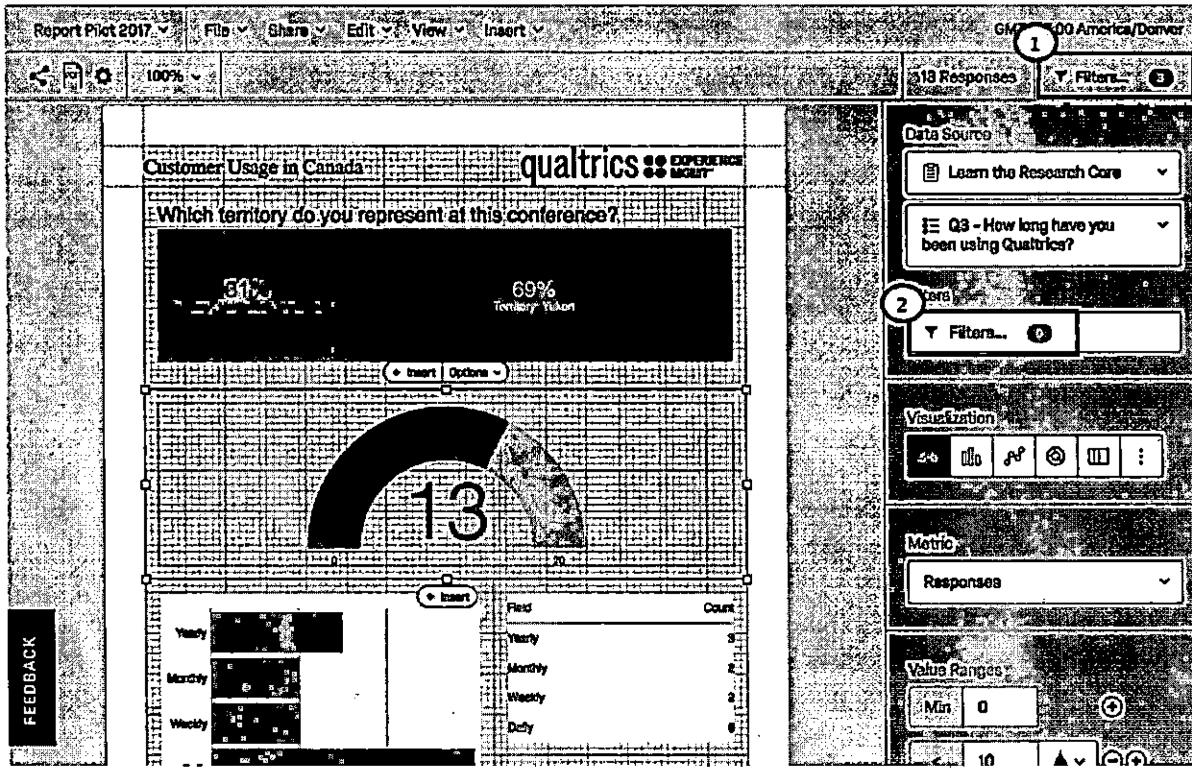


1) Insert Text Areas, Images, Visualizations, Page Breaks, Headers, and Footers. 2) Edit headers. 3) Position graphics. 4) Format text areas. 5) Display gridlines to guide the positioning of elements. 6) Remove elements.

Visualizations: Individual charts, images, graphs, text areas, or tables pulled from your data set.



Filters: Logic to include or exclude data from your visualizations and reports.



1) Global Filters: Click the Filters option in the Advanced-Reports toolbar to filter an entire report. 2) Visualization-Level Filters: Pre-select the specific visualization you want to filter and choose the Filters option from that visualization's editing panel.

These reports can be quickly exported to Word, Excel, or PowerPoint or shared via a live web link. For more information, please visit: https://www.qualtrics.com/support/survey-platform/reports-module/reports-section/paginated-reports-overview/?parent=p002

Provide flexibility in customizing graphical representations of survey data.

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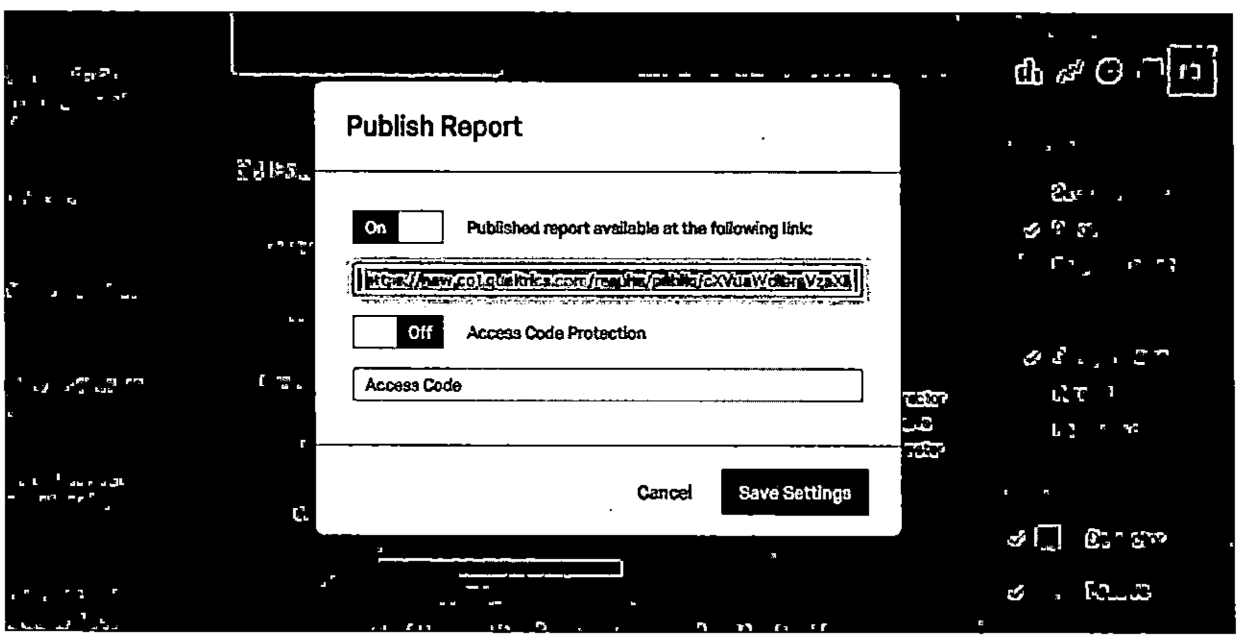
- Interactive and drillable to understand the root cause and who, what, where, when, and why something is happening
- Alerting and case management built-in

Dashboards are exportable as PDFs; individual widgets are exportable as excel files with raw numbers or as images to be incorporated in other presentations.

Provide ability to publish results to websites.

FCPS will be able to publish reports to the web and share the report links with others. These reports are dynamic, searchable, and interactive. In addition, recipients won't need to have a Qualtrics account to view the reports; they'll just need the link you provide. Specific pages and charts can also be easily hidden in the report. Additionally, reports can be protected by an access code.



Easily Share and Protect Published Reports Through Simple Links and Passcodes. *Ensure the safety of your research and surveys through Qualtrics.*

Qualtrics can also export entire reports, individual worksheets, or individual visualizations to a variety of formats, including PDF, Word, and CSV. You can also view previous exports you've completed and download those again. Visualization can be automatically downloaded as PNG files.

Ability to print survey report dashboard to PDF.

FCPS can export results-reports to a PDF, Word, Powerpoint, or CSV document. Dashboard data can be exported or emailed as a PDF, JPG, PNG, or CSV file. The Qualtrics API allows for automated import/export of data and can be integrated with other systems as needed.

Provide online training videos/tutorials for survey creators.

We want to ensure you have what you need to be successful with Qualtrics and get the most out of your license. To help your team master the Qualtrics product and grow your experience management programs, we have a number of support and advisory offerings that have been included as part of our proposal to FCPS.

XM Basecamp: XM Basecamp is the official site for online Qualtrics training resources. Your team will be able to access XM Basecamp free of charge with their Qualtrics credentials. On XM Basecamp you will find an extensive library of on-demand training videos and courses that will cover both the Qualtrics product and XM methodology. Qualtrics Certification courses are also available on XM Basecamp. These courses provide a structured learning journey for your team to learn Qualtrics. They consist of training content, hands-on activities, quizzes, and a proctored certification exam to verify mastery of the Qualtrics platform.

Qualtrics Support: Qualtrics has an online website, https://www.qualtrics.com/support/. This site provides an online feature-by-feature user guide. It contains articles, guides, step-by-step instructions for using most every platform feature, video examples, and more.

Qualtrics Community: We offer an active, international, and free forum for all Qualtrics users. Our system connects professionals drawn from our 16,750 enterprise clients, allowing questions to be asked and best practices around using Qualtrics to perform world-class research to be shared. This service allows Toronto Police Service's employees to discuss a variety of Qualtrics' best practices with a diverse group of users, including CEOs, CFOs, university professors, managers and stakeholders from all fields. This will help drive innovation at Toronto Police Service so you can get the most out of our platform.

Research and Qualtrics veterans are encouraged to share their expertise, receiving badges and community recognition when they provide quality comments. Community features like up-voting, downvoting, and flagging help ensure that the most valuable, relevant, and useful feedback rises to the top. We encourage users to post frequently and use tags to help make content easier to find for those searching for answers. Some examples of tags include administration, action, CAS SSO setup, CX, captcha/meta information, question, Custom Programming, EX Dashboards, Loop and Merge, Recode Values, Report Styles, etc.

Qualtrics community is closely monitored by our live team of internal Qualtrics certified experts. We are dedicated to ensuring our users have an enriching and educational experience on our forums. Our active presence on our forums helps foster the positive experience Qualtrics community has boasted since its inception. With quick response time, helpful feedback, and continuous involvement, we direct conversations towards relevant topics designed to help new and old users have an enriching experience.

Approach to Survey Platform Implementation

Our approach to implementing the proposed survey platform for FCPS is focused on transparency, predictability, and delivering business value. The core members of the implementation team bring significant technical and domain expertise. Our project management promotes consistency, increases collaboration, enhances communication, increases visibility, and reduces risk. Our solution development lifecycle ensures our solution will be fit-for-purpose, within scope, and on time. Our training services will establish a knowledge transfer and training plan to build your independence.

Project Management

CESA 6 consultants will manage the project using a dedicated team of three to ensure timely support. Team members will provide regular updates to district staff, while meeting at regular intervals to plan, deploy, and review the surveys and results. Consultants will provide a documented project management plan, including key touchpoints, deliverables, and dates.

Communications Management and Cadence

CESA 6 consultants will establish weekly meetings with district staff, as well as provide a regular communication schedule on project progress. Consultants will be available within work hours (7:00 AM-5:00 PM) Monday-Friday to address district needs, and will be available to schedule needed meetings and provide video support.

Quality Assurance and User Acceptance Testing

CESA 6 consultants will provide daily updates, by school, of survey completion rates during survey window via a dashboard. Continually monitor and audit the activities of respondents. Track non-respondents and send reminders. Ensure that the integrity of the information surveyed, researched and collected remains contained.

Training

CESA 6 consultants will provide up to 16 hours of platform training to assist district staff with the dissemination, review, and use of reporting data. CESA 6 consultants will provide subject matter knowledge to interpret results, point to opportunities for growth, and support action plan development in alignment with continuous improvement efforts.

Roles and Responsibilities

Roles and Responsibilities of Implementation/Consulting Team: CESA 6

- Responsible for success of the program
- Action Item Management
- Provide status update to customer on ongoing basis
- Oversee structure & execution of implementation
- Primary customer point of contact during implementation
- Owning customer deliverables
- Project tracking
- Platform Training
- Solution Handover
- Post Launch Support

Preliminary Workplan

CESA 6 consultants will work with an identified District Implementation Team to design, deploy, and monitor the district-wide climate surveys. Implementation will occur in the following phases:
Phase I: Initial Planning (Two Weeks) CESA 6 consultants and district team members will meet regularly to identify program goals and set a project plan and timeline, as well as gather any needed data files from the district.
Phase II: Survey Design CESA 6 consultants will work with district team members on the survey methodology that will be used across the 4 climate surveys, including 4 vs 5 point scales, question types, desired response rates, and handling of partial responses. CESA 6 consultants will also work with district staff to identify which embedded data fields will be needed for disaggregation and analysis of responses and ensure those fields are captured. CESA 6 will provide a bank of field-tested, evidence-based question sets, as well as guidance on how to best tailor the questions to the district's needs. Question sets will be customizable and allow for the district's content and priorities. CESA 6 is able to utilize google translate functionality to translate the survey into the requested languages, including the question text and survey messages. These languages will be available to survey participants via an embedded drop-down in the survey that can be toggled on and off. CESA 6 will not be able to provide other translation services, including translation of response comments.
Phase III: Survey Deployment (Two Weeks) CESA 6 consultants will meet with the district to plan for survey distribution methodology, including whether or not authentication will be required. *Anonymity vs Confidentiality* There are two primary options for survey deployment. Option #1 includes CESA 6 deploying the survey through the distrct's instance of Qualtrics. This option would ensure the anonymity of responses but would give the district the ability to monitor and act on any problematic comments that come in, particularly from students. Option #1 includes CESA 6 deploying the survey in our instance of Qualtrics, scrubbing the data of any identifying information to ensure anonymity, and then uploading the data to the district's instance of Qualtrics for analysis and reporting. *Distribution Methodology* Distribution options provided by CESA 6 consultants will include: • Web-based links • Emailed links • QR codes Distribution methods can be customized on a per-survey basis. Response rates and completion will be monitored by CESA 6. CESA 6 will not be able to provide postcards or other mailing or hard copy options, however, Qualtrics will work with another vendor to handle these additional translation options/requests. These items are not included in the CESA 6 scope but are quoted elsewhere in the RFP response.

Phase IV: Results Analysis (Two Weeks
CESA 6 consultants will provide the following related to results reporting:

Executive Summary Report: CESA 6 consultants will provide an executive summary report to the District Executive Team, as well as facilitate a two-hour workshop with the team to help them access and understand the results.

Role-Based Dashboards: Role-based, always-on, online dashboards will be provided to the district to display results. These dashboards can be logged into by school-based leaders in order to view their site-specific data. The dashboard will include helpful directions and links, to assist dashboard users in navigating and using the results. The dashboard will also include the ability to filter and disaggregate results, while maintaining response count thresholds to protect small response groups.

Approach to Survey Research Services

CESA 6 consultants will work with district team members on the survey methodology that will be used across the 4 climate surveys, including 4 vs 5 point scales, question types, desired response rates, and handling of partial responses. CESA 6 consultants will also work with district staff to identify which embedded data fields will be needed for disaggregation and analysis of responses and ensure those fields are captured. CESA 6 will provide a bank of field-tested, evidence-based question sets, as well as guidance on how to best tailor the questions to the district's needs. Question sets will be customizable and allow for the district's content and priorities.

CESA 6 is able to utilize google translate functionality to translate the survey into the requested languages, including the question text and survey messages. These languages will be available to survey participants via an embedded drop-down in the survey that can be toggled on and off. CESA 6 will not be able to provide other translation services, including translation of response comments. Survey questions are proprietary and will not be included in the RFP.

Data Collection

CESA 6 consultants will meet with the district to plan for survey distribution methodology, including whether or not authentication will be required.

- *Anonymity vs Confidentiality:* There are two primary options for survey deployment. Option #1 includes CESA 6 deploying the survey through the District's instance of Qualtrics. This option would ensure the anonymity of responses but would give the district the ability to monitor and act on any problematic comments that come in, particularly from students. Option #1 includes CESA 6 deploying the survey in our instance of Qualtrics, scrubbing the data of any identifying information to ensure anonymity, and then uploading the data to the district's instance of Qualtrics for analysis and reporting.
- *Distribution Methodology:* Distribution options provided by CESA 6 consultants will include:
  - Web-based links
  - Emailed links
  - QR codes

Distribution methods can be customized on a per-survey basis. Response rates and completion will be monitored by CESA 6. CESA 6 will not be able to provide postcards or other mailing or hard copy options, however, Qualtrics will work with another vendor to handle these additional translation options/requests. These items are not included in the CESA 6 scope but are quoted elsewhere in the RFP response.

Reporting

CESA 6 consultants will provide the following related to results reporting:

- *Executive Summary Report:* CESA 6 consultants will provide an executive summary report to the District Executive Team, as well as facilitate a two-hour workshop with the team to help them access and understand the results.
- *Role-Based Dashboards:* Role-based, always-on, online dashboards will be provided to the district to display results. These dashboards can be logged into by school-based leaders in order to view their site-specific data. The dashboard will include helpful directions and links, to assist dashboard users in navigating and using the results. The dashboard will also include the ability to filter and disaggregate results, while maintaining response count thresholds to protect small response groups.

Responses to FCPS Research Services Requirements

The following content is our line-by-line responses to specific FCPS requirements as provided in this RFP for Research services.

Working closely with the FCPS staff to develop and deploy at least four districtwide surveys. This includes, but is not limited to determining survey format and questionnaire content, and writing questions that are clear and concise. Family and student surveys will be in multiple languages and must be both electronic and paper.

CESA 6 consultants will work with district team members on the survey methodology that will be used across the 4 climate surveys, including 4 vs 5 point scales, question types, desired response rates, and handling of partial responses. CESA 6 consultants will also work with district staff to identify which embedded data fields will be needed for disaggregation and analysis of responses and ensure those fields are captured.

CESA 6 will provide a bank of field-tested, evidence-based question sets, as well as guidance on how to best tailor the questions to the district's needs. Question sets will be customizable and allow for District's content and priorities.

CESA 6 is able to utilize google translate functionality to translate the survey into the requested languages, including the question text and survey messages. These languages will be available to survey participants via an embedded drop-down in the survey that can be toggled on and off. CESA 6 will not be able to provide other translation services, including translation of response comments

The contractor's question development process should include a review of past survey questions and results to ensure that existing trend data can continue going forward as appropriate as well a consideration of ways to utilize existing national data for comparison.

Survey options include field-tested items with benchmark recommendations depending on the scale chosen. Baseline district data as well as benchmarks will be used to determine progress.

Surveys utilized must be research based. Copies of surveys should be provided in the packet submitted in response to this RFP. If applicants are unable to provide surveys for review, a rationale as to why they are not provided must be included.

Survey questions are proprietary, and have not been included in the RFP. Survey questions are designed utilizing evidence-based practice, and are aligned to key components of stakeholder engagement.

The contractor will provide the flexibility to customize surveys to fit local requirements as needed and agreed upon by the vendor and the district.

Flexible options for question variance will be provided in order to ensure alignment to district priorities. Options provided will still align with guidelines for evidence-based practice.

The contractor must have the capacity to administer surveys in multiple formats, such as online, on paper, by mail, and by phone, as needed to increase the response rate.

CESA 6 consultants will provide surveys in online format.

Implementing, monitoring, and coordinating survey processes including initial invitations to participate, email reminders and distribution of results.

CESA 6 will provide a full-service survey deployment, including initial survey invitations, email reminders, and distribution of results through reports and role based dashboards.

Creating mobile-friendly surveys.

All deployed surveys will be mobile-friendly.

Advising FCPS on survey topics, design, and best practices regarding methodology, including but not limited to:

- **Outreach tools that are highly likely to yield the most accurate results (i.e., phone, US Mail, internet).**
- **Approach to framing questions.**
- **Recommended length of survey, to balance the desire for a high likelihood of a sufficiently high response rate and the desire to obtain a large amount of information.**
- **Ways to improve engagement approach.**

CESA 6 consultants will meet with the district to plan for survey distribution methodology, including whether or not authentication will be required.

Anonymity vs Confidentiality: There are two primary options for survey deployment. Option #1 includes CESA 6 deploying the survey through the District's instance of Qualtrics. This option would ensure the anonymity of responses but would give the district the ability to monitor and act on any problematic comments that come in, particularly from students. Option #1 includes CESA 6 deploying the survey in our instance of Qualtrics, scrubbing the data of any identifying information to ensure anonymity, and then uploading the data to the district's instance of Qualtrics for analysis and reporting.

Distribution Methodology: Distribution options provided by CESA 6 consultants will include:

- Web-based links
- Emailed links
- QR codes

Distribution methods can be customized on a per-survey basis. Response rates and completion will be monitored by CESA 6. CESA 6 will not be able to provide postcards or other mailing or hard copy options, however, Qualtrics will work with another vendor to handle these additional translation options/requests. These items are not included in the CESA 6 scope but are quoted elsewhere in the RFP response.

Preparing an analysis to include comparison of respondents and non-respondents on key variables, recommended subset analyses, and recommended format for presentation of results to stakeholders.

CESA 6 consultants will provide the following related to results reporting:

- *Executive Summary Report:* CESA 6 consultants will provide an executive summary report to the District Executive Team, as well as facilitate a two-hour workshop with the team to help them access and understand the results.
- *Role-Based Dashboards:* Role-based, always-on, online dashboards will be provided to the district to display results. These dashboards can be logged into by school-based leaders in order to view their site-specific data. The dashboard will include helpful directions and links, to assist dashboard users in navigating and using the results. The dashboard will also include the ability to filter and disaggregate results, while maintaining response count thresholds to protect small response groups.

Interpreting survey data.

See above

Providing comprehensive, final written reports including engagement performance, results, conclusions, analysis, and findings to share with the public, the Fayette County Board of Education, and district leaders.

See above.

The report should include narratives, graphs, tables for responses and an executive summary for each section.

See above.

Results must be presented in formats that are easy to interpret for all stakeholders.

See above.

Creating school-level reports in addition to districtwide reports.

Results reports will be provided via role-based dashboards that will allow for both school and district level reports.

Summarizing open ended response questions, with a thematic analysis, and recommending action steps to address concerns raised.

CESA 6 consultants will use the Qualtrics platform tools to disaggregate open ended comments provide thematic analysis, and recommend action steps to raise outcomes.

Presenting findings as requested.

CESA 6 will provide findings both in terms to key internal and external stakeholders through dashboard reporting, electronic reports, and presentations. CESA 6 recently provided results reporting to Killeen ISD's school board. A video recording of the presentation can be found here: https://www.killeenisd.org/110822_BoardMT

Post Go-Live Survey Platform Support

We want to ensure you have what you need to be successful with Qualtrics and get the most out of your license. To help your team master the Qualtrics product and grow your experience management programs, we have a number of support and advisory offerings that have been included as part of our proposal to FCPS.

XM Basecamp: XM Basecamp is the official site for online Qualtrics training resources. Your team will be able to access XM Basecamp free of charge with their Qualtrics credentials. On XM Basecamp you will find an extensive library of on-demand training videos and courses that will cover both the Qualtrics product and XM methodology. Qualtrics Certification courses are also available on XM Basecamp. These courses provide a structured learning journey for your team to learn Qualtrics. They consist of training content, hands-on activities, quizzes, and a proctored certification exam to verify mastery of the Qualtrics platform.

Qualtrics Support: Qualtrics has an online website, https://www.qualtrics.com/support/. This site provides an online feature-by-feature user guide. It contains articles, guides, step-by-step instructions for using most every platform feature, video examples, and more.

Qualtrics Community: We offer an active, international, and free forum for all Qualtrics users. Our system connects professionals drawn from our 16,750 enterprise clients, allowing questions to be asked and best practices around using Qualtrics to perform world-class research to be shared. This service allows Toronto Police Service's employees to discuss a variety of Qualtrics' best practices with a diverse group of users, including CEOs, CFOs, university professors, managers and stakeholders from all fields. This will help drive innovation at Toronto Police Service so you can get the most out of our platform.

Research and Qualtrics veterans are encouraged to share their expertise, receiving badges and community recognition when they provide quality comments. Community features like up-voting, downvoting, and flagging help ensure that the most valuable, relevant, and useful feedback rises to the top. We encourage users to post frequently and use tags to help make content easier to find for those searching for answers. Some examples of tags include administration, action, CAS SSO setup, CX, captcha/meta information, question, Custom Programming, EX Dashboards, Loop and Merge, Recode Values, Report Styles, etc.

Qualtrics community is closely monitored by our live team of internal Qualtrics certified experts. We are dedicated to ensuring our users have an enriching and educational experience on our forums. Our active presence on our forums helps foster the positive experience Qualtrics community has boasted since its inception. With quick response time, helpful feedback, and continuous involvement, we direct conversations towards relevant topics designed to help new and old users have an enriching experience.

Qualtrics University (24/7 Live Support): All users have access to live support from our world-class support team, at no additional cost. In an industry where the standard customer satisfaction is 95%, we have always excelled, generally averaging 97% satisfaction.

Our live support is one of our key differentiators as a company, and clients often comment on how this is one of the most valuable aspects of the Qualtrics relationship. Users can reach our support team 24/7, through phone, chat, or email. We keep logs to give context for any recurring issues and immediate help. We provide support in English and 8 other languages, including French, German, Spanish, and Portuguese. Our additional languages are primarily available during the regular business hours of the language region and are not guaranteed to be available 24/7.

Chat, email, and phone support can be accessed through the Support Site by clicking Contact Us. A list of localized numbers can be found at the following URL: https://www.qualtrics.com/contact/

Our support team has divisions located in our Provo, Dublin, and Sydney offices, meaning clients can call in and get a trained technical specialist on the phone to immediately troubleshoot issues or learn aspects of the tool, at any time of the day or night. Most support requests made over the phone are resolved within the first call.

We also offer an extensive digital support environment with support pages, walk-throughs, and even a section containing recorded webinars. We also have an active community where users can collaborate on tough problems, answer each other's questions, network, and share best practices.

For technical support, while we don't provide SLAs, we can reference some key stats:

- Phone: 91.1% First Call Resolution (Industry is 64.1%) and 1.3 mins average phone hold time (Industry is 7.5 mins)
- Email: 37 mins average email wait time (Industry is >120 mins).
- Escalation to Tier 2: For issues that require an escalation to engineering: 25% are resolved within 2 days.

Standard (non-custom) trainings and support are provided via webinars and other online training materials and is included for all FCPS users within the License Configuration. Custom training shall be provided upon FCPS request for an additional fee, either via online webinar or on-site. Fees for custom training shall be agreed upon by the Parties, in advance.

Update Announcements and Technical Newsletters: Platform updates are communicated through email and at the following website: https://www.qualtrics.com/product-updates/. Technical newsletters are distributed via email.

Platform-Wide Patches and Upgrades: Qualtrics provides updates to its platforms approximately every two weeks. Updates are done on a rolling basis, so downtime is not required. We communicate new feature updates to clients upon release. Please see https://www.qualtrics.com/community/categories/support-site-product-updates for weekly product updates and corresponding support site pages. All users are on the latest version of the platform.

Part IV

Cost Proposal

COST PROPOSAL

- Cost proposal of all fees associated with the scope of work. Please include an overall total price and a break down by unit pricing including quantities or hourly costs.

Total Price $ 141,180 (Year 1 Total)

$ 640,700 (5-year Total)

Pricing subject to **Reciprocal preference for Kentucky resident bidders and Preferences for a Qualified Bidder or the Department of Corrections, Division of Prison Industries (KAR 200 5:410).**

In accordance with KRS 45A.490 to 45A.494, a resident Offeror of the Commonwealth of Kentucky shall be given a preference against a nonresident Offeror. In evaluating bids/proposals, Fayette County Public Schools will apply a reciprocal preference against an Offeror submitting a bid/proposal from a state that grants residency preference equal to the preference given by the state of the nonresident offeror. Residency and non-residency shall be defined in accordance with KRS 45A.494(2) and 45A.494(3), respectively. Any Offeror claiming Kentucky residency status shall submit with its proposal a notarized affidavit affirming that it meets the criteria as set forth in the above referenced statute.

qualtrics XM

Order Form

Parties:	Qualtrics, LLC 333 W. River Park Dr. Provo, UT 84604 United States (“**Qualtrics**”)	Fayette County Schools 701 E Main St Lexington, KY 40502 United States (“**Customer**”)
Effective Date:	The date signed by the last party to sign.	
Governing Document:	This Order Form is subject to the Qualtrics Terms of Service at https://www.qualtrics.com/terms-of-service/ (the “**Agreement**”). All capitalized terms used but not defined herein have the meanings given to them in the Agreement. If there is a conflict between the terms of the Agreement and this Order Form, this Order Form will control.	
Attachments:	- Service Level Exhibit - Fees Exhibit - Cloud Service Exhibit - Professional Services Exhibit(s)	
Services:	As set forth in the exhibits attached hereto	
Term:	As set forth in the exhibits attached hereto	
Payment Terms:	As set forth in the exhibits attached hereto	
Additional Terms:		

To be completed by Customer			
Regional Data Center:		**Purchase Order Number (if any):**	
Email Address for Invoice Submission:	matthew.moore@fayette.kyschools.us	**Shipping Address:**	
Invoicing Instructions (if applicable):		**Billing Address for Invoice Submission:**	701 E Main St Attn: Fayette County Schools | Fayette County Schools Lexington KY United States 40502

Qualtrics	**Customer**
By (signature):	By (signature):
Name:	Name:
Title:	Title:
Date:	Date:
Qualtrics Primary Contact:	**Customer Primary Contact:**
Name: David Black	Name: Betsy Rains
Phone:	Phone: (859)381-4000
Email: dblack@qualtrics.com	Email: betsy.rains@fayette.kyschools.us

qualtrics.XM

Order Form

Service Level Exhibit

Service Levels

1. **Availability.** Qualtrics will use commercially reasonable efforts to ensure that the Cloud Service will be available at all times, excluding when the Cloud Service is unavailable due to (a) required system maintenance as determined by Qualtrics ("**Scheduled Maintenance**"); and (b) causes outside of the reasonable control of Qualtrics that could not have been avoided by its exercise of due care, including any outages caused by: (i) the Internet in general; (ii) a Customer-caused event; or (iii) any Force Majeure Event ("**Availability**").
2. **Scheduled Maintenance.** A minimum of five days' advance notice will be provided by email to Customer for all Scheduled Maintenance exceeding two hours. For Scheduled Maintenance lasting less than two hours, notice will be displayed on the login page.
3. **Downtime.** "**Downtime**" is defined as the Cloud Service having no Availability, expressed in minutes.
4. **Remedies for Downtime.** If Downtime exceeds a certain amount per month, Customer will be entitled, upon written request, to a credit ("**Fee Credit**") based on the formula: Fee Credit = Fee Credit Percentage set forth below * (1/12 current annual Fees paid for Software affected by Downtime). All times listed immediately below are per calendar month.
    1. If Downtime is 30 minutes or less, no Fee Credit Percentage is awarded.
    2. If Downtime is from 31 to 120 minutes, Customer is eligible for a Fee Credit Percentage of 5%.
    3. If Downtime is from 121 to 240 minutes, Customer is eligible for a Fee Credit Percentage of 7.5%.
    4. If Downtime is 241 minutes or greater, Customer is eligible for a Fee Credit Percentage of 10.0%

Order Form

Fees Exhibit

License Details

Start Date	End Date	Term in Months
First date of the initial period in the table below	Last date of the final period in the table below	60

Cloud Service Details

Period	Services	Price	Estimated Invoice Date	Payment Terms from Invoice	License Configuration
02-Jan-2023 TO 01-Jan-2024	Cloud Professional	$125,380.00 $15,800.00	Effective Date	Net 30	Q-1844584
02-Jan-2024 TO 01-Jan-2025	Cloud Professional	$124,880.00 $0.00	03-Dec-2023	Net 30	Q-1844595
02-Jan-2025 TO 01-Jan-2026	Cloud Professional	$124,880.00 $0.00	03-Dec-2024	Net 30	Q-1844597
02-Jan-2026 TO 01-Jan-2027	Cloud Professional	$124,880.00 $0.00	03-Dec-2025	Net 30	Q-1844820
02-Jan-2027 TO 01-Jan-2028	Cloud Professional	$124,880.00 $0.00	03-Dec-2026	Net 30	Q-1844821
Total		**USD $640,700.00**			

Prices shown do not include applicable taxes. Applicable taxes will be presented on the invoice.

Press Release
Notwithstanding anything to the contrary in the Agreement, upon Customer's consent, Qualtrics may issue a press release naming Customer as a customer of Qualtrics.

Order Form

Cloud Service Exhibit

Cloud Service Renewal (not applicable to pilots or proofs of concept). Qualtrics sends renewal notices to customers at least 60 days before the end of the term. Upon expiration of each term, the Cloud Service will automatically renew for a successive one-year term with a price increase of no more than 5% at such renewal, unless either party provides notice of nonrenewal at least 30 days prior to the end of the term.

[Description of Services on following page]

Order Form

YEAR 1
Q-1844584

CLOUD SERVICE

CoreXM Additional Offerings

DesignXM Enterprise - User : Includes up to 20
DesignXM Enterprise - Responses : up to 20000
DesignXM Enterprise - Additional Responses : up to 180000
CoreXM SMS Text Reserve : 50000

YEAR 2
Q-1844595

CLOUD SERVICE

DesignXM

DesignXM Enterprise - User : Includes up to 20
DesignXM Enterprise - Responses : up to 20000
DesignXM Enterprise - Additional Responses : up to 180000

YEAR 3
Q-1844597

CLOUD SERVICE

DesignXM

DesignXM Enterprise - User : Includes up to 20
DesignXM Enterprise - Responses : up to 20000
DesignXM Enterprise - Additional Responses : up to 180000

YEAR 4
Q-1844820

CLOUD SERVICE

DesignXM

DesignXM Enterprise - User : Includes up to 20
DesignXM Enterprise - Responses : up to 20000

Order Form

DesignXM Enterprise - Additional Responses : up to 180000

YEAR 5
Q-1844821

CLOUD SERVICE

DesignXM

DesignXM Enterprise - User : Includes up to 20
DesignXM Enterprise - Responses : up to 20000
DesignXM Enterprise - Additional Responses : up to 180000

Order Form

Professional Services Exhibit: SSO Configuration

Customer agrees that Qualtrics may use subcontractors to deliver any portion(s) of the Project at Qualtrics' discretion.

1. **Definitions**
    a. "Delivery Team" refers to the SET of resources assigned for fulfillment of project scope. "Project" refers to the SSO Configuration to be provided under this Professional Services Exhibit.
    b. "Standard Business Hours" are 0900 to 1700 hours according to the time zone of the office in which Delivery Team is located, unless otherwise agreed to in writing during the Project.

2. **Project Scope**
    a. Inclusions
        i. SSO (Single Sign-On) Configuration
    b. Assumptions
        i. For the duration of the Project, Customer will provide the Delivery Team with access to Customer's Qualtrics brand (account) as a brand administrator.

3. **Responsibilities**
    a. Delivery Team Responsibilities
        i. Provide documentation, specifications, and requirements for SSO set-up.
        ii. Conduct Q&A session with Customer and Customer IT/SSO team to identify any potential roadblocks, including a non-standard SSO system.
        iii. Configure a test brand to validate SSO setup.
        iv. Provide configuration details for the test brand and a login URL for setup validation.
        v. Provide support in troubleshooting any errors that arise in the test instance.
        vi. Test the SSO setup within a test brand before transferring to the live brand.
        vii. After successful testing of the configuration, provide configuration details to the Customer for the live brand, then transfer the configuration to the live brand.
    b. Customer Responsibilities
        i. Provide key configuration details of SSO system as requested by Qualtrics, dependent on the type of SSO connection.
        ii. If customer SSO can support it, ensure SSO is set up to pass any user attributes required for dashboard permissioning.
        iii. Ensure that a user in the Customer's IdP can successfully login to the Qualtrics platform using their SSO credentials.
        iv. Manages User Acceptance Testing ("UAT") process and any special testing requirements.

4. **Governance**
    a. Delivery Team will reach out to Customer after completion of request survey within the timeline specified in request survey to schedule a Project kickoff call or coordinate via email. Timing of kickoff call will be mutually agreed between Delivery Team and Customer based on Delivery Team availability and Customer's milestones.
    b. The Project is complete based on completion of delivery and Customer's acceptance, per the terms of the Acceptance Criteria section.
    c. Unless otherwise agreed by both parties in writing, all interactions and meetings will be conducted in English, and will be conducted remotely, via phone, email, or videoconference.

5. **Acceptance Criteria**

a. Once SSO Configuration is completed and the Delivery Team provides notification for review and approval, the Customer will either (1) confirm the requirements have reasonably been met and sign off on the approval or (2) reply to the Delivery Team, in writing, detailing the specific requirements that must still be met. Upon mutual agreement, both parties may agree to extend the time period for UAT, though additional time may impact Project timelines and budget and be subject to a Change Order (as defined below).

b. SSO Configuration will be reviewed and signed off according to the following process:
   i. Delivery Team will provide configuration details to the Customer for the live brand and transfer the configuration to the live brand at least 5 business days prior to the Deliverable completion date.
   ii. Customer will sign off or report any issues within 5 business days of submission.
   iii. The Delivery Team will correct reported issues within a mutually agreed time frame.
   iv. Customer will provide written feedback and raise issues related to the reworked portion within a mutually agreed time frame, and the Delivery Team will make changes necessary to resolve the issues.
   v. Customer will provide final review and signoff within 2 business days.
   vi. SSO Configuration will be considered accepted if the Customer does not provide written notification of SSO Configuration rejection within the timelines specified above.

6. Third Party Vendors and Products

a. Customer remains responsible for their own vendors and third parties providing services related hereto.

b. Qualtrics is not responsible for third party products obtained by Customer.

7. Change Orders

a. If Customer or Delivery Team wishes to change the scope of the Project, they will submit details of the requested change to the other in writing. Delivery Team will, within a reasonable time after such request is received, provide a written estimate to Customer of changes to Project cost, timeline, and/or scope.

b. Promptly after receipt of the written estimate, Customer and Delivery Team will negotiate and agree in writing on the terms of such change (a "Change Order"). Each Change Order complying with this Section will be considered an amendment to this Service Order.

Order Form

Professional Services Exhibit: SSO Configuration

Customer agrees that Qualtrics may use subcontractors to deliver any portion(s) of the Project at Qualtrics' discretion. Qualtrics currently intends to use Cooperative Educational Service Agency (CESA 6). Qualtrics will provide notice to Customer if the delivery subcontractor changes.

Overview: Cooperative Educational Service Agency (CESA) 6, is a service provider for K-12 school districts across the state of Wisconsin, and throughout the broader United States. CESA 6 is a proud member of the Qualtrics Partner Network, a network of service agencies providing implementation and consulting services to Qualtrics user districts that are customized to the client's needs.

Profile: You can view our departmental & consultant **profile here**.

What A Partnership with CESA 6 Looks Like

Qualtrics Technical Expertise Our team has applied experience using and training on the following Qualtrics systems:		
• Surveys • Dashboards	• Workflows • Ticketing	• Stats IQ & Text IQ • XM Directory
K-12 Expertise Our team of consultants has decades of experience in K-12 education, having served as teachers, principals, assessment coordinators, district-level administrators, and assistant superintendents. Our team is up to date on current educational research and can help maximize your use of Qualtrics by aligning seamlessly with the K-12 space. In addition to technical expertise, working with our team also provides assistance with the following areas:		
Design Consultation	**Data Analysis & Reporting**	**Evidence-Based Action**
Our consultants will listen to understand your implementation needs, and provide advice on how to streamline the project to maximize value.	Our consultants will assist with the analysis and reporting of implementation data, including recommendations for visualizations and comparisons that reach beyond the most common.	Our consultants will help apply the data to continuous improvement actions, through advice on how to turn your implementation project into a data system rather than a data event.

TEAM STRUCTURE AND APPROACH
Your implementation team will include the following core team members:

Dr. Nick Kohn: Lead Implementer
Resume

Michelle Plaushines: Lead Implementer
Resume

Josh Borzick: Lead Implementer
Resume

Requirements That Will Be Met by CESA 6 Consultants:
• Working closely with the FCPS staff to develop and deploy at least four districtwide surveys. This includes, but is not limited to determining survey format and questionnaire content, and writing questions that are clear and concise. Family and student surveys will be in multiple languages and must be both electronic and paper.

Order Form

• The contractor's question development process should include a review of past survey questions and results to ensure that existing trend data can continue going forward as appropriate as well as a consideration of ways to utilize existing national data for comparison.

• Surveys utilized must be research-based. Copies of surveys should be provided in the packet submitted in response to this RFP. If applicants are unable to provide surveys for review, a rationale as to why they are not provided must be included.

• The contractor will provide the flexibility to customize surveys to fit local requirements as needed and agreed upon by the vendor and the district.

• The contractor must have the capacity to administer surveys in multiple formats, such as online, on paper, by mail, and by phone, as needed to increase the response rate.

• Implementing, monitoring, and coordinating survey processes including initial invitations to participate, email reminders and distribution of results.

• Creating mobile-friendly surveys.

• Advising FCPS on survey topics, design, and best practices regarding methodology, including but not limited to: o Outreach tools that are highly likely to yield the most accurate results (i.e., phone, US Mail, internet). o Approach to framing questions. o Recommended length of survey, to balance the desire for a high likelihood of a sufficiently high response rate and the desire to obtain a large amount of information. o Ways to improve engagement approach.

• Preparing an analysis to include comparison of respondents and non-respondents on key variables, recommended subset analyses, and recommended format for presentation of results to stakeholders. • Interpreting survey data.

• Providing comprehensive, final written reports including engagement performance, results, conclusions, analysis, and findings to share with the public, the Fayette County Board of Education, and district leaders

• The report should include narratives, graphs, tables for responses and an executive summary for each section. • Results must be presented in formats that are easy to interpret for all stakeholders.

• Creating school-level reports in addition to districtwide reports.

• Summarizing open ended response questions, with a thematic analysis, and recommending action steps to address concerns raised.

• Presenting findings as requested.

• Providing all raw data from the survey(s) in CSV and/or .xlsx formats for further analysis by FCPS. • All data will be owned by FCPS.

• Providing daily updates, by school, of survey completion rates during the survey window.

• Back translating responses in other languages.

• Continually monitoring and auditing the activities of respondents.

• Tracking non-respondents and sending reminders.

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• Ensuring that the integrity of the information surveyed, researched and collected remains contained. Innovative and Creative Solutions

• FCPS is open to other suggestions of how we can understand, evaluate, and improve the experiences our employees, students, and staff have in our schools. We are interested in hearing your recommendations and ideas of how we can engage our stakeholders and gather their input.

We will address the following deliverables through a comprehensive and phased approach:

Phasing	CESA 6 consultants will work with an identified Fayette County Public Schools Implementation Team to design, deploy, and monitor the district-wide climate surveys. Implementation will occur in the following phases.
Phase I: Initial Planning (One Week)	CESA 6 consultants and district team members will meet regularly to identify program goals and set a project plan and timeline, as well as gather any needed data files from the district.
Phase II: Survey Design (Two Weeks)	CESA 6 consultants will work with district team members on the survey methodology that will be used across the 4 climate surveys, including 4 vs 5 point scales, question types, desired response rates, and handling of partial responses. CESA 6 consultants will also work with district staff to identify which embedded data fields will be needed for disaggregation and analysis of responses and ensure those fields are captured. CESA 6 will provide a bank of field-tested, evidence-based question sets, as well as guidance on how to best tailor the questions to the district's needs. Question sets will be customizable and allow for Fayette County Public Schools content and priorities. Question sets include the use of open source survey questions such as those provided by Panorama or the **U.S. Department of Education**. CESA 6 developed, evidence-based, benchmarked questions are also available. These questions are proprietary and can not be shared with the RFP, but are in line with previously listed questions in terms of quality and design. CESA 6 is able to utilize google translate functionality to translate the survey into the requested languages, including the question text and survey messages. These languages will be available to survey participants via an embedded drop-down in the survey that can be toggled on and off. CESA 6 will not be able to provide other translation services, including translation of response comments, however, Qualtrics will work with another vendor to handle these additional translation options/requests. These items are not included in the CESA 6 scope but are quoted elsewhere in the RFP response.
Phase III: Survey Deployment (Two Weeks)	CESA 6 consultants will meet with the district to plan for survey distribution methodology, including whether or not authentication will be required. ***Anonymity vs Confidentiality*** There are two primary options for survey deployment. Option #1 includes CESA 6 deploying the survey through the Fayette County Public Schools instance of Qualtrics. This option would ensure the anonymity of responses but would give the district the ability to monitor and act on any problematic comments that

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	come in, particularly from students. Option #1 includes CESA 6 deploying the survey in our instance of Qualtrics, scrubbing the data of any identifying information to ensure anonymity, and then uploading the data to the Fayette County Public Schools instance of Qualtrics for analysis and reporting. ***Distribution Methodology*** Distribution options provided by CESA 6 consultants will include: • Web-based links • Emailed links • QR codes • SMS Distributions Distribution methods can be customized on a per-survey basis. Response rates and completion will be monitored by CESA 6. CESA 6 will not be able to provide postcards or other mailing or hard copy options, however, Qualtrics can work with another vendor to handle these additional translation options/requests. These items are not included in the CESA 6 scope. Embedded Qualtrics tools will include automated reminder emails and thank you messages. Daily survey response rate data will be monitored via an always-on dashboard.
Phase IV: Results Analysis (Two Weeks)	CESA 6 consultants will provide the following related to results reporting: ***Executive Summary Report*** CESA 6 consultants will provide an executive summary report to the District Executive Team, as well as facilitate a two-hour workshop with the team to help them access and understand the results. ***Role-Based Dashboards*** Role-based, always-on, online dashboards will be provided to the district to display results. These dashboards can be logged into by school-based leaders in order to view their site-specific data. The dashboard will include helpful directions and links, to assist dashboard users in navigating and using the results. The dashboard will also include the ability to filter and disaggregate results, while maintaining response count thresholds to protect small response groups. ***Data Sets*** Provided data sets include but are not limited to: • Agreement level/average statement scores by school and grade level. • Demographic comparisons. • Net promoter scores and key driver analysis. • Significance testing to identify differences in scores. • Thematic comment analysis. ***Open Comment Analysis*** CESA 6 consultants will use the Qualtrics platform tools to disaggregate open-

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	ended comments, provide thematic analysis, and recommend action steps to raise outcomes.
Phase V: Customer Service & Professional Development	CESA 6 will provide a dedicated customer service manager who will be available during all working hours. Additionally, a Qualtrics support team will be available to provide technical assistance 24 hours a day and 7 days a week. CESA 6 consultants will meet on a bi-weekly basis with the service manager to review progress, and support needed development. CESA 6 consultants will also be available to travel onsite to the Fayette County Public Schools to assist with presenting results information to the Fayette County Public Schools Board of Education. **HERE IS AN EXAMPLE** of CESA delivering a board report on a series of climate surveys in Killeen Texas.

Client Responsibilities: The client will be responsible for:

- Providing the consultant with access to the Qualtrics system.
- The formatting, collection, and sharing of needed data files.
- Scheduling and attending agreed-upon training sessions with the consultant.
- Internal testing of training projects to ensure functionality.

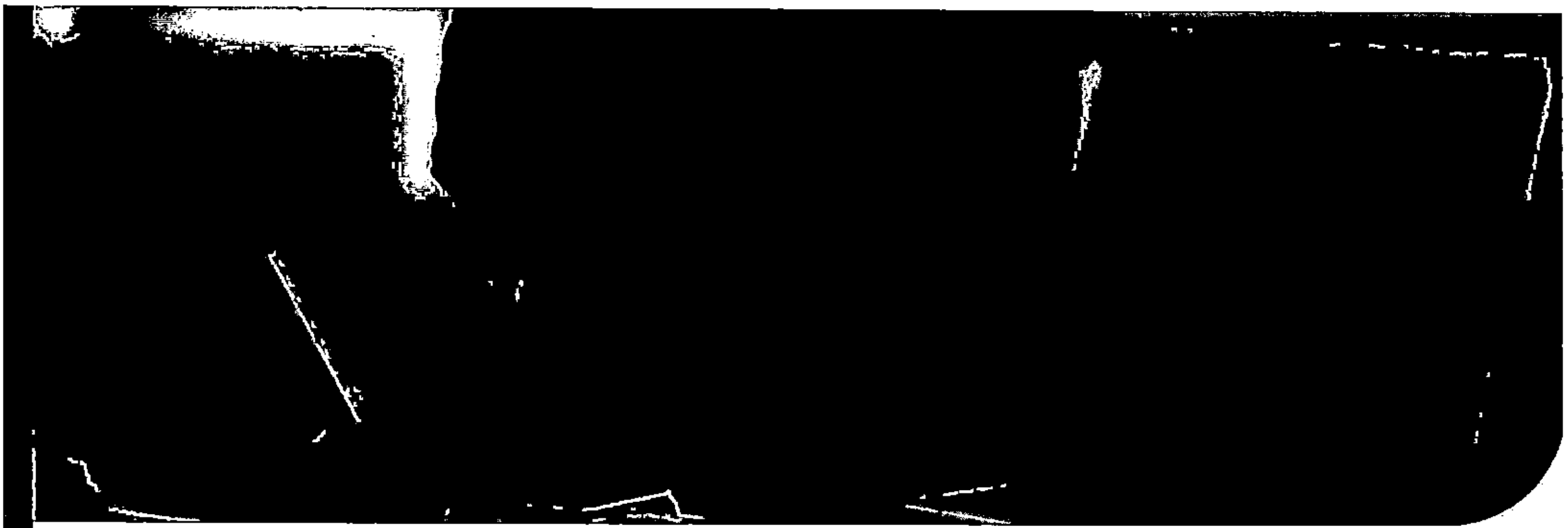
Please note that CESA 6 consultants will **not** be available to support between Friday at 5:00 PM CST and Monday at 7:00 AM CST. Qualtrics technical support should be utilized during these times.

*Planned development sessions will occur virtually. Any in-person training requested by the client will be at the expense of the client, and is not included in the above amounts.

**The cost includes direct support hours as well as offline consultant preparation time, design time, and tech support on behalf of the client. Total hours will be tracked by the consultant and provided to the client when requested.

Part V

Added Value



Create a student and family focused culture.

Data proliferation makes it hard to separate signal from noise. On top of this, siloed, insecure, outdated technology, budget constraints and equity challenges make it hard to ensure every student and family have a voice. Determine what really matters, what drives behaviors, and what actions need to be taken with Qualtrics StudentXM.

DUVAL COUNTY PUBLIC SCHOOLS | San José Unified School District | Pittsburgh Public Schools | Orange County Public Schools | Chicago Public Schools

UNDERSTAND DRIVERS OF YOUR REPUTATION

Integrate sentiment and operational data on prospective student and family experiences with key operational data - such as enrollment numbers - to understand the drivers of student enrollment to identify actions you can take to increase it.

> The only way we're going to be able to navigate these difficult times for our students and their families is to make the best decisions possible with the most current and accurate data."

R. KENT PAREDES SCRIBNER
SUPERINTENDENT
FORT WORTH ISD

qualtrics.XM

OPTIMIZE THE ENROLLMENT PROCESS

Understand what's working well or causing pain in the enrollment process and make improvements that will give families a great first impression.

IMPROVE THE LEARNING EXPERIENCE

Understand what drives or hinders student participation in in-person and remote learning and provide teachers with insights to help them drive student success and create an inclusive learning environment.

MONITOR AND MANAGE STUDENT HEALTH AND WELLBEING

Create a new normal conducive to student wellbeing and easily uncover insights into how or when students or families are struggling. Take action with confidence, using accurate leading indicators.

KEEP STUDENTS PROGRESSING ON THEIR LEARNING JOURNEY

Identify leading indicators of student retention and take early, targeted action to help at-risk students and drive student retention and graduation.

Setting Foundations, Made Simple

Go beyond ad hoc feedback with Student- and Family- Experience Management (XM) to drive better decision-making, smarter processes and targeted interventions.

ULTIMATE LISTENING

Use 'always on' digital listening together with customer Hear the student and family voice – on every channel. Meet your students and family where they are and move your student experience programs beyond ad hoc feedback with multichannel listening including web, SMS, chat, and more.

PREDICTIVE AI

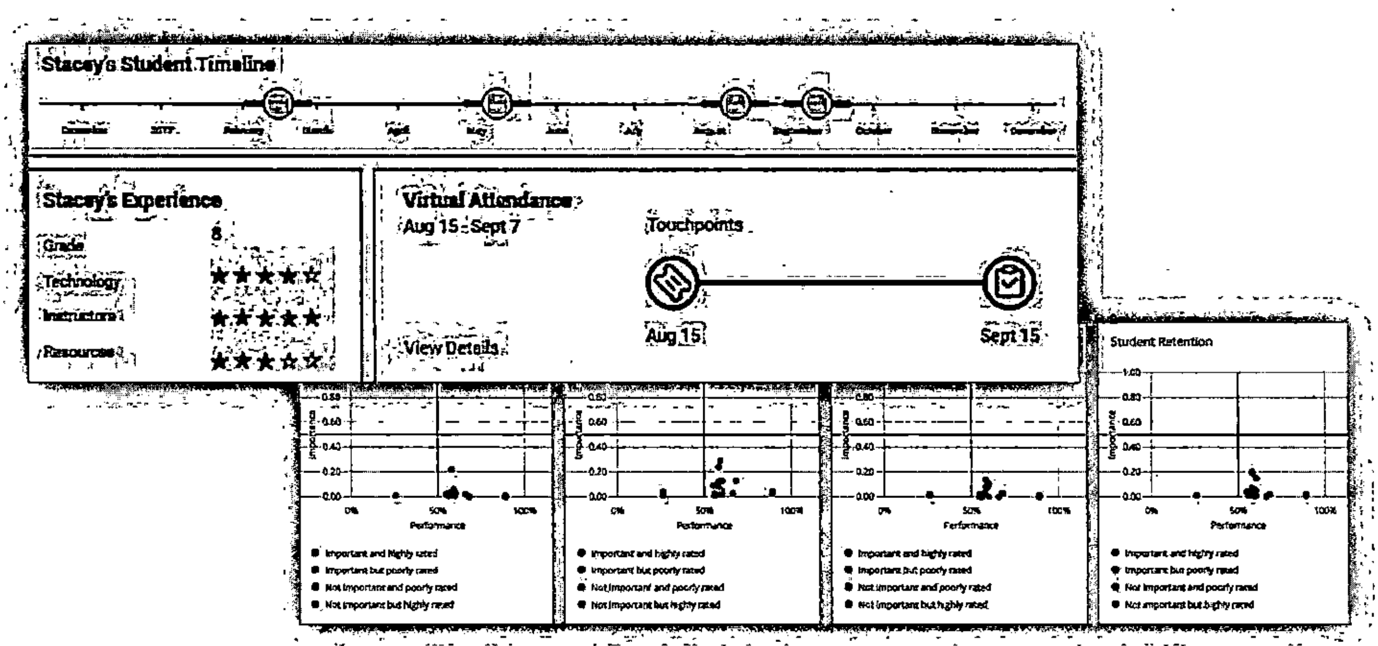
Understand the why behind the what. Surface key drivers behind your students and families' actions with iQ, our predictive intelligence engine. See what matters most and the recommended solutions predicted to have the most impact.

AUTOMATED ACTIONS

Close the loop quickly with automated workflows that drive action in the platforms that employees already use, including Zendesk, ServiceNow, and many more. Easily share insights throughout your organization with relevant smart notifications and mobile app access. Create action plans, identify collaborators, and set milestones to ensure your VoC program has impact.

ENTERPRISE GRADE

Ensure peace of mind with enterprise-grade security, privacy, monitoring, and data access controls that keep information safe and secure. Benefit from easy access to GDPR requests and tight sensitive information controls, and easily enforce what data you need to collect, retain and delete.



qualtrics XM

Learn more about
Qualtrics Experience Management:
qualtrics.com/education

Part VI

Supplier Diversity Form(s)

Fayette County Public Schools
<u>Waiver for Participation</u> of Minority, Women, and Veteran-Owned Business Enterprises
(Form to be submitted with Bid Document)

Project Name: Fayette County Schools Survey Research

Project Bid#: 00649364

Bidder/Contractor: Qualtrics, LLC

Contact Person: Mark Creer

Address: 333 W. River Park Dr. Provo, Utah 84604

Phone: (801) 374-6682

Email: legal-sales@qualtrics.com

The above-named bidder cannot fulfill its commitment to minority, women, and veteran-owned business enterprises' participation due to the following reasons:

_____ Items being bid are not applicable for subcontracting.

__X__ Other (Provide detailed explanation.)

CESA-6 has been selected as the vendor of choice to provide the professional services as they are one of the few implementation and research services firms within the Qualtrics Partner Network with the requisite technical and industry expertise. CESA-6's proven track record of success and demonstrated K-12 advisory expertise will decrease project risk for and better ensure delivery of business value to FCPS.

To the best of my knowledge and belief, the above information is true, accurate, and complete and reflects our commitment to support the minority, women, and veteran-owned business enterprise initiative of Fayette County Public Schools.

[signature]

Bidder/Contractor Signature

Director

Title

8 December 2022

Date

APPROVAL FOR CONTRACT EXTENSIONS

1. RFP 61-19 Office and Classroom Supplies - Catalog

BACKGROUND AND RATIONALE:
This RFP was issued to provide an approved vendors list for office and classroom supplies to be used by the district and the contract gives the option to renew for an additional year for up to 5 years upon Board approval. This would be the third renewal.

Vendor:
Kerr Workplace Solutions WBE
School Specialty
ODP Solutions
Action Business Suppliers VBE
Hurst Office Suppliers
Guy Brown MBE

Contract Period: Beginning January 1, 2023 and ending December 31, 2023

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Office/ Classroom Supplies – Catalog Contract	Last fiscal year's expenditure was approximately $1,375,000.00	Schools and departments	Recurring	Immediate impact to enable FCPS to purchase office and classroom supplies as needed and at the best price to prevent a disruption in the educational process.

Funding key: Schools and Departments

STAFF CONTACT: Dan Sawyers, Director of Logistical Services/Purchasing

POLICY REFERENCE: KRS 45A.370

RECOMMENDATION: A motion is in order to:
"Extend the contract for one year to Kerr Workplace Solutions, School Specialty, ODP Solutions, Action Business Suppliers, Hurst Office Suppliers and Guy Brown "

2. RFP 68-19 – Student Pictures

BACKGROUND AND RATIONALE:
This is a school picture RFP that affords annual quality photos for students and parents to purchase and serves as a fundraising project for individual schools. The established contracts provide for furnishing individual pictures at the most favorable prices and terms possible with schools receiving the "school markup". The contract gives the option to renew for an additional year for up to 5 years upon Board approval. This would be the third renewal.

Vendor:
Holifield Photography
Lifetouch National School Studios
Strawbridge Studio
Triple Play Productions

Contract Period: January 1, 2023 and ending December 31, 2023

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Student Pictures	Not Applicable	Not Applicable	Recurring	Will allow students and parents to receive quality photography services annually and provide a fundraiser project for schools

STAFF CONTACT: Dan Sawyers, Director of Logistical Services/Purchasing

POLICY REFERENCE: KRS 45A.365

RECOMMENDATION: A motion is in order to:
"Extend the contract for one year to Triple Play Productions, Holifield Photography, Lifetouch National School Studios and Strawbridge Studios."

3. RFP 28-21 Science Equipment – Materials - Supplies Catalog Contract

BACKGROUND AND RATIONALE:

This RFP provides a multiple award catalog contract used to purchase science equipment, materials and supplies for FCPS. The RFP included a sample price list of some of the most popular items ordered for science and was evaluated on the pricing for these items along with the general discount offered, experience, shipping time and the number of items available from the vendors. The contract gives the option to renew for an additional year for up to 5 years upon Board approval. This would be the first renewal.

Vendor:

Fisher Scientific Company

School Specialty

VWR International (Wards, Sargent Welch)

Carolina Biological

Contract Period: Beginning January 1, 2023 and ending December 31, 2023

PROPOSAL:

Item	Amount	Funding Source	Recurring/ Nonrecurring	Measurable Expected Impact and Timeline
Science Equipment/ Materials/ Supplies	Last year's expenditure was approximately $50,000.00	Schools and departments	Recurring	Immediate contract to provide Science equipment/ materials/supplies for all schools K-12.

Funding key: Schools and Departments

STAFF CONTACT: Dan Sawyers, Director of Logistical Services and Purchasing

POLICY REFERENCE: KRS 45A.365

RECOMMENDATION: A motion is in order to:
"Extend the contract for one year to Fisher Scientific Company, School Specialty, VWR International and Carolina Biological Supply Co."